ePAY Portal Users and Contact Types

Add, Update, and Deactivate

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ePAY Portal Users and Contact Types

Participants can establish users of varying types within the ePAY Portal. Based on the Contact Type(s) assigned to a user, the user will receive applicable notifications, be provided access to systems outside of the ePAY Portal, and establish permissions as to what that contact may or may not change within the ePAY Portal. The Contact Types available for assignment are below, as well as their access and permission.

Contact Type Table

Role	Access	Permission to Change
INB Bank Signer	Questions regarding INB	Yes, INB only
INB Contacts	Questions related to INB (Funding, account information, general questions)	No
Fiscal	Questions regarding general funding, money movement, and transactions for bank accounts	No
Chargeback	Questions regarding chargebacks	No
IT	Questions regarding integrations or file exchanges	No
Principal Authority	Questions on any subject	Yes
Main Contact	Questions on any subject	Yes, add/remove users only
ePAY Dashboard User	General questions on refunds/voids, based on permissions	Yes, permission based

A user may have multiple Contact Types assigned, if desired.

Contact Type(s) and Notifications

In addition to the permissions listed in the table above, the Contact Type(s) assigned will determine what type of notifications the user will receive regarding announcements, service interruptions, car brand updates, upcoming maintenance, release notes, and security alerts.

Contact Type Notifications Table

	INB Bank Signer	INB Contact	Fiscal	Chargeback	IT	Principal Authority	Main Contact	ePAY Dashboard User
Release Notes	✔	✔	✔	✔	✔	✔	✔	✔
Announcements	✘	✘	✘	✘	✘	✔	✔	✘
Card Brand	✔	✔	✔	✔	✔	✔	✔	✘
Security Alerts	✘	✘	✘	✘	✔	✔	✔	✔
System Maintenance	✔	✔	✔	✔	✔	✔	✔	✔
Service Interruption	✔	✔	✔	✔	✔	✔	✔	✔

Updating Users in the ePAY Portal

Prior to Adding/Updating/Deactivating a User

Before any updates are made to a Participant in the ePAY Portal regarding a user, there are actions that need to be taken to ensure that the requests being made are handled appropriately.

Principal Authority or Primary Contact

The Principal Authority and Primary Contact are important roles to the relationship with the Participant and are the only contact types that may request an update to a user. So, additional documentation is required to add/update/deactivate a Principal Authority or Primary Contact.

- **Principal Authority** – Must have completed and signed ePAY Principal Authority or Primary Contact Change Form, in addition to documentation confirming appointment as Principal Authroity. Documentation examples are meeting minutes or corporate/board resolution.
- **Primary Contact** – Must have completed and signed ePAY Principal Authority or Primary Contact Change Form, in addition to a letter on letterhead signed by the Principal Authority.

If Participant contacts CLH or NCR staff first they should be redirected to ePAY PSS Team at ePAYCustomerSupport@illinoistreasurer.gov or via a warm handoff email.

All Other Contact Types

The Principal Authority or Primary Contact should be the only two Contact Types that should be making contact addition/update/deactivation requests. If contact making request does not have the necessary permissions, the request will not be completed.

Ticket Submission

If the Principal Authority or Primary Contact are requesting a user update either The Chicago Light House or ePAY team member should open the following ticket in ticketing portal:

- Ticket Type – **ePAY Account Information/Maintenance Request**
    - Ticket Subtype – **Update Users**

This ticket type is routed to The Chicago Light House

All tickets must include the following:
- Name of person requesting to have a user added, updated, or disabled. Should also include that person's contact information in the event follow-up is necessary. **This should be either the Principal Authority or Primary Contact.**
- First name, last name, and email address of the user being added/updated/deactivated.
- The Contact Type (INB Signer, Fiscal, Chargeback, etc.) of the contact being added/updated/deactivated.
    - If Principal Authority or Primary contact, ensure that all applicable documentation is attached to the application in the ePAY Portal (Attachments tab).
- If ADDING a new user, please also include what systems contact will need access to.
    - By adding a contact's email address in the ePAY Portal, the contact will automatically be enrolled in StatusCast.
    - If ePAY Dashboard access is to be granted, please specify desired ePAY Dashboard User Role and Payment Permissions.
- If UPDATING an existing user, please include what changes are being made.

- If DEACTIVATING an existing user, please specify system entities in which user should be deactivated (ePAY Portal, Dashboard, StatusCast).

