Quick Reference Guide (QRG)
Wells Fargo E-Bill Express Payment Portal

OVERVIEW
This guide will walk through the steps a payment portal user will follow to register their account, set up a one-time payment, or set up a recurring monthly payment. The guide will also outline the process to cancel a payment, link accounts, or share account access with another individual.

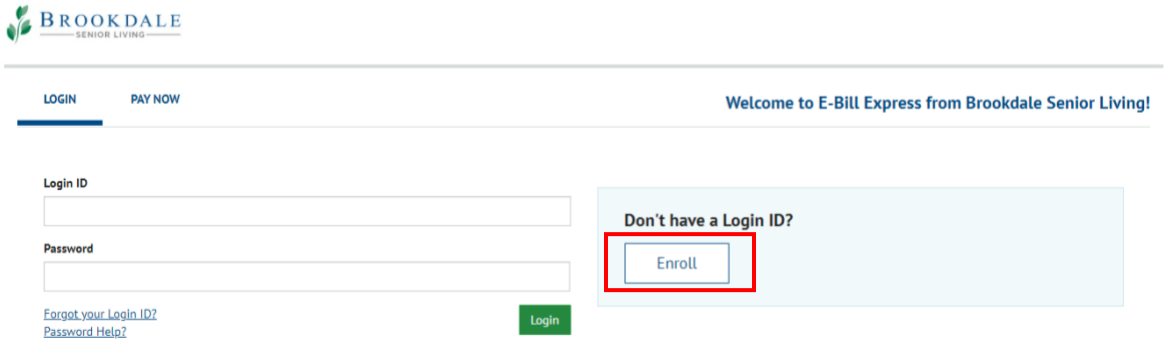
Table of Contents- Click on a topic below to navigate to that section

E-Bill Registration
Submitting One Time Payments for Registered Accounts
Cancelling a Payment
Setting Up Recurring Payments
Payments on Non-Registered Accounts
Linking Accounts
Inviting Additional User to Access and Account
Updating Paperless Invoicing Settings

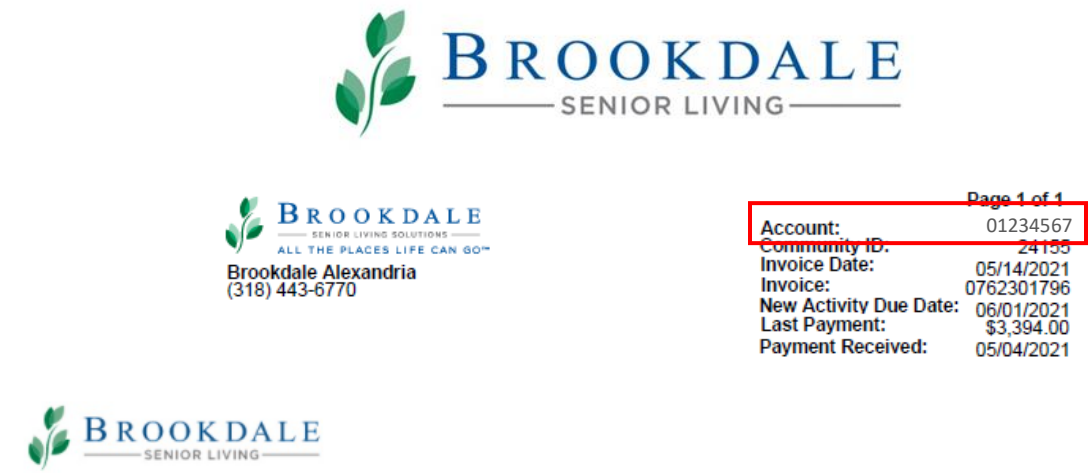
E-bill Registration

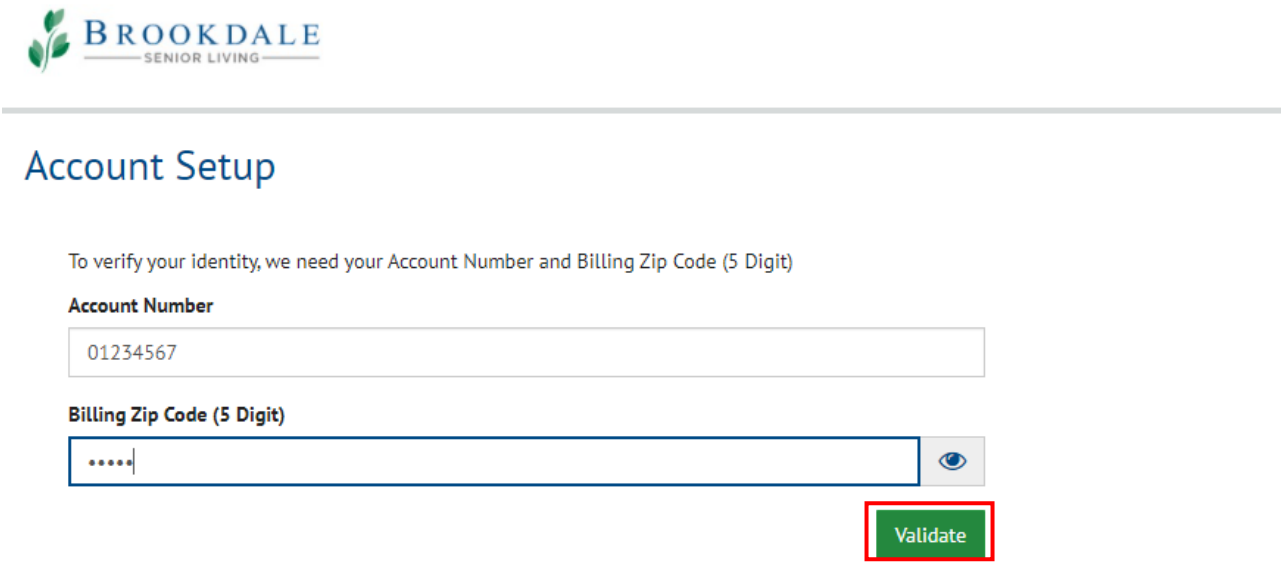
Registration is available for users after their first invoice generates. Initial move in payment can be made via physical check or by phone call to the 1-800-383-9993 customer service number. Subsequent payments can be made on the portal. To register, the user will start from the appropriate e-bill link located at **www.brookdale.com/pay**. Depending on if the BUs state currently allows for credit card (CC) payments or not, the portal will route the user and allow for both CC and checking/savings accounts, or just for checking/savings accounts exclusively. This guide will walk through setup from a credit card point of view, but all steps are the same when using a bank account. For the non-registered payment example we will use a bank account for familiarity with that view as well.

1. From the link, the user will select the enroll option.

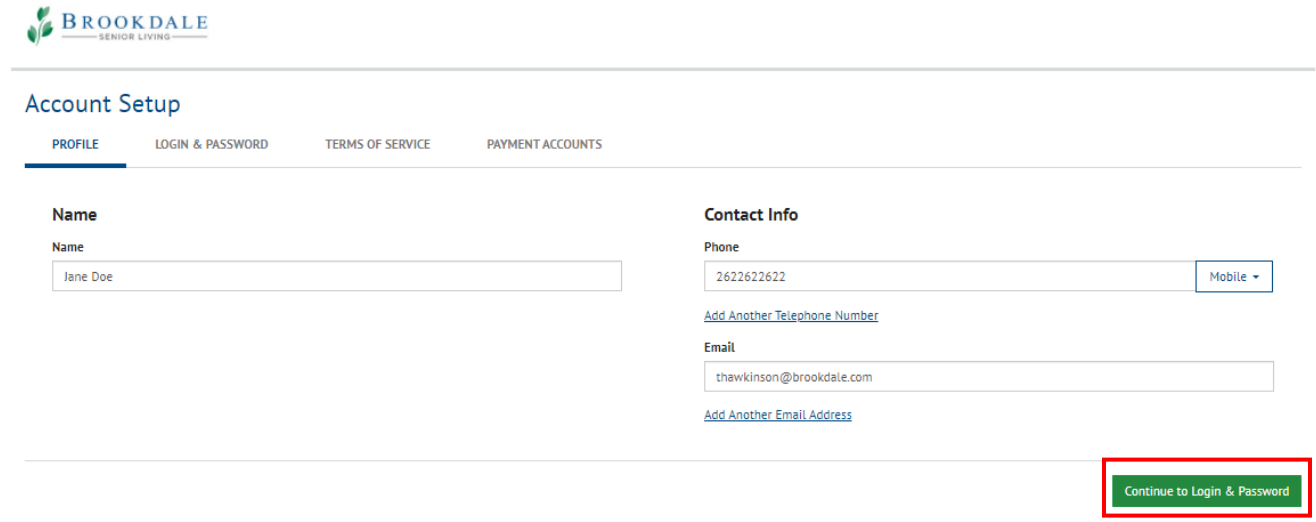


2. The user will then enter in their 8 digit Brookdale ID as well as their billing zip code, and then select to validate the information. This account number can be found on their invoice in the top right corner, the zip code would be the mailing address the invoice was sent to, which is also located at the bottom of the invoice.





3. The user will enter in the phone number and email address they would like to associate with their profile, and continue to login and password entry.



4. Next, the user will select a login ID as well as a password for their profile. They will also select a security image and answer three security questions, then continue to the terms of service.

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Account Setup

✔ PROFILE | LOGIN & PASSWORD | TERMS OF SERVICE | PAYMENT ACCOUNTS

Create an Account

Login ID

testaccount2

Password

••••••••••

Passwords must have at least 8 characters and have at least 3 of the following:
- 1 or more numbers
- 1 or more uppercase characters
- 1 or more lowercase characters
- 1 or more of these special characters *+-/=?^_{}~!@$

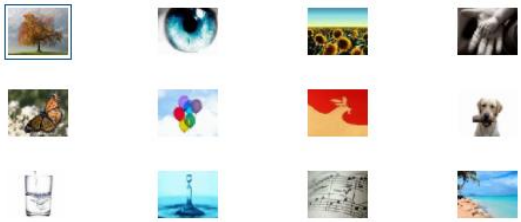
Passwords cannot include:
- the last password
- your name
- your Login ID
- more than 3 repeating characters, numbers or special characters, such as AAAA, 2222 or !!!!
- more than 3 consecutive characters or numbers, such as aBcD or 4567
- the zero character at the start or end
- the word "password" (common dictionary words should be avoided)

Re-enter password, just to be sure

••••••••••

Choose a Security Image and give it a label

You'll see your selected security image and label in email notifications. When you see your image and label on a notification, you can be sure it is from us.



Give your image a label

test

Choose Your Security Questions

We'll use these questions to help verify your identity if you forget your login credentials. Make sure you give answers that you can easily remember.

Question	Answer
Question 1: What is your grandmother's maiden name on your father's side?	Answer 1: Doe
Question 2: What is your grandmother's maiden name on your mother's side?	Answer 2: Smith
Question 3: How many brothers and sisters did your mother have?	Answer 3: three

Go Back | Continue to Terms of Service

5. The user will accept the terms and continue to payment account information.

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Account Setup

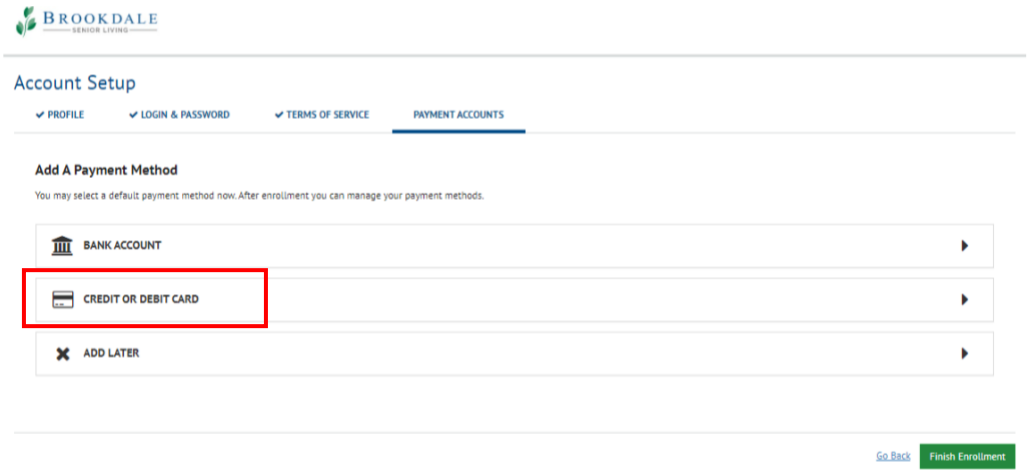
✔ PROFILE | ✔ LOGIN & PASSWORD | TERMS OF SERVICE | PAYMENT ACCOUNTS

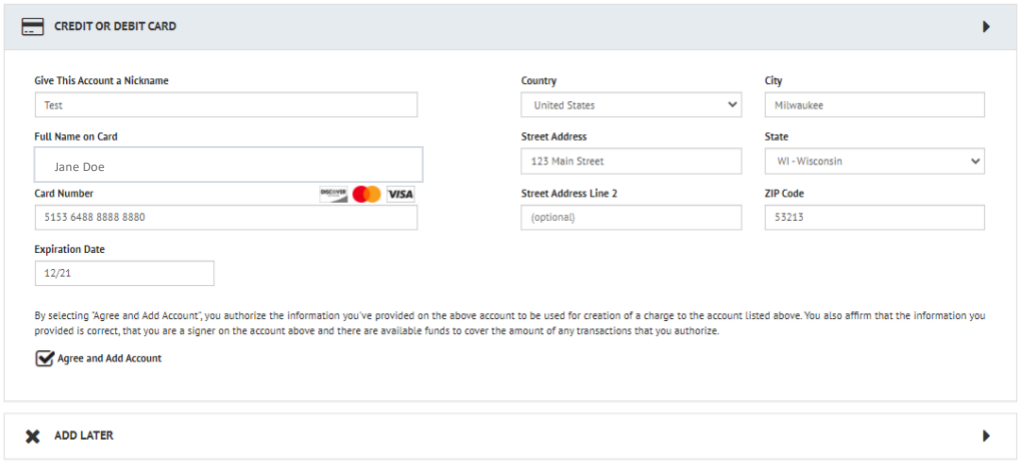
Terms of Service

☑ By clicking this box, you are enrolling in this service and have read and agree to the Terms of Service for this site.

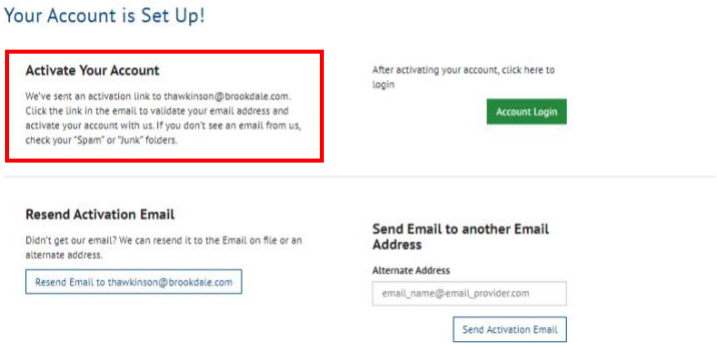
Go Back | Continue To Payment Accounts

6. The user can enter in account information that they would like to store on their profile, or can select to add later as they would prefer. If their state allows for CC payment they can add banking or credit card information, if a bank payment state only, the CC option will not be listed. In this example scenario we will add a credit card to the profile by selecting the credit or debit card option, and then completing the necessary fields before selecting to finish enrollment. If bank account is selected the fields will display slightly differently as they will ask for banking information instead.

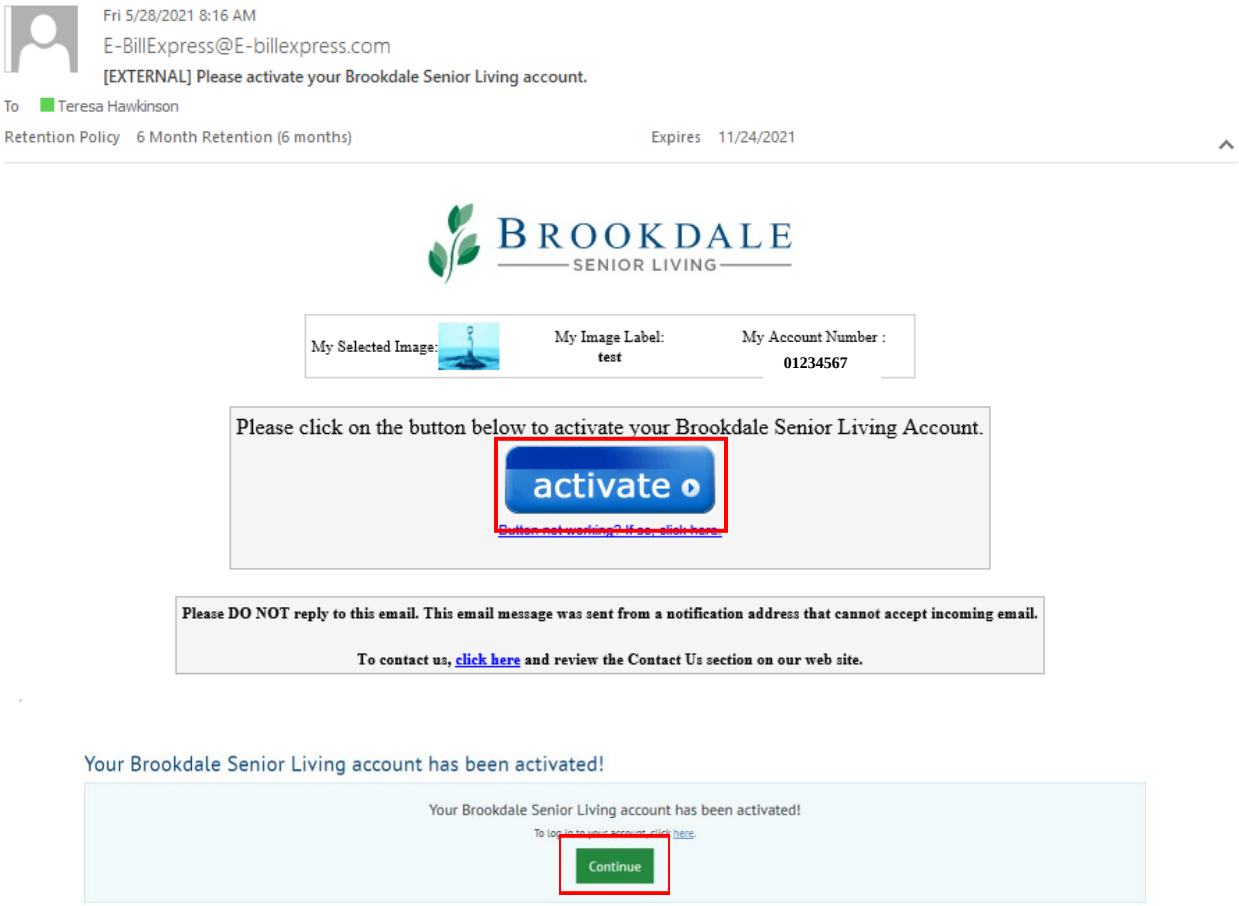




After completing the necessary information, the page displays confirmation information, but please note step 7- email confirmation- is required before payment can be made.



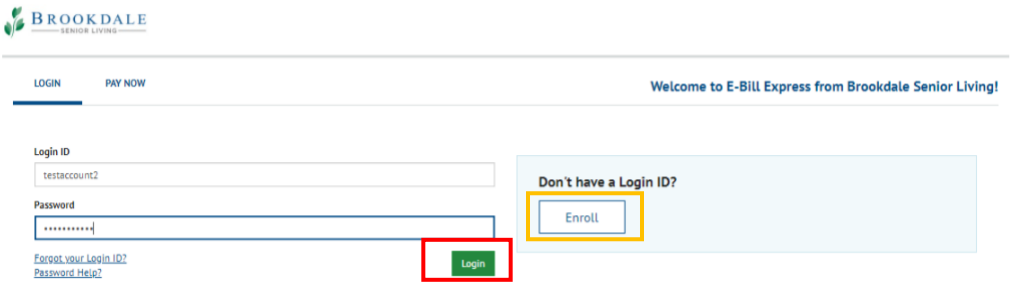
7. After completing all registration information, the user will receive an activation email to the address they registered with, and will need to select the activate button.



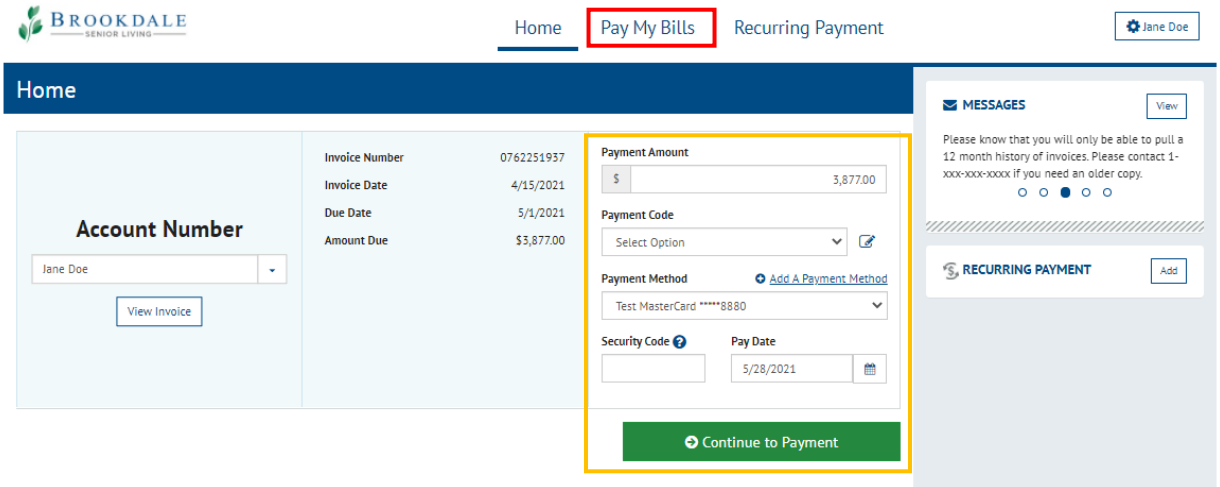
8. The user has now successfully registered for the payment portal and can continue to make a payment, or can leave the system and return when ready to initiate payment.

