



STEP-BY-STEP GUIDE: Online Banking - *How to set up and navigate eBills*

The following step-by-step guide was developed to assist you in enrolling an existing payee in eBills and navigating around eBills. You can also contact us at 855.855.8805.

Please note that not all businesses are eBills-eligible.

- 1) Once you land on the BillPay screen in Online Banking, click on the “Payees” tab:

Bill Pay

[+ New Payee](#) [Help](#)

Quick Multi Classic Scheduled History **Payees**

Active Payees [View All](#)

Search active payees

All **Businesses** People

AAA Membership

LAST No Payment History
NEXT None Scheduled

Amount

Payment Options

From Account Dividend Rewards Checking

Deliver By

April 2018

SU	MO	TU	WE	TH	FR	SA
1	2	3	4	5	6	7



STEP-BY-STEP GUIDE: Online Banking -

How to set up and navigate eBills

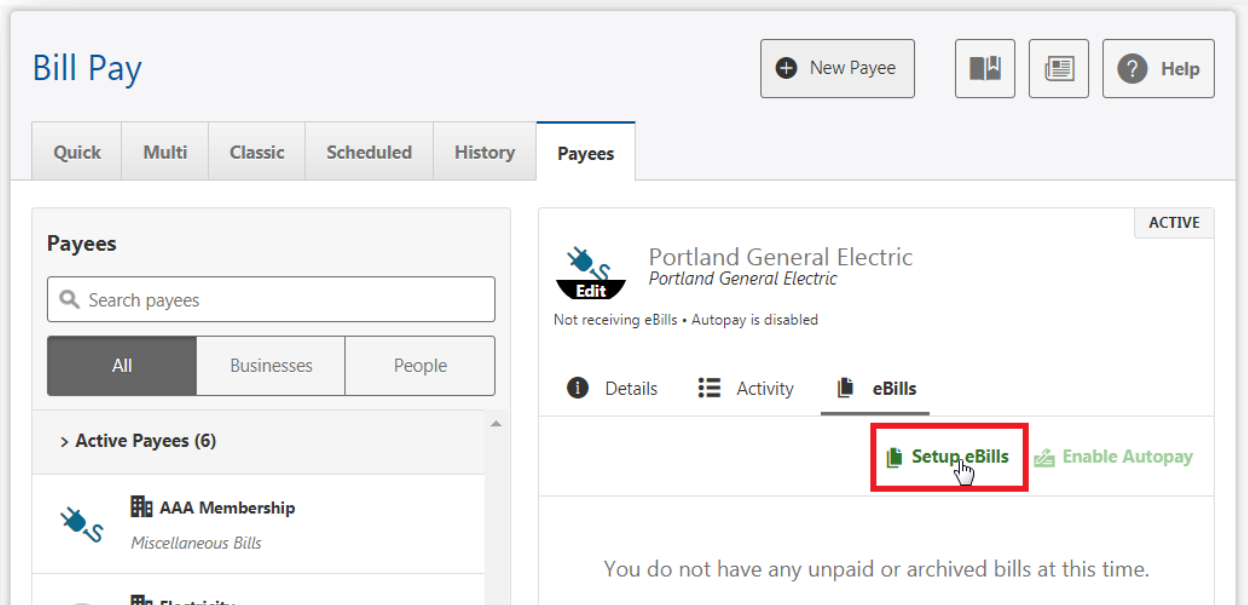
- 2) We're using Portland General Electric in this example as the payee we want to enroll in eBills. Click on the corresponding tab for the payee, then click on "eBills":

The screenshot displays the 'Bill Pay' interface. On the left sidebar, there are navigation buttons for DASHBOARD, ACCOUNTS, BILL PAY (highlighted), and TRANSFER. The main area is titled 'Bill Pay' and includes tabs for Quick, Multi, Classic, Scheduled, History, and Payees. The 'Payees' tab is active, showing a list of payees under 'Active Payees (6)'. The payees listed are AAA Membership, Electricity, Gym Membership, Jane Doe, Portland General Electric (highlighted with a red box), and Rental Car. The 'Portland General Electric' entry is categorized as 'Utilities'. To the right of the list, the 'eBills' tab for this payee is highlighted with a red box. The right-hand panel shows the 'Payee Information' for Portland General Electric, including Nickname, Payee Category, Account Number, and Address. The 'eBills' tab is selected, and the 'Deactivate' and 'Delete Payee' buttons are visible.



