

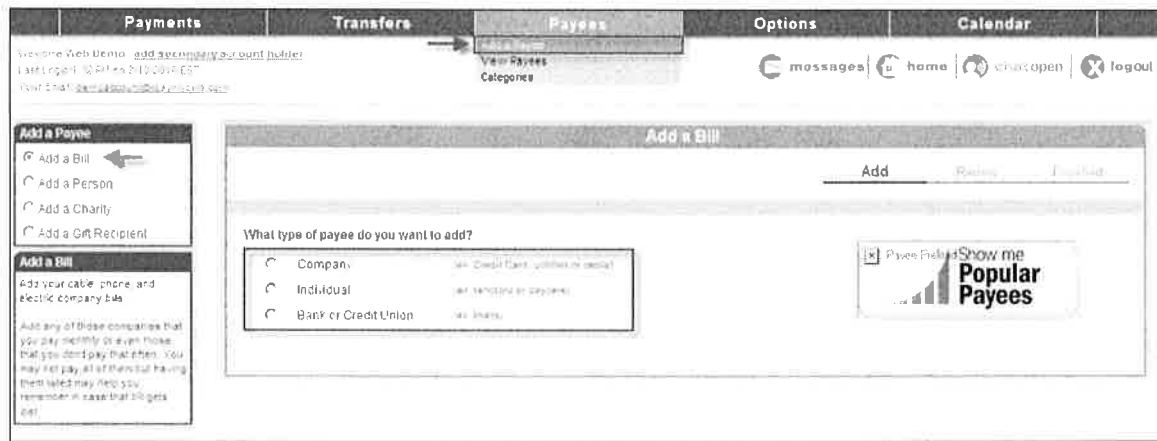
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## **Section Four**

### **Payees Tab**

**Add a Payee – Add a Bill**

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You can add your payees to your bill pay account by accessing the “Payees” tab. When selecting this tab, select “Add a Payee”. After making this selection you will be presented with the image displayed above. The PLUS product allows you to choose between four different payee types:

1. Add a Bill
2. Add a Person
3. Add a Charity
4. Add a Gift Recipient

When you choose the “Add a Bill” selection you will be presented with 3 payee types to choose from:

1. Company (ex. Credit Card, utilities, cable, etc)
2. Individual (ex. Landlord, daycare, etc)
3. Bank or Credit Union (ex. Loans)

You will see the “Add a Bill – Company” option discussed on the next several pages.

## Add a Payee – Add a Bill – Company

MyPhone Web Demo | [add secondary account holder](#)  
 Last Login: 12/01/2010 10:01  
 Your Email: [addpayee@myphone.com](#)

messages | home | chat open | logout

**Add a Payee**

- ☒ Add a Bill
- ☐ Add a Person
- ☐ Add a Charity
- ☐ Add a Gift Recipient

Add your cable, phone, and electric company bills

Add any of those companies that you pay monthly or even those that you don't pay that often. You may not pay all of them but having them listed may help you remember in case that bill gets lost.

**Add a Bill**

Add | Review | Cancel

Payee Name \*

Account Number \*

Confirm Account Number \*

Phone Number \*

Payee Zip Code \*

Account Holder Name

Next

The account number usually appears on your bill or monthly statements to help you identify the company you are a customer of. If you do not have an established account number please include any identifying information under the Account Number field.

Example: Pay to the amount of \$100.00

When selecting the Add a Bill – Company option you will be directed to a screen similar to the image depicted above. On this “Add” screen you must enter the following information related to your payee:

- Payee Name (Formal name from remittance slip/bill)
- Account Number (your account number with this payee)
- Confirm Account Number
- Phone Number (this is the payee’s phone number from remittance slip/bill)
- Payee Zip Code
- Account Holder Name (this will be defaulted to the primary subscriber’s name, but can be changed to reflect the actual name of the person attached to this bill)

After entering this information select the “Next” button.

## Add a Payee – Company - Review

Online Web Demo add secondary account holder  
 Last login: 1:02 PM on 11/15/2010  
 Your First Name: [Name] Last Name: [Name]

Payments Transfers Payees Options Calendar

messages home [User] open logout

### Add a Bill

ADD Review

**We need more information about your payee**

Payee Name: **NOLIN RURAL ELECTRIC COOPERATIVE CORPORATION**  
 Payee Nickname: [NOLIN RURAL ELECTRIC] Payee Address: [Address]  
 Account Number: 147052  
 Phone Number: (270) 272-0500  
 Zip Code: 42701  
 Account Holder Name: Web Demo  
 Payee Category: [No Category]  
 Default Pay From Account: [Primary Checking]

We have assigned a new account with NOLIN RURAL ELECTRIC COOPERATIVE CORPORATION as your payee. The new account number is 147052.

