

## ONBOARDING CHECKLIST

WEEK OF GO-LIVE	Complete By	Action Item
	April 1 <sup>st</sup>	Activate and login to your Billhighway account – <a href="#">Instructions</a> <ul style="list-style-type: none"> <li>You will receive an activation email from Billhighway. Be sure to check junk mail folder.</li> </ul>
	April 7 <sup>th</sup>	Review recorded training videos and Billhighway Resource Center – <a href="#">Review Here</a>
	April 7 <sup>th</sup>	Submit questions and topics you would like to review during the Billhighway training session – <a href="#">Submit Here</a>
	April 7 <sup>th</sup>	Register for and complete Billhighway training session - <a href="#">Register Here</a>
	April 7 <sup>th</sup>	Update primary contact information within Billhighway – <a href="#">Instructions</a>
	April 8 <sup>th</sup>	Create an initial transfer of \$100-\$500 from local bank account – <a href="#">Instructions</a> <ul style="list-style-type: none"> <li>Other Tools &gt; Transfer Funds &gt; Select 'Local Bank Account' as 'Transfer From Account'</li> </ul>
	April 8 <sup>th</sup>	Order your Billhighway materials <ul style="list-style-type: none"> <li>Prepaid Card – <a href="#">Instructions</a> · Anywhere Device - <a href="#">Instructions</a> · Billhighway Checks – <a href="#">Instructions</a></li> </ul>

POST GO-LIVE	Complete By	Action Item
	April 15 <sup>th</sup>	Activate and login to your ePly account – <a href="#">ePly Information and Training</a> and <a href="#">ePly for Sponsorships</a> <ul style="list-style-type: none"> <li>You will receive a welcome email from ePly. Be sure to check your junk mail folder.</li> </ul>
	April 22 <sup>nd</sup>	Enter 2022 fiscal year budget into Billhighway – <a href="#">Instructions</a>
	April 22 <sup>nd</sup>	Fund your Billhighway account by creating a transfer – <a href="#">Instructions</a> <ul style="list-style-type: none"> <li>Other Tools &gt; Transfer Funds &gt; Select 'Local Bank Account' as 'Transfer From Account'</li> <li>For more information on funding your Billhighway account, review the Financial Data Conversion guide - <a href="#">Here</a></li> </ul> <p>Be sure to leave a balance in your local bank account to cover any pending or uncleared transactions.</p>
	April 30 <sup>th</sup>	Review your dues disbursement deposit from Women's Council national <ul style="list-style-type: none"> <li>Look for an email confirmation to the primary contact and review the deposit under Reports &gt; Transaction Reports &gt; Deposits</li> </ul>
	May 2 <sup>nd</sup>	All network finances and transactions are initiated and managed in Billhighway
	May 9 <sup>th</sup>	Ensure all checks and transactions from local bank account have cleared and transfer remaining funds into Billhighway
	May 16 <sup>th</sup>	(Optional) Close your network's local bank account <ul style="list-style-type: none"> <li>Prior to closing your bank account, it is important to request copies of all financial statements through the fiscal year end</li> </ul>