STEP-BY-STEP GUIDE: Online Banking - *How to set up and navigate eBills*

3) Click on “Setup eBills”:



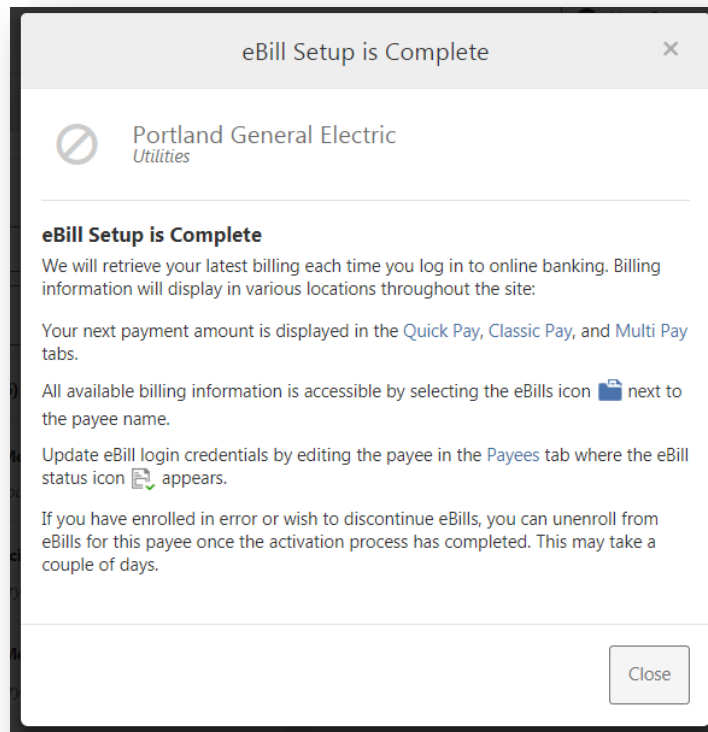
4) A popup screen will appear. Enter the login credentials you have for PGE’s online account access:

The screenshot shows a 'Begin eBill Enrollment' popup window for 'Portland General Electric Utilities'. It contains a 'Verify Your Account' section with a text explanation: 'We will use your information to retrieve your billing information. To retrieve your billing information, your biller may require validation of your username and password for their site. This is required by the biller and is required only to obtain an eBill. If you do not feel comfortable providing such information, please do not proceed further in attempting to establish an eBill relationship with this biller. For additional information concerning the BillPay system, please see the Terms and Conditions.' Below this, there are two input fields: 'E-Mail Address *' and 'Password *'. At the bottom right, there are 'Close' and 'Continue' buttons.

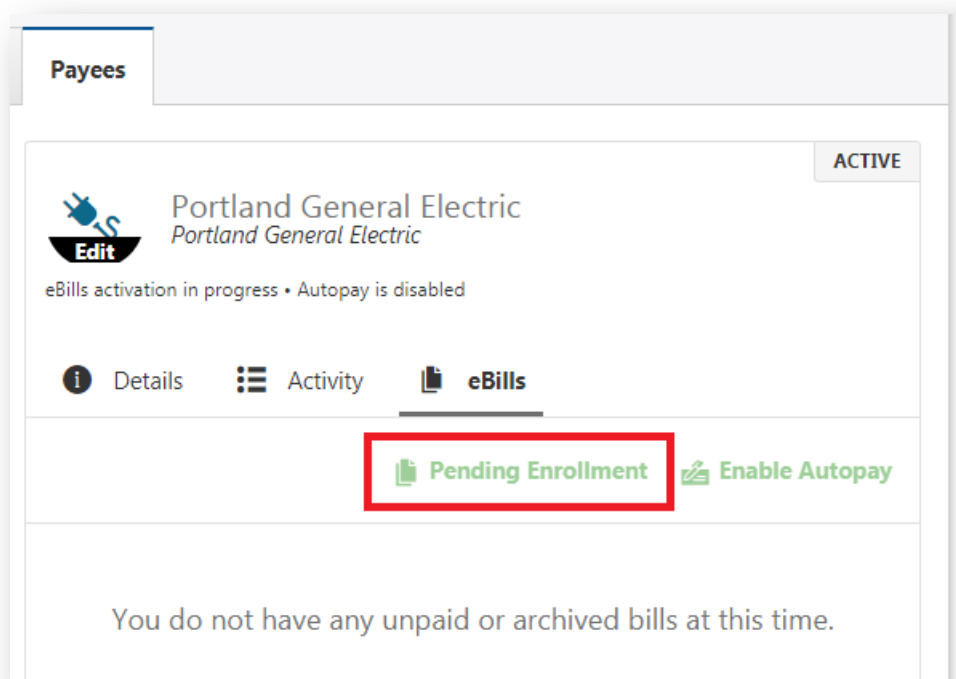


STEP-BY-STEP GUIDE: Online Banking - *How to set up and navigate eBills*

5) This message will appear once your eBill account is set up in First Tech's BillPay:



6) Portland General Electric will appear as "Pending Enrollment" in your Online Banking:





STEP-BY-STEP GUIDE: Online Banking -

How to set up and navigate eBills

- 7) Once the enrollment is successful, you will receive an email from memberservice@firsttechfed.com to notify you of this change to your BillPay account.