Submitting One Time Payments for Registered Accounts

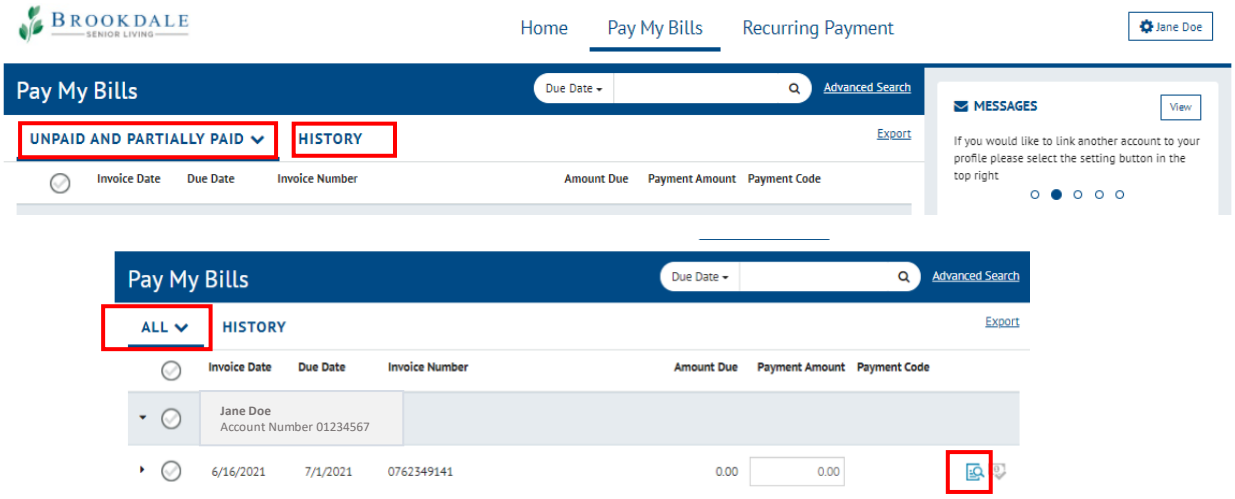
1. A registered account can make one time payments through the portal. To make a payment the user will start by logging in- if not yet registered, they can first enroll.

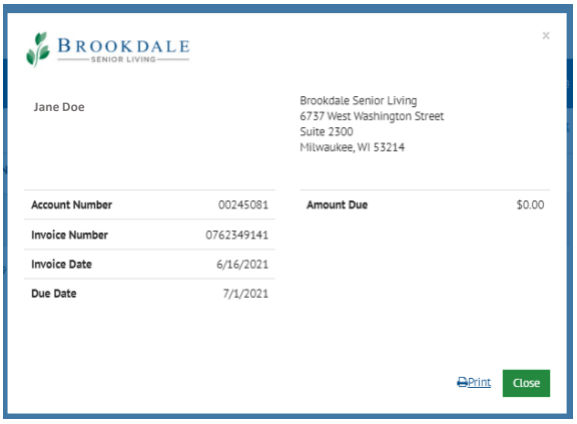


2. From the home page the user can complete the quick payment fields displayed immediately (yellow highlight below), or select the Pay My Bills link to view further details. In this example we will move to the Pay My Bills screen.

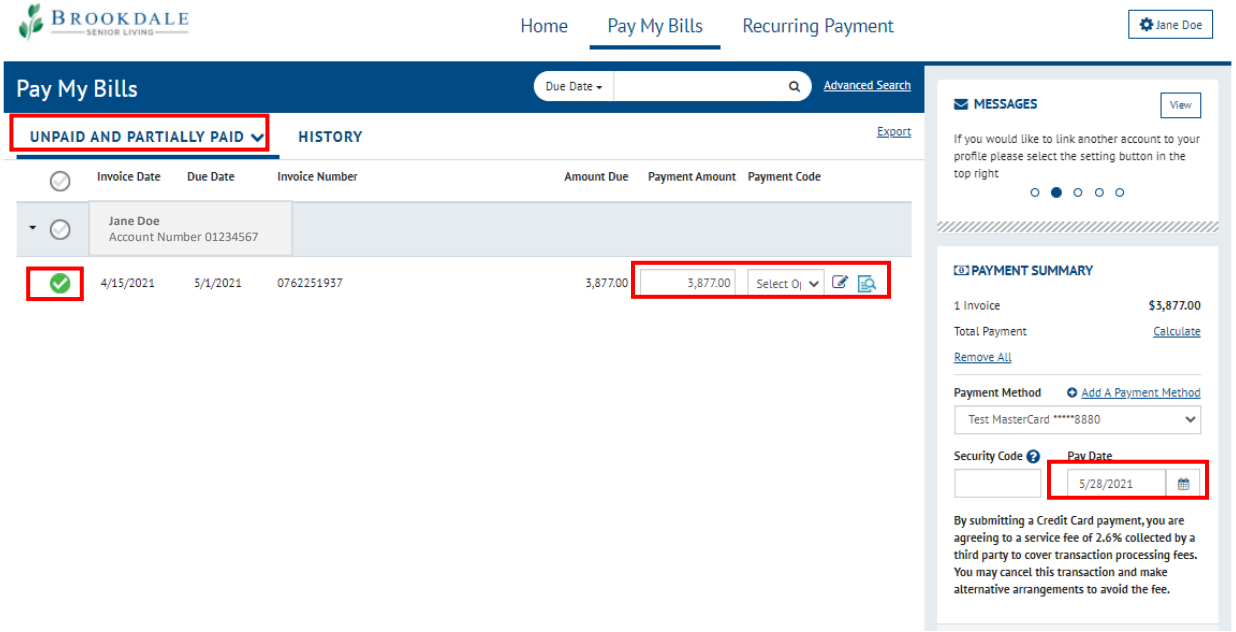


3. From the payment screen the user can review their invoices, and select any open invoices they would like to pay. To view all invoices the user can select the unpaid and partially paid default header and change the drop down to display all invoices, then the user can click on the magnifying glass on any one payment for more details. A user can also select the history option to review prior payments made on the account.

