

# Welcome to ChoicePay

## New Tenant Guide

**Run secure, automated disbursements for all your cases from one platform.**

For new claims administrators to set up a custom version of ChoicePay. This covers the steps NOT included in New Case Setup.

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## Agreements

### Master Service Agreement

Huntington and Customer agree on a scope of work and sign an agreement.

Locate the MSA document in your email. Download, sign, save locally, and return the signed MSA to your Huntington Customer Success Manager.

## Account Access

### Initial User Accounts

Supply your CSM with the email address for your SuperAdministrator. This person will add others as needed.

OR

Supply your CSM with a list of user email addresses and roles for initial users.

- Lists in the body of an email, an attached document, or a spreadsheet.
- Once created, Admins can add/modify more users within your company.

### Roles

**SuperAdmin:** Sets up back-end data configurations.

**Admin:** Can create, edit, and delete other users; create and edit cases; and create, edit, and cancel campaigns.

**Contributor:** Can view all users but can't create, edit, or delete them. They can also create and edit cases and create, edit, and cancel campaigns.

**Customer Service:** Can search/view cases and campaigns. Can re-send single emails and make individual end-users inactive. Can resend bulk emails and make bulk edits to the End-User list.

**Viewer:** View users, cases, and campaigns.

### Log into ChoicePay

Use the temporary password and link in your invitation email.

Follow the prompts to enter your name and set up MFA.

Returning users log in from your homepage URL: <https://tenant.choicepay.com/admin/auth/login>

\* Bulb icon \* Tip: Admins can resend the invitation email.

### Enable 2-Step Verification (Multi-Factor Authentication)

1. Scan the QR code into your authenticator app.
2. Enter the corresponding code.
3. Update and configure MFA settings from the Preferences menu in ChoicePay.

## Customization

*Gather the customization settings and branding for elements end users will see.*

### Platform Name

Supply exact capitalization, spacing, required service marks/trademark, etc.

## URL

**Private label:** Register new custom domains and configure DNS entries with administrator ownership.

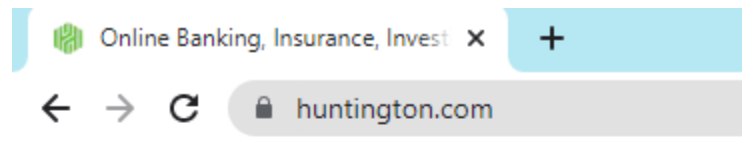
**Hosted:** Huntington will configure Choicepay.com or DigitalTorana.com as <name>.<URL>.com.

## Outgoing Email

Two “From” addresses for notifications. (Ex. noreply@abdata.digitaltorana.com  
noreply-nonprod@abdata.digitaltorana.com)

## Site ID

What will browser tabs say? This can be both the Name and another statement describing the



In this example, the URL is *huntington.com* and the site ID is *Online Banking, Insurance, Investing, Loans & Credit Cards | Huntington.com*

## Page Footer

A copyright statement, year, etc. appears at the bottom of End User-facing pages and emails.

## Tenant Brand

**Ideally, your company has a brand identity/style guide with all this info together and an image asset file ready to share. Ask your Marketing department!**

## Images

**Logo** - 40px+, transparent-background PNG and SVG file.

## Color Palette

HEX color codes:

- Buttons
- Main text
- Secondary text
- Background
- Sidebar

Tip: If you get stuck locating your hex colors, look up approximate color values from your logo and send you the proof.

## Backend Data Integration

Develop a secure SFTP file delivery process.

See ChoicePay checklist along with your information in confluence

## Payee File

Create a Payee list with these fields:

- First Name
- Last Name
- Email
- Amount

## Ingest File Process

<b>Status</b>	<b>Format</b>	<b>Handled by</b>
Payee data: *exists*	Client database	Tenant's Customer
Payor files to Case administrator	Client database > export to csv	Tenant/Role?
OFAC Check		
Excess fields removed, formatted	All CSV > Prepped CSV	Tenant/Role?
Raw data to Case administrator	CSV > JSON	Tenant/Role?
Ingest file upload	JSON to S3	Tenant/Role?
Ingest files *visible in Torana*	Payee list in Torana	CSM

- Runs initial check
- Manually check flagged names

## Test Integration

Verify all the uploads and integrations were successful.

*Verify the Ingest file upload was successful in ChoicePay.*

Log into ChoicePay

Open Cases from the Sidebar.

Find the case in the list and click it to open.

Click on the Campaign.

Open the Payees tab.

If there are no payees, work with your SuperAdmin.

## Training and Setup

### Roles and Responsibilities

This is where you can list detailed instructions on how to input RBAC into ChoicePay system.

Note that this does not happen until all of the above are completed.

SuperAdmin will add new users.

Admin - Sets up the back-end of the payment portal and configures payee data.

Contributor - Makes decisions about the project timeline, banking, and messaging.

Customer Service - Helps end-users/payees troubleshoot issues by looking up interactions and adjusting status as needed.

Viewer - Can view progress and download reports.

## **Payment Providers**

Set Up Payments in Tremendous

Select Payment Providers

Customers must choose a set of payment providers for each case. Within disbursements, choose from that list.

See the [list of payment providers].

**Subheading**

Select payment providers for the Case.

You may choose only from within this list per Disbursement.