Back Submit Payee

After submitting your payee information you will be directed to the “Review” screen, similar to the image depicted above. From this screen be sure to identify that this is, indeed, the payee that you intend to pay from this bill pay site. Additionally, you may add the following information from this review screen:

- Payee Nickname (this will be defaulted to the formal payee name that you entered, but it can be changed to a name that would enable you to easily identify this payee)
- Payee Category (PLUS product only)
- Default Pay From Account (if you have added multiple pay from accounts, select the appropriate account to pay this bill)

After entering this information and confirming this is the correct payee select the “Submit Payee” button.

## Add a Payee – Company - Finished



## Add a Payee – Add a Bill – Individual - Add

The screenshot shows a web application interface with a top navigation bar containing 'Payments', 'Transfers', 'Payees', 'Options', and 'Calendar'. Below the navigation bar, there is a header area with a welcome message and user information, and a set of navigation links: 'messages', 'home', 'chat: open', and 'logout'. The main content area is titled 'Add a Bill' and contains a form with the following fields and options:

- Tell us about your payee** (Section Header)
- First Name \***: Karen
- Last Name \***: Adams
- Nickname \***: Property Management Rent
- Phone Number \***: 276 - 275 - 2774
- How would you like this payment to be sent?**: ☒ Electronic ☐ Check
- Account Number \***: 11992567
- Confirm Account Number \***: 11992567
- Routing Number \***: 111000814
- Confirm Routing Number \***: 111000814
- Account Type \***: Checking
- Payee Category**: Other
- Default Pay From Account**: Primary Checking

At the bottom of the form are 'Back' and 'Next' buttons. On the right side of the form, there is a security notice: 'For security purposes, we will notify you with a unique alphanumeric code to verify this payee. We will also perform a secure verification process to confirm this payee.' Below this, it states: 'Electronic is the way to go! These payments will be received in about 2 business days.'

After answering your challenge question successfully you will be directed to this “Add” screen. Since you are adding an Individual as a payee you will need to add the following payee information on this screen:

- First Name (of the individual payee)
- Last Name ( of the individual payee)
- Nickname (a name that you can easily recognize)
- Phone Number (this is the individual’s phone number, not yours)
- How would you like this payment to be sent? Electronic —OR— Check
  - If you select “Electronic” you must enter the account and routing number information for the individual. If you select “Check” a mailing address must be entered.
- Account Type (Checking or Savings)
- Payee Category (PLUS only)
- Default Pay From Account

After entering all of this information select the “Next” button.

## Add a Payee – Add a Bill – Individual – Finished

The screenshot shows the 'Add a Bill' screen with a progress bar at the top indicating 'Add' and 'Finished'. The main content area is titled 'Property Management Rent' and displays the following information:

Payee Status	Awaiting Activation
Payee Address	123 SEA SHORE DRIVE ELIZABETHVILLE, KY 42701
Payee Category	Utilities
Default Pay From	Primary Checking

Below this information, there are links: 'What would you like to do next?', 'Schedule a Payment to this payee', 'Edit Payee', 'Add a secondary payee', and 'Add a reminder for this payee'. On the right side, a message states: 'Your new payee is ready for activation. For security purposes please request an Activation Code to verify this payee before sending payments. By clicking Activate Payee Now, you will be asked to complete the following within the same session:'

1. Select delivery method for Activation Code
2. Enter the Activation Code upon receipt

Once the Activation Code has been submitted, your payments will be free to process. An 'Activate Payee Now' button is located at the bottom right.

After entering your Individual payee information and selecting "Next" you will be direct to the "Finished" screen, similar to the image displayed above. Your individual payee will now be "Awaiting Activation". You may initiate the activation process from this screen, or you can complete the activation at a later time from your Home Page or View Payees page.

If you choose the "Activate Payee Now" button you will be directed to the next several screens.

### Add a Payee – Activation Code Request

The screenshot shows the 'Activation Code Delivery Method Required' screen with a progress bar at the top indicating 'Request Code', 'Return', and 'Finished'. The main content area is titled 'Request Activation Code' and asks: 'How would you like to receive the Activation Code for Property Management Rent?'. Below this, it says 'Please select a preferred delivery method.' and lists three options:

- Phone Call:**
  - ☐ Home: (###) ###-2131 [Update](#)
  - ☐ Work: Not on file [Update](#)
  - ☐ Mobile: Not on file [Update](#)
- Email Address:**
  - ☐ Primary: demoaccount@ipaym,bills.com [Update](#)
  - ☐ Secondary: Not on file [Update](#)
- Text Message:**
  - ☐ 2703005993@cingularma.com [Update](#)

A 'Request Code Now' button is located at the bottom center.

You may choose to receive your Activation code by a phone call, to your email address, or by text message. After selecting your preferred delivery method, select the "Request Code Now" button.