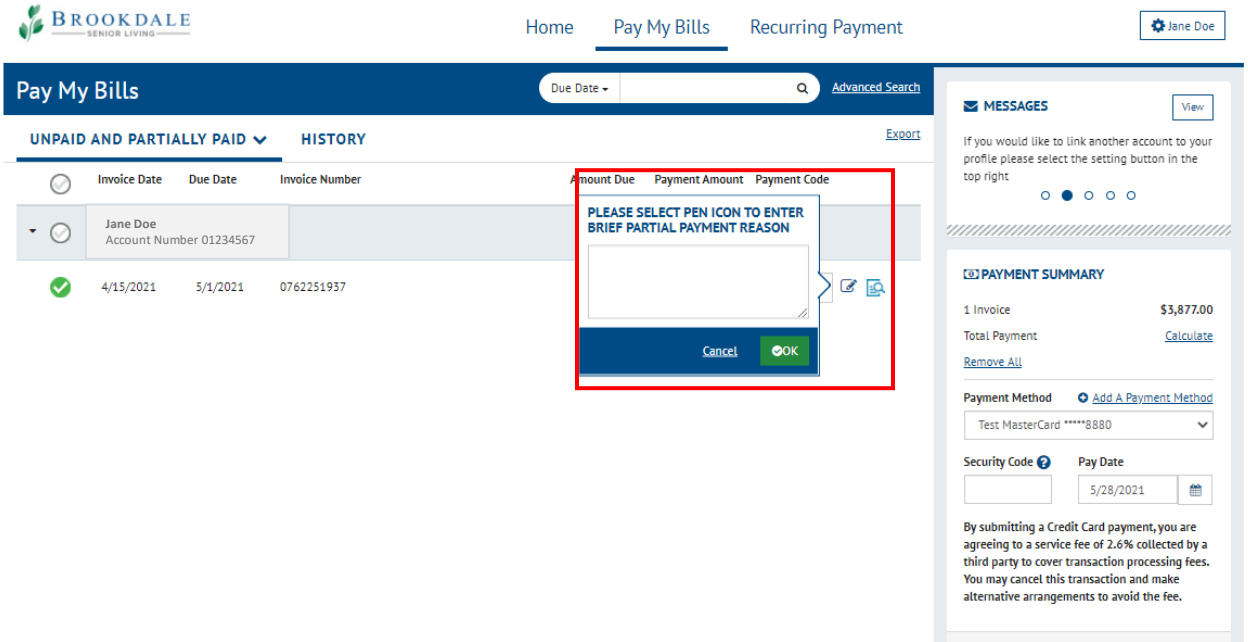




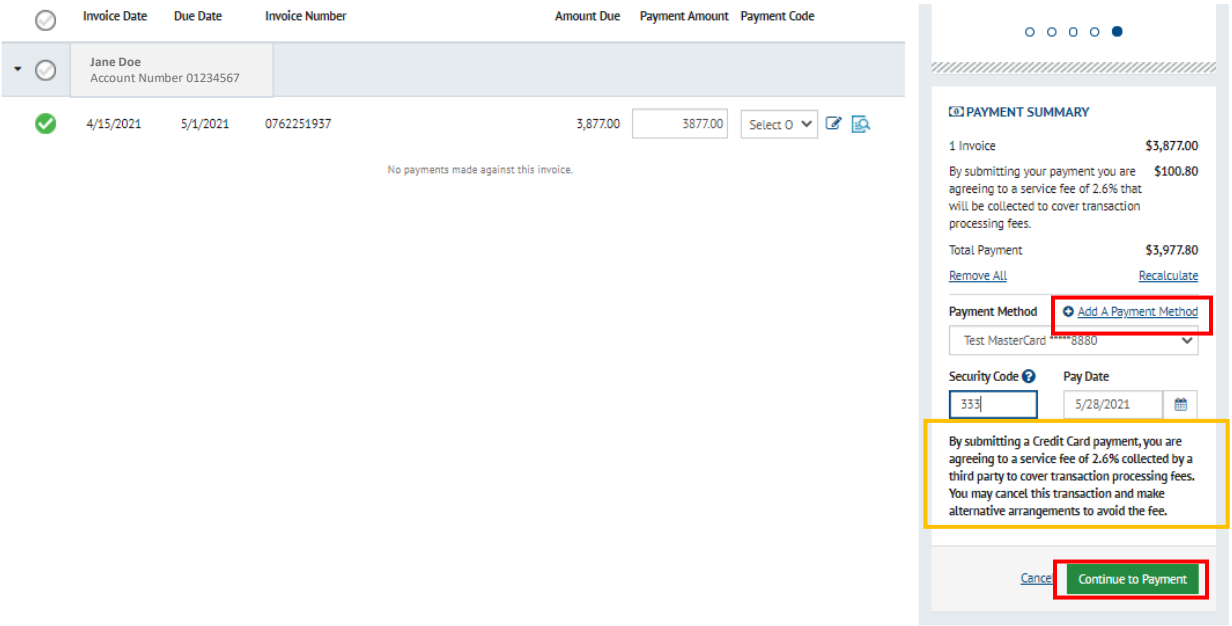
4. To make a payment, the user can select any open invoice(s) using the check marks on the left of the screen. They can adjust the amount down if they will be making a partial payment, but the system will not allow overpayment. The user can also edit the date as needed if they would like to future date.



5. If making a partial payment a comment explaining the circumstances may entered.



6. The user can enter a new payment method, or enter the CCV of the card on file, and then continue to payment. Please note credit card payments do charge a service fee that is notated on the confirmation screen.