How to Add a User with Contact Type(s)

To be completed by The Chicago Light House

- To add contact information in the ePAY Portal, click on Online App and search for/select participant.
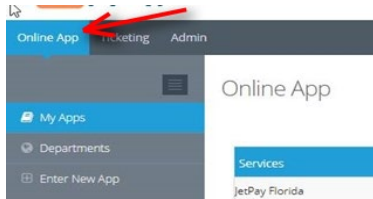

- Navigate to the Users tab, select all appropriate Contact Types, and fill out the contact details that appear in the ePAY Portal. Once all fields have accurate values, click Add User.

***NOTE:** This does not give contact access to the ePAY Portal. That must be established in the **User Roles** section. If ePAY Dashboard User is selected and all required information supplied, this will provide new contact access to Dashboard.

How to Update/Deactivate a User and Contact Type(s)

To be completed by The Chicago Light House

- To update or deactivate a contact in the ePAY Portal, click on Online App and search for/select participant.
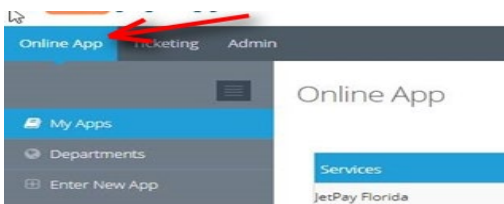
- Navigate to the Users tab and identify which Contact needs to be updated. Click under the Action section for the user and you will be presented with two options for the Contact.
  - o **Edit** – Click here to keep the Contact, but just edit the Contact information.
  - o **Deactivate** – This deactivates the Contact. If done mistakenly, just click under Action again and select Activate to reactivate Contact.
    - If deactivating a contact, ensure that all associated user profiles in Dashboard and the ePAY Portal are deactivated.

User Roles

In addition to a user being added with Contact Types from the Users tab of the account, a person will need to be added as a user of the ePAY Portal, have a User Role assigned, and have specific Participant(s) associated. The User Role assigned will determine the actions permissible to the user. The actions of adding a user of the ePAY Portal, assignment of User Role, and associating specific Participant(s) take place as the result of the submission of Ticket Type ePAY Account Information/Maintenance Request, Ticket Subtype Update Users.

ePAY Portal User Role Table

| Role	Usage
All	Not used
Admin	Not used
External Merchant	Not used
Agent	Not used
Merchant Role	Signers for Local Agencies and Universities
Online App Merchant	Not used
Test External Agent	Not used
State Merchant	Signer for State Agency
Participant-Non Signer	Non-signer for Local Agencies and Universities
State Participant-Non Signer	Non-signer for State Agency
Test Merchant Role	Not used
Special Role-DO NOT USE	Only for University of Illinois
Merchant Ticket Only	Use is only able to create tickets

How to Add a User to the ePAY Portal

To be completed by The Chicago Light House

- In the ePAY Portal, click Admin from the primary navigation menu on the top-left side. You'll then see Create User appear under the Search bar. Click Create User.

- You'll be taken to a screen requesting various information. Any field with a red asterisk (*****) is required.

- You'll need to establish a password for the User. User may change their password after logging in or clicking "Forgot Password?" from the login screen to initiate the password reset process.
- Select the appropriate User Type. For all Users associated with a Participant, you should select **EXTERNAL.**.
- Select the appropriate User Role based off either what was specified in the ticket or the user's Contact Type.
- Once you've entered the information required, you may proceed by selecting one of the three options at the bottom of the screen.
   - o **Register User** – This option will create the User, but they will not be able to view any Participant information.
   - o **Create and Assign Merchant** – This will create the User and you will be taken to a screen in which you will associate the User with a specific Participant or Department.
   - o **Cancel** – Cancels the process. No User information is saved or created.
- The User created should need to be able to view Participant/Department information. Click **Create and Assign Merchant** to proceed to selecting the appropriate Participant(s)/Department(s) to associate with User.
- You'll be taken to a screen with two containers. The container on the left are accounts that are available to be assigned to the user and the container on the right are the accounts assigned to the User.
   - o You may utilize the search bar on the left container to more readily identify the accounts to be associated.
   - o The left and right arrows between the two containers are used to move a highlighted account(s) to either Unassigned or Assigned.
   - o Once the appropriate account(s) is identified, click on to highlight, and click the appropriate arrow to move to Assigned and click **Assign Merchants**.
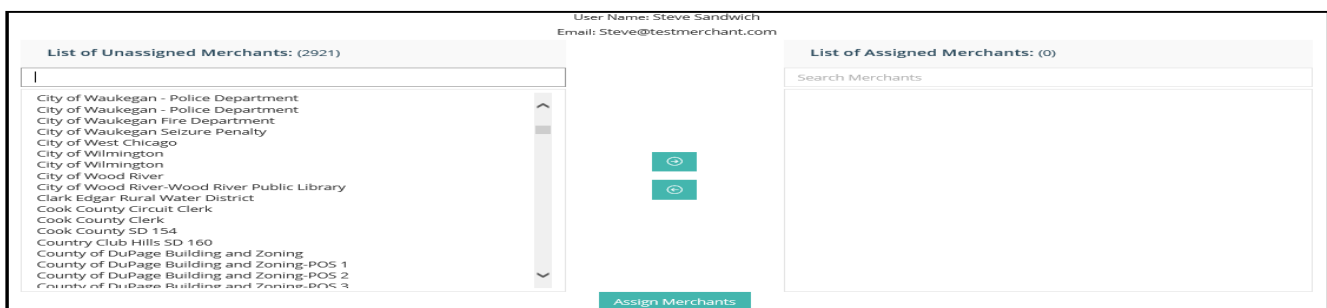
Updating Users in ePAY Dashboard

Prior to Adding/Updating/Deactivating a User

Before making any additions or changes to users in ePAY Dashboard, ensure that the ticket requirements previously outlined in this document have been fulfilled.

User Roles

There are multiple roles within ePAY Dashboard and each provides a different level of access.

Dashboard User Role Table

Role	Role Description
Administrator	The Administrator Role is the top level and any user with this Role will have access to all areas within the Participant's instance and has access to all options and functions. The administrator role has access to all options and functions of a Participant's instance. Administrators can view all organization units, as well as process all org. units' payments, credits, and voids.
Organization Administrator	Organization Administrator is only able to view transactions for their assigned Organization Unit / Department. The Organization Administrator can be assigned individual or all the above payment permissions.
Customer Service Representative	A Customer Service Rep can only view transactions that they themselves have completed. The Customer Service Representative can be assigned individual or all the above payment permissions.

Payment Permissions

Within ePAY Dashboard a user may have multiple Payment Permissions assigned to them, allowing Participants to limit the transaction types the user is able to initiate.

Payment Permissions Table

| Payment Permission	Payment Permission Description
Process Payments	The user will be able to initiate new payments via the ePAY Dashboard.
Process Voids	The user will be able to void successful transactions on the same day that the transaction occurred. This will cause the transaction to never settle to the cardholder's statement and will never be sent for funding to the ePAY Participant.

| Process Credits	The user will be able to issue credits on previously successful transactions up to, but not exceeding, the principal payment amount after the payment has settled. This will cause a secondary credit transaction to appear on the cardholder statement and the credit amount will be debited from Participant funding.

How to Add or Update a User in ePAY Dashboard

To be completed by NCR

- Once logged into Dashboard, use the Switch Client functionality to access the Participant account.
- Once in the Participant account, select Office Users under the Manage function at the top of the screen.
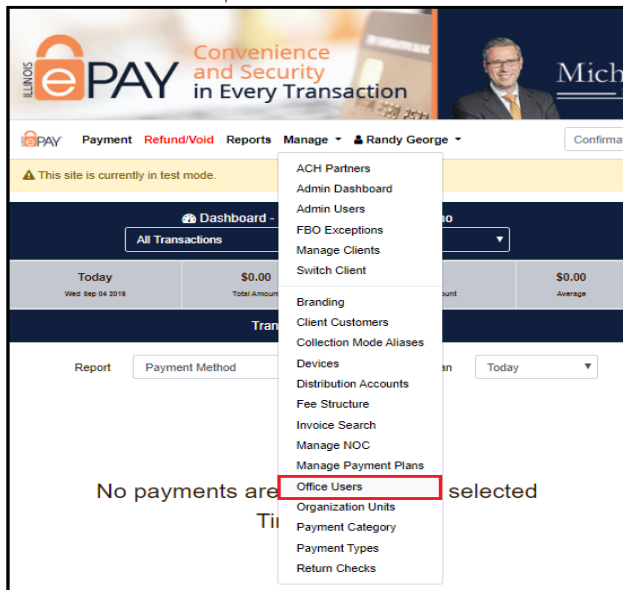
- You'll be taken to a screen containing the existing users.
    - If there are a great number of users and you need to update an existing one, there is a search bar that may be utilized to identify the desired user more quickly.
    - If you are updating a user, editing information or deactivating, you will see those options in line with the user.
    - If you wish to add a user, click Create a New User.
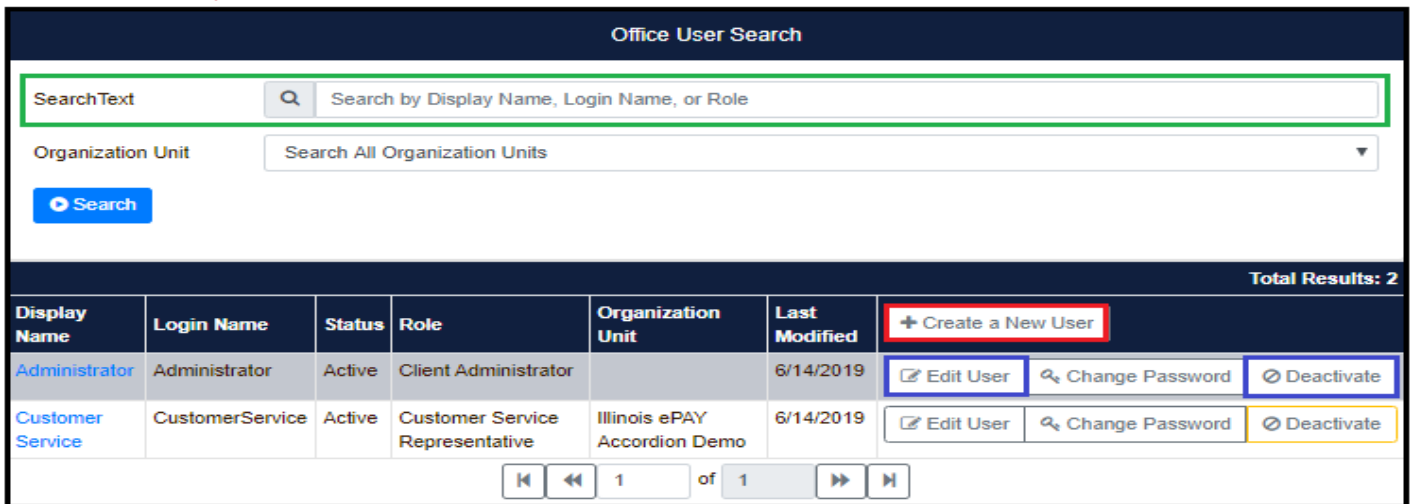
- If creating a new user, you'll be taken to the User Registration screen.
  - Please fill out all applicable fields utilizing the information from the ticket submitted.
  - Much like when you create a user within the ePAY Portal, you'll need to establish the user's password and then convey the password to the user.

👤+ User Registration

Display Name

[   ]

Username

[   ]

Password

[   ]

More information about password complexity.

Confirm Password

[   ]

Email

[   ]

Contact Phone Number

[   ]

Optional

Role

[▼]

Determines the user's accessibility levels.

Status

[Active   ▼]

Preferred Time Zone

[▼]

Payment Permissions

☐ Can Process Payment

☐ Can Process Credit

☐ Can Process Void

Requires "Customer Service Representative" or "Organization Administrator" role.

Advanced Settings

Organization Unit

[▼]

Legacy ID

[   ]