### Add a Payee – Activate

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Payments Transfers Payees Options Calendar

Welcome Web Demo [add secondary account holder](#)  
Last Login 3:11 PM on 2/10/2010 EST  
Your Email [demoaccount@ipaymybills.com](#)

messages home activate open logout

Activation Code Request Received

Request Code Activate Finished

**Activate Payee** Please activate Property Management Rent by entering your code below

Your activation code should arrive within moments. Please remain in session while the Activation Code is being sent to [demoaccount@ipaymybills.com](#).

[Click here](#) if you do not receive a code or would like a new one

Please wait...

Enter Activation Code:

Back Submit

After you select "Request Code Now" you will be directed to the "Activate" screen displayed in the image above. Please note the following:

- Your activation code will be sent to you within a few moments
- Remain in your bill pay session until you enter the code; if you leave your current bill pay session before entering the code you will have to request a new code be sent because the original code sent will be deactivated
- After receiving your code enter it in the space provided (Enter Activation Code field)
- Select the "Submit" button

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**Add a Payee – Finished**



Payments	Transfers	Payees	Options	Calendar										
<p>Wellcome Web Demo: <a href="#">Add a secondary account holder</a></p> <p>Last Login: 3/11/2014 3:10:00 PM EST</p> <p>Your Email: <a href="#">Send me a copy of my bill</a></p> <p><a href="#">messages</a>   <a href="#">home</a>   <a href="#">chat open</a>   <a href="#">logout</a></p>														
<p align="center"><b>Payee Verified</b></p> <p align="right"><a href="#">Back to Home</a>   <a href="#">Add a New Payee</a>   <b>Finished</b></p>														
<p><b>KAREN ROBERTS</b></p> <table border="0"> <tr> <td>Payee Status</td> <td>Active</td> </tr> <tr> <td>Payee Address</td> <td>123 MAIN STREET ELIZABETH NJ, NJ 07201</td> </tr> <tr> <td>Payee Category</td> <td>No Category</td> </tr> <tr> <td>Default Pay From Account</td> <td>Primary Checking</td> </tr> <tr> <td>Your Email Address</td> <td>denroaccount@njia.mysbri.com</td> </tr> </table> <p>What would you like to do next?</p> <p><a href="#">Schedule a payment to this payee</a></p> <p><a href="#">Edit a payee</a></p> <p><a href="#">Add another payee</a></p> <p><a href="#">Add a reminder for this payee</a></p>					Payee Status	Active	Payee Address	123 MAIN STREET ELIZABETH NJ, NJ 07201	Payee Category	No Category	Default Pay From Account	Primary Checking	Your Email Address	denroaccount@njia.mysbri.com
Payee Status	Active													
Payee Address	123 MAIN STREET ELIZABETH NJ, NJ 07201													
Payee Category	No Category													
Default Pay From Account	Primary Checking													
Your Email Address	denroaccount@njia.mysbri.com													
<p align="right"><b>Your new payee has been added.</b> Please allow 5 days for your check payments to reach the payee.</p>														


After adding and reviewing your payee information you will be directed to this “Finished” screen. You may schedule your first payment to this newly added payee. This “Finished” page will also inform you how long you should allow for payments to reach this payee, and whether the payment will be sent electronically or by check.

### Add a Payee – Add a Bill – Bank or CU

Payments	Transfers	Payees	Options	Calendar		
<p>Wellcome Web Demo: <a href="#">Add a secondary account holder</a></p> <p>Last Login: 3/11/2014 3:10:00 PM EST</p> <p>Your Email: <a href="#">Send me a copy of my bill</a></p> <p><a href="#">messages</a>   <a href="#">home</a>   <a href="#">chat open</a>   <a href="#">logout</a></p>						
<p align="center"><b>Add a Bill</b></p> <p align="right"><a href="#">Add</a>   <a href="#">Home</a>   <a href="#">Finished</a></p>						
<table border="0"> <tr> <td style="vertical-align: top;"> <p><b>Add a Payee</b></p> <ul style="list-style-type: none"> <li><input checked="" type="radio"/> Add a Bill</li> <li><input type="radio"/> Add a Person</li> <li><input type="radio"/> Add a Charity</li> <li><input type="radio"/> Add a Gift Recipient</li> </ul> <p><b>Add a Bill</b></p> <p>Add your cable, phone, and electric company bills.</p> <p>Add any of those companies that you pay monthly or even those that you don't pay that often. You may not pay all of them but having them listed may help you remember in case that bill gets lost.</p> </td> <td style="vertical-align: top;"> <p>Is this account at Learning and Development?</p> <p><input type="radio"/> Yes</p> <p><input type="radio"/> No</p> </td> </tr> </table>					<p><b>Add a Payee</b></p> <ul style="list-style-type: none"> <li><input checked="" type="radio"/> Add a Bill</li> <li><input type="radio"/> Add a Person</li> <li><input type="radio"/> Add a Charity</li> <li><input type="radio"/> Add a Gift Recipient</li> </ul> <p><b>Add a Bill</b></p> <p>Add your cable, phone, and electric company bills.</p> <p>Add any of those companies that you pay monthly or even those that you don't pay that often. You may not pay all of them but having them listed may help you remember in case that bill gets lost.</p>	<p>Is this account at Learning and Development?</p> <p><input type="radio"/> Yes</p> <p><input type="radio"/> No</p>
<p><b>Add a Payee</b></p> <ul style="list-style-type: none"> <li><input checked="" type="radio"/> Add a Bill</li> <li><input type="radio"/> Add a Person</li> <li><input type="radio"/> Add a Charity</li> <li><input type="radio"/> Add a Gift Recipient</li> </ul> <p><b>Add a Bill</b></p> <p>Add your cable, phone, and electric company bills.</p> <p>Add any of those companies that you pay monthly or even those that you don't pay that often. You may not pay all of them but having them listed may help you remember in case that bill gets lost.</p>	<p>Is this account at Learning and Development?</p> <p><input type="radio"/> Yes</p> <p><input type="radio"/> No</p>					