Whenever you receive a bill from the enrolled payee, memberservice@firsttechfed.com will also send you an email to alert you that a bill has arrived. You can then choose to pay out of your First Tech Online Banking or schedule a recurring payment with this payee.

- 8) Should your payee's login credentials change, you can modify them in BillPay. Go under the "Payees" tab in BillPay, click on "Change eBill Enrollment":

The screenshot displays the 'Bill Pay' interface. On the left is a sidebar with navigation icons for Dashboard, Accounts, Bill Pay (selected), Transfer, E-Docs, and Message Center. The main area is titled 'Bill Pay' and includes tabs for Quick, Multi, Classic, Scheduled, History, and Payees (selected). Below the tabs is a 'Payees' section with a search bar and filters for All, Businesses, and People. A list of 'Active Payees (4)' is shown, including Arsh School, Electricity Bill, GEICO Insurance, and Liberty Mutual (highlighted in green). To the right, the 'Liberty mutual' payee details are shown, indicating 'Receiving eBills • Autopay is disabled'. The 'eBills' tab is selected, showing a 'Change eBill Enrollment' button (highlighted with a red box) and an 'Enable Autopay' button. Below this is a 'PAID AND ARCHIVED' section with a table showing a due date of DEC 21, 2017, a minimum payment of \$22.00, a balance of \$117.95, and a 'PAID' status.


DUE	AMOUNT	PAYMENT STATUS
DEC 21 2017	Minimum: \$22.00 Balance: \$117.95	PAID





STEP-BY-STEP GUIDE: Online Banking - *How to set up and navigate eBills*

- 9) In this popup screen, you can click on “Update” to enter your new login credentials. This is required if you changed your login credentials in the eBills-eligible payee’s portal or if any changes have been made on the payee end:

Update eBill Enrollment [X]

 **Liberty mutual**
Uncategorized

 **Payee Login**
Update your login information for this payee to ensure you continue to receive eBills. **Update**

 **Unenroll from eBills**
Unenrolling may take a couple of days from the time you first enrolled. **Unenroll**



STEP-BY-STEP GUIDE: Online Banking -

How to set up and navigate eBills

10) Once your eBills is set up, you'll start receiving your bills in First Tech's Online Banking – also an email from memberservice@firsttechfed.com letting you know a bill has arrived. This way, you can manage these bills all in one place.

In this example, we'll show you how to pay a bill for Portland General Electric. Under the "Payees" tab, click on "Pay":

Bill Pay

Quick Multi Classic Scheduled History **Payees**

Payees

Search payees

All **Businesses** People

> Active Payees (5)

- Best Buy Finance Charge
- GMAC Bills & Utilities
- Portland General Electric Bills & Utilities**

Portland General Electric
Portland General Electric *1516
Receiving eBills • Autopay Enabled

Details Activity **eBills**

Change eBill Enrollment Autopay Enabled

PENDING

DUE	AMOUNT	PAYMENT STATUS
MAR 16 2018	Minimum: \$22.00 Balance: \$117.95	UNPAID

Archive **Pay**



STEP-BY-STEP GUIDE: Online Banking -

How to set up and navigate eBills

- 11) The screen will automatically take you to the “Classic” tab with payment details prefilled aiming to help you pay for the Portland General Electric’s due bill. Fill out the rest of the required fields and make sure all information is accurate before clicking on “Submit Payment”:

The screenshot displays the 'Classic' tab in the online banking interface. The left sidebar contains navigation icons for ACCOUNTS, TRANSFER, MESSAGE CENTER, BILL PAY (highlighted), E-DOCS, and MORE... The main content area is divided into two panels: 'Payment Details' and 'Payment Confirmation'.

Payment Details:

- Payee ***: Portland General Electric
- Account ***: First Checking1
- Last Payment**: \$0.07 on 11/29/2017
- Amount ***: 0.00
- Frequency**: One Time
- Deliver By ***: 04/16/2018
- Payment**:
 - Standard Electronic**: ADDITIONAL FEE None, DELIVER BY 4/16/2018
 - Rush Electronic**: ADDITIONAL FEE \$5.00, DELIVER BY 4/13/2018
 - Expedited Check**: ADDITIONAL FEE \$30.00, DELIVER BY 4/13/2018

Payment Confirmation:

- PAYEE**: Portland General Electric
- FROM ACCOUNT**: First Checking1 *6216, Balance \$8,215.97
- AMOUNT**: \$0.00
- DELIVERS**: One Time
- DELIVER BY**: 4/16/2018
- PAYMENT METHOD**: Standard Electronic
- FEE**: None
- MEMO**: (empty)
- Submit Payment**: (Green button)



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12) You'll see a banner message along with a unique confirmation number for your reference:

