Vision Financial Bill Pay Instructions

Single Payment:

1. Click ***Payments*** tab.
2. Click ***Single Payment***.
3. Choose to ***Pay a Bill***, ***Pay a Person***, ***Transfer Funds***, ***Send a Donation*** or ***Send a Gift Check*** from the left side of the page in the Single Payment window.
4. Select the appropriate category or leave it on "All Categories".
5. Select a Payee from the list in the Payee window.
6. The selected payees will display in the center of the page. Select the account from which the payment should be deducted.
7. Enter the amount you want to pay.
8. Click on the calendar under "Process Date" to select the date to pay this bill on (be sure to check to ensure that the estimated arrival date is before your due date to prevent late fees from the payee).
    a. Click on a date to select it (you'll see the estimated arrival date on the left when the mouse hovers over a date).
    b. If it will not get there soon enough, click ***Rush Payment*** at the bottom of the window.
    c. Choose one of the dates listed (rush payments do involve fees).
    d. Click ***Next***.
    e. Enter requested information.
    f. Click ***Verify Address***.
    g. Review the information and click ***I Agree*** to make the rush payment.
    h. Click ***Submit Delivery***.
9. Click ***Next***
10. Review the information then click ***Submit Payment***.

Sending a Gift Check:

1. Click ***Payments*** tab.
2. Click ***Single Payment***.
3. Choose ***Send a Gift Check*** from the left side of the page in the Single Payment window.
4. Click ***Send a Gift***.
5. Choose a person from the "Select a Recipient" window.
6. Verify pay from account.
7. Enter the amount you want to send (you'll notice a $2.99 fee – this is the fee for the specialty gift check).
8. Click on the calendar beside "Process Date" to select the date to send the check on.
9. Click ***Next***.
10. Select an occasion and view the thumbnails for each one.
11. Click on the one that you would like to use then click ***Next***.
12. Enter the opening, personalized and closing messages then click ***Next***.
13. Click below the "Sample Check" to view your check along with the messages you added.
14. Verify that everything is correct, including your return address then click ***Submit Gift***.

Recurring Payment:

1. Click ***Payments*** tab.
2. Click ***Recurring Payment***.
3. Choose to ***Pay a Bill*** or ***Pay a Person*** from the left side of the page in the Recurring Payment window.
4. Select the appropriate category or leave it on "All Categories".
5. Select a Payee from the "Payee" window.
6. Verify pay from account.
7. Enter the amount you want to pay.
8. Select a frequency from the drop down menu.
9. If applicable, choose the day of the week or date from the second drop down menu.
10. Select ***Pay Before*** or ***Pay After*** in the case of the date falling on a weekend or holiday.
11. Click on the calendar beside "Select First Process Date" and select a date.
12. Choose ***Yes*** or ***No*** beside "Will This Payment Series End?"
    a. If **Yes**, click the calendar beside the text box to select the date that the recurring payments will end **OR**
    b. If **No**, enter the set number of payments before this recurring payment will end.
13. Click ***Next***.
14. Review information then click ***Submit Payment***.

Add a Payee:

1. Click ***Payments*** tab.
2. Click ***Add a Payee***.
3. Make a selection from the "Add a Payee" window.
    a. Add a Bill:

   i. Choose Company, Individual or Bank or Credit Union (you can also click on ***Show Me Popular Payees*** to search for the payee first).
   ii. Enter the requested information.
   iii. Click ***Next***.
   iv. Enter a payee nickname, the payee's address, category, phone number and the default account to be paid from.
   v. Click ***Next***.

b. Add a Person:

   i. Answer your security question.
   ii. Click ***Submit***.
   iii. Enter the payee's information.
   iv. Click ***Next***.
   v. Enter a keyword (keyword must be given to the payee in order for them to accept payment).
   vi. Click ***Next***.
   vii. Choose payee nickname, category and default pay from account.
   viii. Click ***Submit Person***.
   ix. Click ***Activate Payee Now***.
   x. Select your preferred delivery method for the activation code.
   xi. Click ***Request Code Now***.
   xii. Once you receive the activation code, enter it into the text box on the right side of the page.
   xiii. Click ***Submit***.
   xiv. The person will need to respond to the activation email in order to complete the transaction.

c. Add a Charity or Gift Recipient:

   i. Answer your security question.
   ii. Click ***Submit***.
   iii. Enter the requested information.
   iv. Click ***Next***.
   v. Review payee information.
   vi. Click ***Submit Charity/Recipient***.

Use the Shortcut:

1. From the "Home" page, click ***Take the Shortcut*** in the center of the page.
2. Your bills will be preloaded based on your payment history.
3. If you need to add other payees just click on each one from the "Select Payee" window.
4. Select the account from which the payment should be deducted.
5. Enter the amount.
6. Click the calendar to choose a "Process Date".
7. Click ***Next***.
8. Review the information then click ***Submit Payments***.

Adding a Transfer Account (for an account at another financial institution):

1. Click the ***Transfers*** tab.
2. Click ***Add a Transfer Account***.
3. Answer your security question and click ***Submit***.
4. Choose a nickname, category and type of account.
5. Enter the routing number of the financial institution.
6. Enter your account number and confirm your account number.
7. Click ***Next***.
8. Review the information and click ***Submit Account***.
9. Click ***Activate Account Now***.
10. Select your preferred delivery method for the activation code.
11. Click ***Request Code Now***.
12. Once you receive the activation code, enter it into the text box on the right side of the page.
13. Click ***Submit***.

Making a Transfer to Another Financial Institution:

1. Click the ***Transfers*** tab.
2. Click ***Single Transfer***.
3. Select a category or leave it on "All Categories".
4. Select an account to transfer the funds **FROM** in the "Select Transfer From" window.
5. Select an account to transfer the funds **TO** from the "Transfer To" drop down menu.
6. Enter an amount.
7. Click the calendar to choose a "Process Date".
8. Review the information then click ***Submit Transfer***.