When adding a Bill as a “Bank or Credit Union” you will be posed with the question, “Is this account at your Financial Institution?” Answer “Yes” or “No” to proceed with adding the bank or credit union.

### Add a Payee – Add a Bill – Yes – Bank or CU

Payments	Transfers	Payees	Options	Calendar
<p>Welcome Web Demo <a href="#">add secondary account holder</a></p> <p>Last Login: 9:42 AM on 5/31/2010 EST</p> <p>Your Email: <a href="#">darrinaccount@lscs.org/bills.html</a></p>				
<div>  <p>Do you like what you see? Click here to enroll in online bill pay.</p> </div> <div> <a href="#">messages</a>   <a href="#">home</a>   <a href="#">chat open</a> </div>				
<div> <div> <p><b>Add a Payee</b></p> <ul style="list-style-type: none"> <li><input checked="" type="radio"/> Add a Bill</li> <li><input type="radio"/> Add a Person</li> <li><input type="radio"/> Add a Charity</li> <li><input type="radio"/> Add a Gift Recipient</li> </ul> </div> <div> <p>Add your cable, phone, and electric company bills</p> <p>Add any of those companies that you pay monthly or even those that you don't pay that often. You may not pay all of them but having them listed may help you remember in case that bill gets lost.</p> </div> </div> <div> <p><b>Add a Bill</b></p> <p><a href="#">Add</a> <a href="#">Review</a> <a href="#">Finished</a></p> <hr/> <p>Is this account at Learning and Development?</p> <p> <input checked="" type="radio"/> Yes  <input type="radio"/> No         </p> <p>What is the account type?</p> <div> <p>Select Account Type ▼</p> <p>Select Account Type</p> <ul style="list-style-type: none"> <li>Loan</li> <li>Credit Card</li> <li>Checking</li> <li>Savings</li> </ul> </div> </div>				

When answering "Yes", you will be prompted to select an account type; choose from the following:

- Loan
- Credit Card
- Checking
- Savings

**Add a Payee – Add a Bill – Yes – Bank or CU - Loan**

Payments Transfers **Payees** Options Calendar

Welcome Web Demo [add secondary account holder](#)  
 Last Login: 8:42:41 on 5/31/2010 EST  
 Your Email: [sarah.pope@webdemos.com](#)

**enroll now**  
 click here

Do you like what you see?  
 Click here to enroll in  
 online bill pay.

messages home chat open

**Add a Payee**

- ☒ Add a Bill
- ☐ Add a Person
- ☐ Add a Charity
- ☐ Add a Gift Recipient

Add your cable, phone, and electric company bills.

Add any of those companies that you pay monthly or even those that you don't pay that often. You may not pay all of them but having them listed may help you remember in case that bill gets lost.

**Add a Bill**

Add Review Finished

Payee Name \* Learning and Development

Account Number \* 123123

Confirm Account Number \* 123123

Phone Number \* 270 - 541 - 2359

Payee Zip Code \* 42701

Account Holder Name Web Demo

Next

The account number usually appears on your bill or monthly statement to help the merchant recognize you as a customer. If you do not have an existing account number, please include any identifying information within the Account Number field.

Example: Pay to the account of John Doe

If you select "Loan" from the Account Type drop down menu you will be directed to the "Add" screen. You should enter the following information on this screen:

- Payee Name (from the bill/remittance slip)
- Account Number (your account number with the payee)
- Confirm Account Number
- Phone Number (payee's phone number)
- Payee Zip Code
- Account Holder Name (the name of the person attached to this bill)

After entering this information select the "Next" button

**Add a Bill**
Add    Finished

**We need more information about your payee**

Who do you want to pay?

