

## New Participant Onboarding Checklist

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

\* Applicant converts to participant status following approval from underwriting

\*\* Training is provided remotely and through web tutorials