7. The user will review payment details and agree to payment terms before submitting. They can also review the details from the dropdown if necessary

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Home | Pay My Bills | Recurring Payment | Jane Doe

Verify Payment

PAYMENT SUMMARY

1 Invoice	$3,877.00
By submitting your payment you are agreeing to a service fee of 2.6% that will be collected to cover transaction processing fees.	$100.80
Total Payment	$3,977.80

Payment Method: Test MasterCard *****8880 (Add A Payment Method)

Security Code: ***

Payment Date: 5/28/2021

By submitting a Credit Card payment, you are agreeing to a service fee of 2.6% collected by a third party to cover transaction processing fees. You may cancel this transaction and make alternative arrangements to avoid the fee.

Payment Terms & Conditions

These terms and conditions govern your use of the Internet Bill Presentment and Payment Service (the "Service"). As used in these Terms, the words "we," "us," and "our" refer to Wells Fargo Bank, N.A. (or its affiliate). The words "you" and "your" refer to you as the business entity accepting these Terms and using the Service. The words "you" and "your" also include any user you authorize to use the Service on your behalf.

1. Erroneous Instructions. If we receive a payment instruction authorized by you and the instruction is erroneous in any way, we shall have no obligation or liability for the error.

2. Transaction Limitations. Please be aware that certain types of bank accounts have limits on the numbers of transfers or withdrawals that may be made per month. Your bank may refuse transfers which would exceed such limits, so we recommend you check with your bank to determine what limitations are imposed on withdrawals from any account. If we are not able to debit the amount required to cover an

Print Terms and Conditions

☑ By checking this box you agree to the terms and conditions stated above.

By clicking the **Make Payment** button I, **Jane Doe, confirm** that today, Friday May 28, 2021, I am authorizing a one-time debit from my MasterCard account ending in *****8880 in the amount of $3,977.80 USD, including a separate fee of $100.80 to be remitted to Brookdale Senior Living. This debit will occur on or after Friday May 28, 2021.

If you have any questions regarding this transaction request, please call 800-383-9993.

Make Payment

Cancel

PAYMENT DETAILS

Export

PAYMENT DETAILS

Export

Invoice Date	Due Date	Invoice Number	Amount Due	Payment Amount	Payment Code
ACCOUNT NUMBER 01667202					
4/15/2021	5/1/2021	0762251937	3,877.00	3,877.00	Select Option

8. The payment will be submitted to the billing system and will post to the account within 2-3 business days.

Confirmation

Thank You! Your payment has been made.

Print Confirmation Page

Jane Doe

Payment Date

Payment Method

Payment Amount

By submitting your payment you are agreeing to a ser

Total Payment

You have been provided a confirmation number. Please save this page for your records.

Payments confirmed before Friday, May 28, 2021 4:00 PM CT will be posted on Friday, May 28, 2021.
Payments confirmed after Friday, May 28, 2021 4:00 PM CT will be posted on Tuesday, June 01, 2021.

If you have any further questions about payments to Brookdale Senior Living, please contact our office at 800-383-9993 .

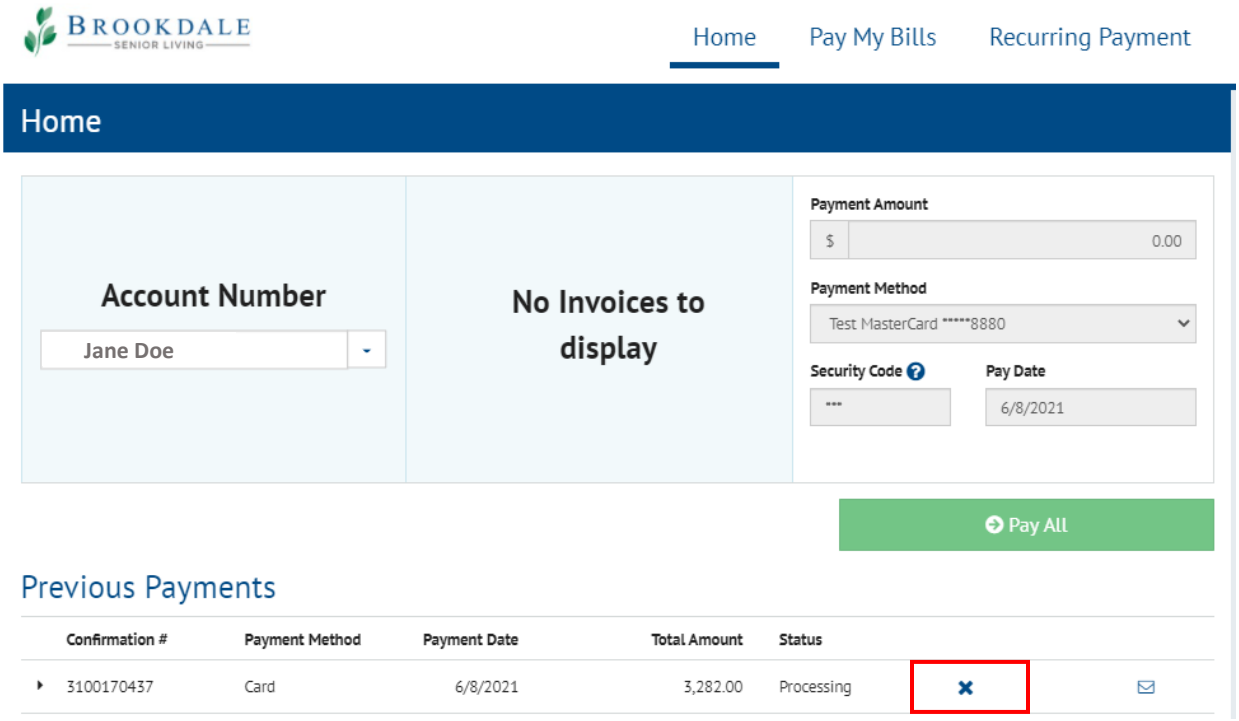
Description	Account Number	Confirmation #	Payment Amount	Number of Invoices
Salem	01234567	3100170118	$3,877.00	1
	By submitting your payment you are agreeing to a service fee of 2.6% that will be collected to cover transaction processing fees.	3100170119	$100.80	