Payee Name	Learning and Development	Organize your bills with categories
Payee Nickname *	Learning and Development ⓘ	No Category ▼
Account Number	123123	
Phone Number	(270) 541-2369	Set a default pay from account
Account Holder Name	Web Demo	Primary Checking ▼ ⓘ

We did not find your payee in our database. Please provide us with the additional information requested and you will be one click away from scheduling a payment.

For security purposes, we will supply you with a unique Activation Code to verify this payee. We will also perform a secure validation process to confirm this payee.

Where should we send the payment?

Payee Address \*

City \*

Elizabethtown

Kentucky

42701

When the system is unable to locate your payee you will be presented with the “We need more information about your payee” screen, displayed above. On this screen you should first enter the following:

- Payee Nickname (a name that will help you identify this payee)
- Category (PLUS product only)
- Default pay from account (the account that will be used to pay this payee)

Next you will be asked, “Where should we send the payment?” Please enter the following information:

- Payee Address
- City

After entering this information please select the “Next” button.

**Add a Payee – Add a Bill – Yes – Bank or CU – Loan - Finished**

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Payments	Transfers	Payees	Options	Calendar										
<p>Welcome Web Demo: <a href="#">add secondary account holder</a></p> <p>Last Login: 8:42 AM on 5/21/2010 EST</p> <p>Your Email: <a href="#">dennis@connecticutbill.com</a></p>														
<div> <div> <b>Enroll now</b>  <small>click here</small> </div> <div> <p>Do you like what you see?</p> <p><a href="#">Click here to enroll in online bill pay.</a></p> </div> </div> <div> </div> <div> <a href="#">messages</a>   <a href="#">home</a>   <a href="#">christopan</a> </div>														
<div> <div> <a href="#">Printer Friendly Version</a> </div> <div> <a href="#">Add</a>   <a href="#">Review</a>   <b>Finished</b> </div> </div> <div> <h3>Learning and Development</h3> <table> <tr> <td>Lender Status</td> <td>Awaiting Activation</td> </tr> <tr> <td>Account Number</td> <td>123123</td> </tr> <tr> <td>Account Type</td> <td>Loan</td> </tr> <tr> <td>Payee Category</td> <td>No Category</td> </tr> <tr> <td>Default Pay From</td> <td>Primary Checking</td> </tr> </table> <p>What would you like to do next?</p> <p><a href="#">Schedule a Payment to this payee</a></p> <p><a href="#">Edit Payee</a></p> <p><a href="#">Add Another Payee</a></p> <p><a href="#">Add a Remittance Code</a></p> </div> <div> <p>Your new payee is ready for activation.</p> <p>For security purposes please request an Activation Code to verify this payee before sending payments. By clicking <a href="#">Activate Payee Now</a>, you will be asked to complete the following within the same session:</p> <ol style="list-style-type: none"> <li>1. Select delivery method for Activation Code.</li> <li>2. Enter the Activation Code upon receipt.</li> </ol> <p>Once the Activation Code has been submitted, your payments will be free to process.</p> <p><a href="#">Activate Payee Now</a></p> </div>					Lender Status	Awaiting Activation	Account Number	123123	Account Type	Loan	Payee Category	No Category	Default Pay From	Primary Checking
Lender Status	Awaiting Activation													
Account Number	123123													
Account Type	Loan													
Payee Category	No Category													
Default Pay From	Primary Checking													

After submitting the mailing address from the previous screen you will be directed to the “Finished” screen. Your payee is now in “Awaiting Activation” status; please select the “Activate Payee Now” button to initiate the activation code process.

After you complete the activation code process your payee will be “Active” and able to have payments sent to it.

## Add a Payee – Add a Bill – No – Bank or CU

PaymentsTransfersPayeesOptionsCalendar

Web Demo add secondary account holder  
Last Login: 11:11 AM on 11/10/11  
Your Email: user@example.com | Password: 123456

messageshomechat openlogout

Add a Payee

☒ Add a Bill

☐ Add a Person

☐ Add a Credit

☐ Add a Gift Recipient

Add your cable, phone, and electric company bills.

Add any of these companies that you pay monthly or even those that you don't pay that often. You may not use all of them but having them listed may help you remember in case that bill gets lost.

Add a Bill

Add

Cancel

Save

Is this account at Learning and Development?

☐ Yes

☒ No

What is the account type?

Select Account Type

Select Account Type

Loan

Credit Card

Checking

Savings

When answering “No”, you will be prompted to select an account type; choose from the following:

- Loan
- Credit Card
- Checking
- Savings

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## Add a Payee – Add a Bill – No – Bank or CU – Credit Card

The screenshot shows a web application interface with a top navigation bar containing 'Payments', 'Transfers', 'Payees', 'Options', and 'Calendar'. Below the navigation bar, there is a header area with a welcome message, a timestamp, and links for 'messages', 'home', 'direct open', and 'logout'. The main content area is titled 'Add a Payee' and contains a sidebar with options: 'Add a Bill' (selected), 'Add a Person', 'Add a Charity', and 'Add a Gift Recipient'. The 'Add a Bill' section is active, showing a form with the following fields: 'Payee Name \*' (US Bank, USA), 'Account Number \*' (1234567891234567), 'Confirm account number \*' (1234567891234567), 'Phone Number \*' (224-214-0000), 'Payee Zip Code \*' (4701), and 'Account Holder Name' (Jill Demo). A 'Next' button is at the bottom. A sidebar on the left provides instructions for adding bills and a note about account numbers. A right sidebar contains a disclaimer about the account number and a link to 'Pay on the account of John Doe'.

