Existing Participant Onboarding Checklist

Initial Engagement	❑ Introduction email sent to participant ❑ Introduction call with participant to discuss integration, pricing, and funding options. Also to walk through ePAY Portal steps if requested. ❑ Assign ePAY team that will assist with onboarding process
Onboarding	❑ Participant, using the instructions provided in introduction email, reviews and updates profile data ❑ Participant executes JetPay and ePAY agreements in ePAYPortal ❑ Participant is boarded on (MAGIC) processing platform and initial setup is complete ❑ ePAY schedules a setup consultation call to discuss integration with participant, if needed
Testing & Training	❑ Conduct setup consultation call with participant to discuss integration needs, if needed ❑ Participant requirements developed by ePAY ❑ End to end testing performed by ePAY ❑ Participant training scheduled by ePAY* ❑ Go-Live date established
Go-live	❑ Participant is converted to production ❑ ePAY monitors participant in production ❑ Participant is live and can contact Customer Support for further questions at 1(855) 226-7337

* Training is provided remotely through web tutorials