

New Participant Onboarding Checklist

Initial Engagement	<ul style="list-style-type: none"> <input type="checkbox"/> Applicant submits a contact request form on ePAY website <input type="checkbox"/> Sales call is scheduled with applicant to review program benefits and options <input type="checkbox"/> Enrollment email with link to the ePAY portal is sent to applicant
Onboarding	<ul style="list-style-type: none"> <input type="checkbox"/> Applicant, using the instructions provided in enrollment email, enters profile data (ePAY team member available to assist) <input type="checkbox"/> Applicant executes the JetPay and ePAY agreements in the ePAY portal <input type="checkbox"/> Participant is boarded on (MAGIC) processing platform and initial setup is complete* <input type="checkbox"/> Training email with link to schedule an appointment sent to Participant. If the Participant requires an integration, the appointment will be to discuss setup needs. **
Testing & Training	<ul style="list-style-type: none"> <input type="checkbox"/> Conduct Training or Onboarding call with Participant. <input type="checkbox"/> Participant requirements developed by ePAY <input type="checkbox"/> End to end testing performed by ePAY and Participant <input type="checkbox"/> Go-Live date established
Go-live	<ul style="list-style-type: none"> <input type="checkbox"/> Participant is converted to production <input type="checkbox"/> ePAY monitors Participant in production <input type="checkbox"/> Participant is live and can contact Customer Support for further questions at 1-(855) 226-7337 or the ticketing portal at: https://epay.jtpyportal.com/Login_Epay.aspx

* Applicant converts to participant status following approval from underwriting

** Training is provided remotely through web tutorials