If you select “Credit Card” from the Account Type drop down menu you will be directed to the “Add” screen. You should enter the following information on this screen:

- Payee Name (from the bill/remittance slip)
- Account Number (your account number with the payee)
- Confirm Account Number
- Phone Number (payee’s phone number)
- Payee Zip Code
- Account Holder Name (the name of the person attached to this bill)

After entering this information select the “Next” button.

## Add a Payee – Add a Bill – No – Bank or CU- Credit Card

The screenshot shows a web form titled "Add a Bill" with a progress bar at the top indicating "Add" and "Finished" steps. The main heading is "We need more information about your payee". Below this, there are two columns of input fields. The left column contains: "Who do you want to pay?" (Payee Name: US Bank VISA, Payee Nickname: US Bank VISA, Account Number: 1234567891234567, Phone Number: (224) 214-0887, Account Holder Name: Web Demo). The right column contains: "Organize your bills with categories" (Credit Cards), "Set a default pay from account" (Primary Checking), and a security notice. Below these is the "Where should we send the payment?" section with fields for "Payee Address" (147 Main Street), "City" (Elizabethtown), and "State/Zip" (Kentucky 42701). At the bottom are "Back" and "Next" buttons.

**Add a Bill**

Progress: Add Finished

**We need more information about your payee**

Who do you want to pay?

Payee Name: US Bank VISA

Payee Nickname \*: US Bank VISA

Account Number: 1234567891234567

Phone Number: (224) 214-0887

Account Holder Name: Web Demo

Organize your bills with categories: Credit Cards

Set a default pay from account: Primary Checking

Where should we send the payment?

Payee Address \*: 147 Main Street

City \*: Elizabethtown

State: Kentucky

Zip: 42701

Back Next

When the system is unable to locate your payee you will be presented with the “We need more information about your payee” screen, displayed above. On this screen you should first enter the following:

- Payee Nickname (a name that will help you identify this payee)
- Category (PLUS product only)
- Default pay from account (the account that will be used to pay this payee)

Next you will be asked, “Where should we send the payment?” Please enter the following information:

- Payee Address
- City

After entering this information please select the “Next” button.



## Add a Payee Finished - Credit Card

The screenshot shows a web application interface with a top navigation bar containing 'Payments', 'Transfers', 'Payees', 'Options', and 'Calendar'. Below the navigation bar, there is a user information section on the left and a main content area on the right. The main content area is titled 'Add a Bill' and has a 'Finished' status. It displays details for a 'US Bank VISA' payee, including its status as 'Awaiting Activation', account number, type, category, and default payment method. A list of actions is provided at the bottom left, and a confirmation message with an 'Activate Payee Now' button is on the right.

Add a Bill	
<b>US Bank VISA</b>	
Lender Status	Awaiting Activation
Account Number	1214567891234567
Account Type	Loan
Payee Category	Credit Cards
Default Pay From	Primary Checking
What would you like to do next?	
<a href="#">Schedule a Payment to this payee</a>	
<a href="#">Edit a Payee</a>	
<a href="#">Add a New Payee</a>	
<a href="#">Go to Home Page</a>	
Your new payee is ready for activation. For security purposes please request an Activation Code to verify this payee before sending payments. By clicking <b>Activate Payee Now</b> , you will be asked to complete the following within the same session: 1. Select delivery method for Activation Code 2. Enter the Activation Code upon receipt Once the Activation Code has been submitted, your payments will be free to process.	
<a href="#">Activate Payee Now</a>	

After submitting the mailing address from the previous screen you will be directed to the “Finished” screen. Your payee is now in “Awaiting Activation” status; please select the “Activate Payee Now” button to initiate the activation code process.

After you complete the activation code process your payee will be “Active” and able to have payments sent to it.

## Add a Payee – Add a Bill - Add a Checking Account - NO

Payments Transfers **Payees** Options Calendar

Prepense Web Demo: [add secondary account holder](#)  
Last Login: 3/14/2011 5:10:21 PM  
Email: [prepense@prepense.com](mailto:prepense@prepense.com)

messages home open logout

**Add a Payee**

- ☒ Add a Bill
- ☐ Add a Person
- ☐ Add a Charity
- ☐ Add a Gift Recipient

Add your cable, phone and electric company bills.

Add any of these companies that you pay monthly or even those that you don't pay that often. You may not pay all of them but having them listed may help you remember in case that bill gets lost.

**Add a Bill**

Add Review Finished

Is this account at Learning and Development?

☐ Yes  
☒ No

What is the account type?

To submit this request, go to [Add Transfer Account](#)

The account number usually appears on your bill or monthly statement to help this request. If you do not have an account number, please include any identifying information including Account Number type.

Example: Pay to the account type

When you answer “No” to the question, “Is this account at...?” you will see the following statement appear on your “Add” screen:

*To submit this request, go to Add Transfer Account*

Making a payment to an external financial institution is handled through the “Transfers” process in your bill pay site.

## Add a Payee – Add a Person – Add

The screenshot shows a web interface for adding a payee. At the top, there are tabs for Payments, Transfers, Payees, Options, and Calendar. Below the tabs, there are links for messages, home, and a full screen option, along with a logout button. On the left side, there is a sidebar with a section titled 'Add a Payee' containing radio buttons for 'Add a Bill', 'Add a Person' (which is selected), 'Add a Charity', and 'Add a Gift Recipient'. Below this is a 'Person' section with a description: 'Pay the lawn person, babysitter, or any person you may owe with end-of-payments. Your new email payee will be added in pending status awaiting confirmation. Once both you and your recipient have completed the confirmation, the payment will be processed on the scheduled business day.' The main content area is titled 'Add a Person' and has a sub-header 'Add'. It contains a note: 'For security purposes, we will supply you with a unique Activation Code to verify this payee.' Below this, there are input fields for 'Payee First Name' (containing 'Bay'), 'Payee Last Name' (containing 'Smith'), and 'Payee Phone Number' (containing '224 327 2774'). There is also a note: 'An email will be sent to this payee to be authenticated.' Below this, there are input fields for 'Payee Email Address' (containing 'csmith@mail.com') and 'Confirm Payee Email Address' (containing 'csmith@mail.com'). At the bottom of the form, there is a 'Next' button.

You will be able to “Add a Person” in your bill pay site. On the “Add” screen, please enter the following information:

- Payee First Name
- Payee Last Name
- Payee Phone Number
- Payee Email Address
- Confirm Payee Email Address

An email will be sent to the person you are adding as a payee. This email will be authenticated by the person you are adding to complete the setup process.

After entering this information, please select the “Next” button.

## Add a Payee – Add a Person – Keyword

The screenshot shows the 'Add a Person' form in the 'Payees' tab. The 'Add' tab is selected. The 'Keyword' field contains 'Mona Lisa' and the 'Confirm Keyword' field also contains 'Mona Lisa'. Below the fields, there is a 'Back' button and a 'Next' button. To the right of the fields, there is a text box explaining the keyword requirement: 'To the left please provide us with a keyword. A keyword is simply a single word known only to you and your email payee. It will be something you choose. This keyword will be used to help you find the payee you are adding. It will be used to help you find the payee you are adding. It will be used to help you find the payee you are adding.'

Next, enter a “Keyword” and confirm. This keyword is simply a single word known only to you and your payee; it can be anything you choose. Please communicate this keyword to your payee, preferably by a phone call, prior to completing the setup process. Your payee will be asked to enter this keyword during their email authentication process. After entering the keyword please select the “Next” button.

## Add a Payee – Add a Person – Review

The screenshot shows the 'Add a Person' form in the 'Payees' tab. The 'Review' tab is selected. The form displays the following information: Payee: Billy Smith, Email Address: bsmith@mail.com, Payee Status: Requires Activation, Payee Nickname: Billy Smith, Phone Number: (224) 627-2774, Payee Category: Tax Category, Default Pay From Account: Primary Checking, Keyword: Mona Lisa, Your email address: demoaccount@paymibills.com. At the bottom, there are 'Edit' and 'Submit Person' buttons.

When directed to this “Review” screen you will be able to view the payee name, email address, and phone number as well as the Keyword that you created. You will also be able to create a “Payee Nickname” for this payee, select the “Default Pay From Account”, and select a “Category” (PLUS only) for this payee. After entering this information and reviewing all entered information, please select the “Submit Person” button.

## Add a Payee – Add a Person – Request Activation Code

Payments Transfers Payees Options Calendar

Welcome Web Demo [add secondary account holder](#)  
Last Login: 11/11/2014 10:00 AM EST  
Your Email: [demoaccount@ipaymibile.com](#)

[Click Here to Activate Payee](#) [messages](#) [home](#) [chat open](#) [logout](#)

### Add a Person

[Add](#) [Review](#) [Finished](#)

**Billy Smith**  
Payee Status: **Requires Activation** ⓘ  
Email Address: **bsmith@gmail.com**  
Phone Number: **+2241627-2774**  
Payee Category: **No Category**  
Default Pay Form: **Primary Checking**  
Your Email Address: **demoaccount@ipaymibile.com**

**Your new payee is ready for activation.**  
For security purposes please request an Activation Code to verify this payee before sending payments. By clicking Activate Payee Now, you will be asked to complete the following within the same session:  
1. Select delivery method for Activation Code  
2. Enter the Activation Code upon receipt.  
Once the Activation Code has been submitted, your payments will be free to process.