External System ID

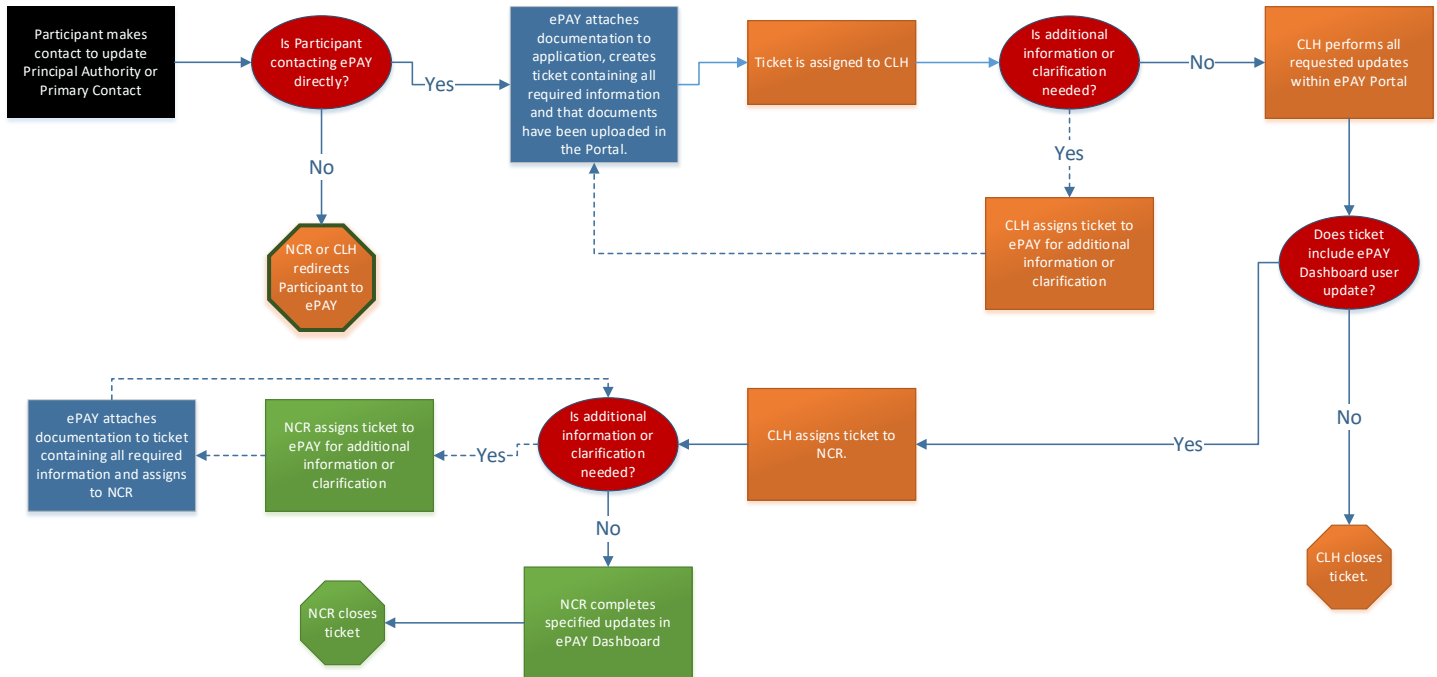[   ]

The External System ID is used as a reference to find users in the system. Various import and export processes utilize the External System ID to process data.

