

Approving Second Checking Account

The member will first need to follow the steps in the “Adding Second Bill Pay Account Instructions” instructional PDF. Once they have done so, we can continue with approving or rejecting the second account number.

1. First, log into Bill Pay (Masters) as normal. Then, over on the left-hand side of the homepage, find the option that says “Pending Account” and click on it.



2. If there aren't any accounts to verify it will state that there is nothing pending.

However, if there is something that is pending, it should look something like this:

1 Pending Account(s)	
Subscriber Name	Date ▲
JONES, KYRA	9/7/2022

3. Once you have found the member's name, you will need to click on their name. It will open an additional area as seen in the figure below.

Approve Pending Consumer Accounts

* Denotes a required field

1 Pending Account(s)

Subscriber Name	Date ▲
JONES, KYRA	9/7/2022

Select a pending account from the left to view or edit.

Subscriber Name: KYRA JONES

User ID: [REDACTED]

Account Number: [REDACTED] *

Account Type: Checking ▼ *

Account Name: main

4. You will need to check two things before you approve or deny it.
 - a. Check to make sure that the account number is correct. We will accept either the member number plus suffix (e.g., for member number 123456 we would accept 1234560500) or the draft ID (e.g., 751001234567).
 - b. Check to make sure that the member is on the account they are trying to add.
5. If both criteria are met, you can click on the approve button. If any of the criteria aren't met, click "Reject", and have the member try again with the correct information.
6. Once the account has been approved, you can verify that it was correctly set up by going to the member's Bill Pay profile.

TIP: Once you have approved a second account, you can look up the account with that account number as well as the original account number. For example: The member's initial account number that was enrolled in Bill Pay was 751001234567. The account that was just added is 1234560500. So, in order to pull up the member's Bill Pay profile, you can search with either 751001234567 or 1234560500.

7. Once you are in the member's profile, find the option on the left-hand side that says "View/Edit Bank Account". Click on this to view the account numbers on this person's record.

Subscriber Options	
	Add Bank Account
	View/Edit Bank Account
	View/Edit Transfer Account



8. A page with all the accounts will show up as seen in the figure below. These are all the accounts the member can use to make payments. If you need to delete one of them, you can click “Deactivate” on the right-most side.

View/Edit Subscriber (KYRA JONES)

View or Edit Bank Account Information

Bank Account Nickname	Account No.	Account Type	Status		
SHAREDRAFT CHECKING		Checking	Approved	Edit	Deactivate
test		Checking	Approved	Edit	Deactivate
test		Checking	Rejected	Edit	Deactivate

Back to subscriber search page

Something you might notice is that “rejected” accounts also show up here. If you would like to delete them you may, but they will not show up on the member’s end so it’s optional to do so.

9. Once approved, the member will need to log out and back into Bill Pay and the secondary checking account will be available for use. If you have any further questions, reach out to e-services.