[Request Activation Code Now](#)

What would you like to do next?  
[Schedule Payment to this payee](#)  
[Add a Payee](#)  
[Cancel Payment](#)  
[Add a Payment to this payee](#)

To begin the activation process you will first need to request and submit an accurate Activation Code. Please select the “Activate Payee Now” button to begin this process.

## Add a Payee - Add A Person - Request Activation

Payments Transfers Payees Options Calendar

Welcome Web Demo [add secondary account holder](#)  
Last Login: 11/11/2014 10:00 AM EST  
Your Email: [demoaccount@ipaymibile.com](#)

[Click Here to Activate Payee](#) [messages](#) [home](#) [chat open](#) [logout](#)

### Activation Code Delivery Method Required

[Request Code](#) [Cancel](#) [Back](#)

**Request Activation Code**  
How would you like to receive the activation code for Billy Smith?

Please select a preferred delivery method

**Phone Call:**  
☐ Home: (888) 888-1131 [Update](#)  
☐ Work: Not on file [Update](#)  
☐ Mobile: Not on file [Update](#)

**Email Address:**  
☐ Primary: [demoaccount@ipaymibile.com](#) [Update](#)  
☐ Secondary: Not on file [Update](#)

**Text Message:**  
☐ 2703005955@angularme.com [Update](#)

[Request Code Now](#)

Your current contact information will be displayed on this “Request Activation Code” screen. Please select your preferred delivery method and select the “Request Code Now” button.

## Add a Payee- Add a Person – Enter Code

The screenshot shows a web application interface with a top navigation bar containing tabs for Payments, Transfers, Payees, Options, and Calendar. Below the navigation bar, there is a user welcome message and a list of links including messages, home, chat open, and logout. A sticky note on the left side of the page reads 'Click here to Activate Payee'. The main content area is titled 'Activation Code Request Received' and features a sub-header 'Activate Payee'. The text 'Please activate Billy Smith by entering your code below' is displayed. A message states: 'Your activation code should arrive within moments. Please remain in session while the Activation Code is being sent to 2703005986@angularme.com'. A link is provided: 'Click Here if you do not receive a code or would like a new one'. On the right side, there is a 'Please wait...' indicator and a text input field labeled 'Enter Activation Code' with four asterisks. At the bottom, there are 'Back' and 'Submit' buttons.

Please remain in your current bill pay session while the activation code is being sent to you. After receiving the 4-digit code, please enter it into the “Enter Activation Code” field. After successfully entering the code, please select the “Submit” button.

## Add a Payee - Add a Person - Finished

The screenshot shows a web application interface with a top navigation bar containing 'Payments', 'Transfers', 'Payees', 'Options', and 'Calendar'. Below the navigation bar, there is a header area with a 'Welcome Web Demo' message and a link to 'Add secondary account holder'. The main content area is titled 'Payee Verified' and includes a sub-header 'Payee Verified' and a 'Finished' status. The main content is divided into two columns. The left column, titled 'Awaiting Action By BILLY SMITH', lists the following information: Email address: bsmith@gmail.com, Phone Number: 2246272774, Payee Category: No Category, and Your Email Address: demoaccount@ipaymybills.com. The right column, titled 'Important Next Steps', states that BILLY SMITH must respond to an activation email before the first payment will process. It lists two steps: 1. Security Keyword (first screen) and 2. Account Information (second screen). Below this, it notes that successful completion of this one-time activation will allow payments to process freely. At the bottom, there is a section titled 'What would you like to do next?' with three links: 'Schedule a payment to this payee', 'Edit a payee', and 'Add another payee'.

Awaiting Action By BILLY SMITH	
Email address	bsmith@gmail.com
Phone Number	2246272774
Payee Category	No Category
Your Email Address	demoaccount@ipaymybills.com

**Important Next Steps**  
BILLY SMITH must respond to an activation email before the first payment will process. By clicking the email link, BILLY SMITH will be asked to submit the following on our secure site:

1. Security Keyword (first screen)
2. Account Information (second screen)

Successful completion of this one-time activation will allow payments to process freely.

**What would you like to do next?**

- [Schedule a payment to this payee](#)
- [Edit a payee](#)
- [Add another payee](#)

With your activation process complete, you must now wait for your payee to respond to the activation email that will be sent to them. The payee will be asked to submit the following information:

- Keyword (this is the word that you created during the setup process)
- Account Information (the payee's account number and routing number)

After the payee successfully completes these two steps of the one-time activation process, payments to the payee will be able to process freely.