☐ Use 508 Payment Process

[💾 Create]
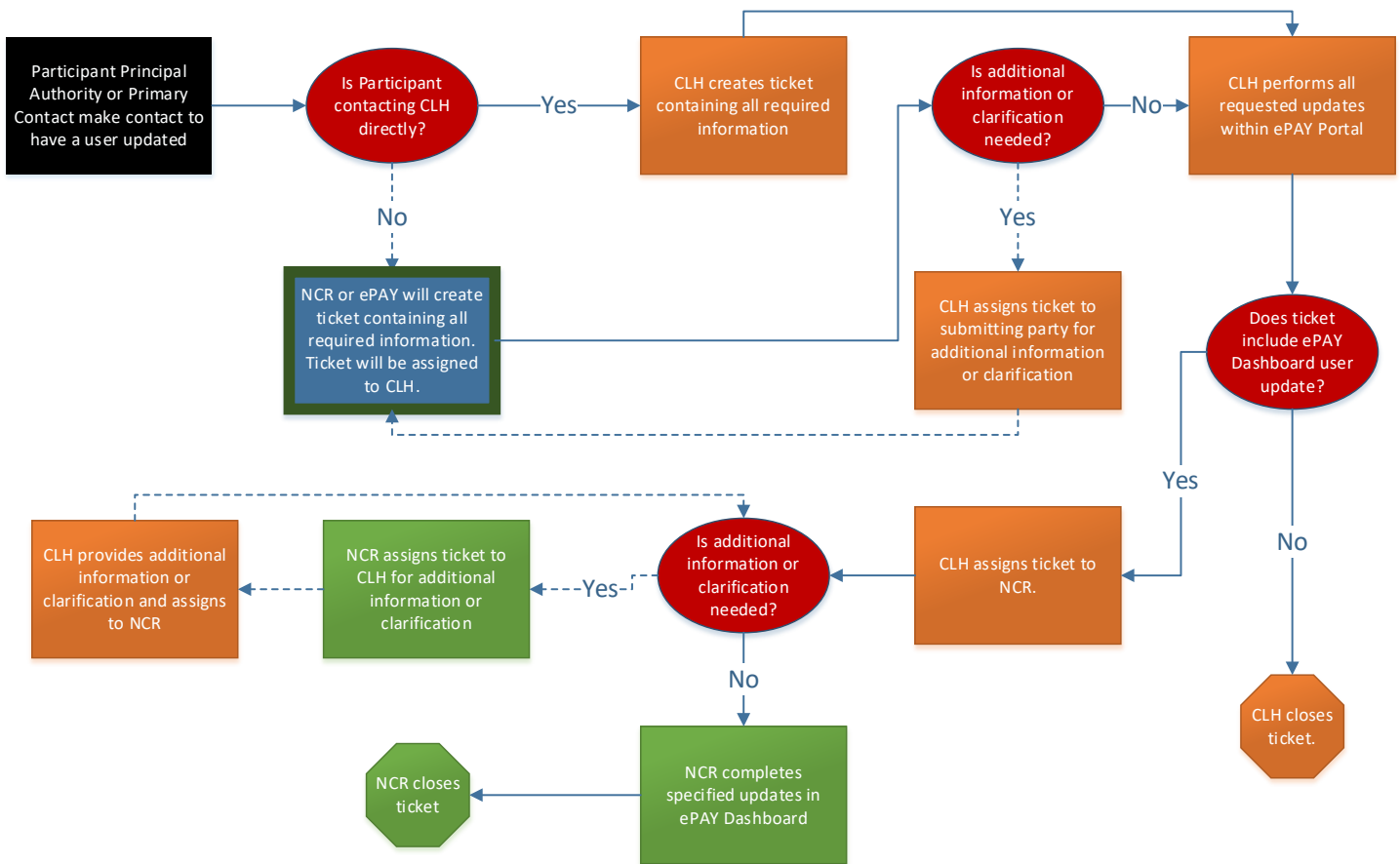

Workflows

Updating Principal Authority or Primary Contact

- Participant makes contact to add/update/deactivate a Principal Authority or Primary Contact.
    - Is Participant contacting ePAY team directly?
        - No – This means that the Participant is contacting NCR or The Chicago Light House (CLH). NCR or CLH should redirect the Participant to ePAY team.
        - Yes – ePAY team will acquire required documentation, attach documents to the application in the Portal, and create a ticket stating changes needed and that the required documentation is saved in the Attachment tab. The ticket will be assigned to CLH.
            - ePAY team will update the Principal/Primary in Salesforce at the account level.
            - ePAY team will also update ePAY Salesforce by linking any old/previous contact to the Salesforce **Generic Account**.
    - CLH will perform all updates requested within the ePAY Portal.
        - Is a user to be added or updated in ePAY Dashboard?
            - No – CLH closes ticket.
            - Yes – CLH will assign ticket to NCR for completion of the ePAY Dashboard user update.
                - NCR will update ePAY Dashboard as requested and close ticket.

***NOTE:** If CLH or NCR have inquiries, need additional information, or clarification regarding the request, then CLH or NCR will reassign ticket back to ePAY team until request is complete and clear.

Updating Contact Types (Not Principal Authority or Primary Contact)

- Participant Principal Authority or Primary Contact makes contact to add/update/deactivate a user.
  - Is Participant contacting CLH directly?
    - No – Contacted parties from NCR or CLH to create a ticket containing all required information and ticket will be assigned to CLH.
    - Yes – CLH to create ticket containing all required information.
  - CLH will perform all updates requested within the ePAY Portal.
    - Is a user to be added to ePAY Dashboard?
      - No – CLH closes ticket.
      - Yes – CLH will assign ticket to NCR for completion of the ePAY Dashboard user update.
        - NCR will update ePAY Dashboard as requested and close ticket.

***NOTE:** If CLH or NCR have inquiries, need additional information, or clarification regarding the request, then CLH or NCR will reassign ticket back to submitter until request is complete and clear.