Set Up Recurring Payment | Return to Pay My Bills | Log Out

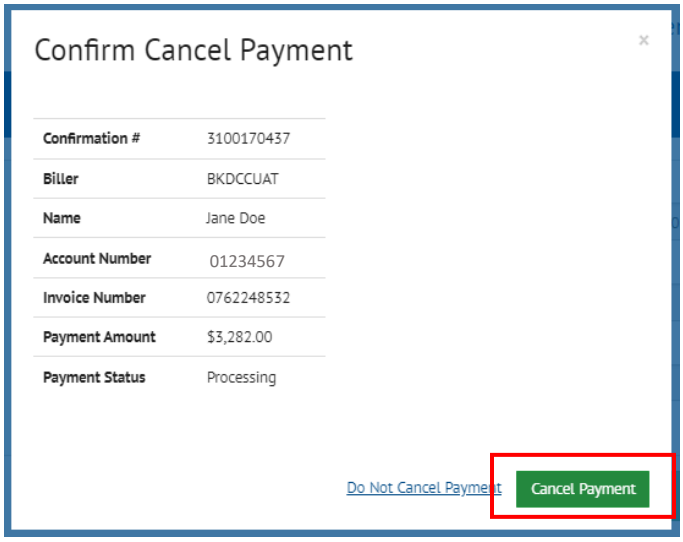
Cancelling a Payment

Users have the ability to cancel a payment scheduled for that date prior to 4PM C.

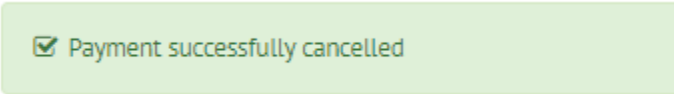
1. A user can access their prior payments from the portal home screen. Any payment still pending can be cancelled by selecting the X icon next to the payments status.



2. The user will confirm the payment to be cancelled, and select the cancel button.

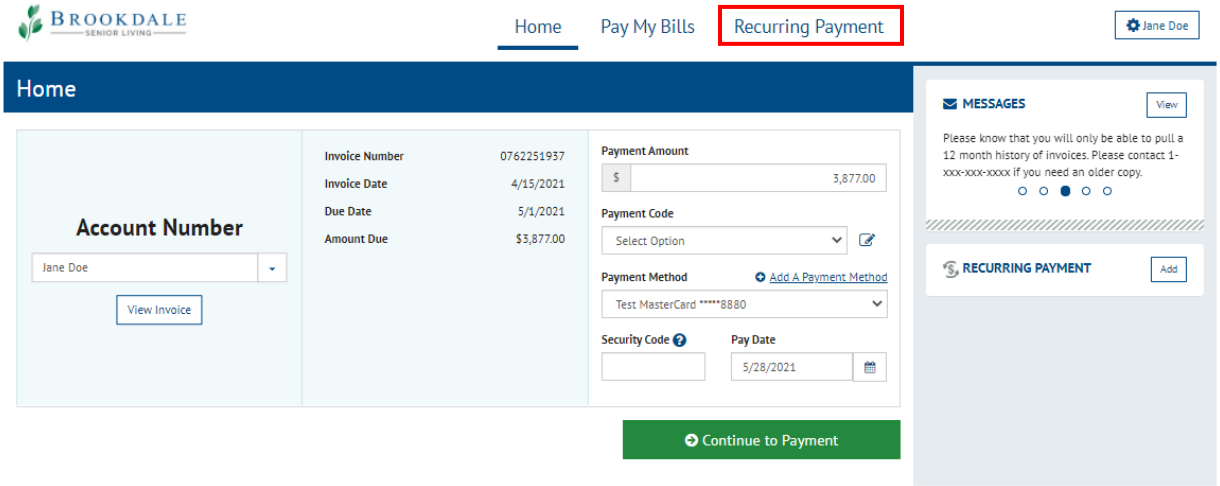


3. A pop up box will confirm the payment has been cancelled.

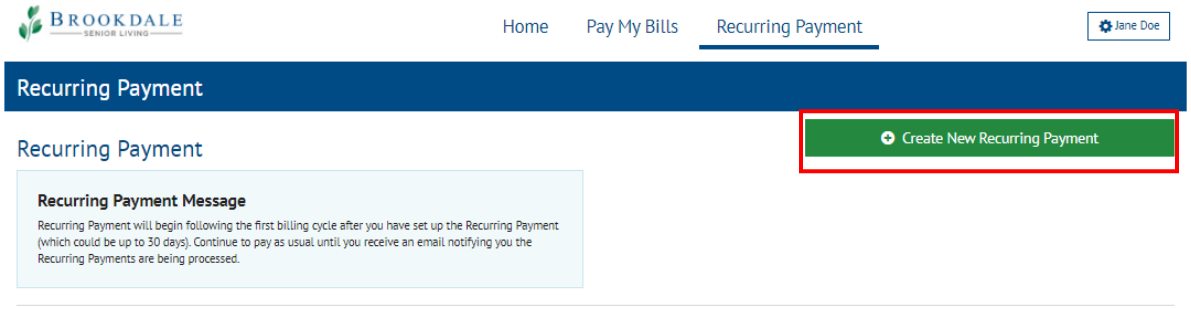


Setting up Recurring Payments

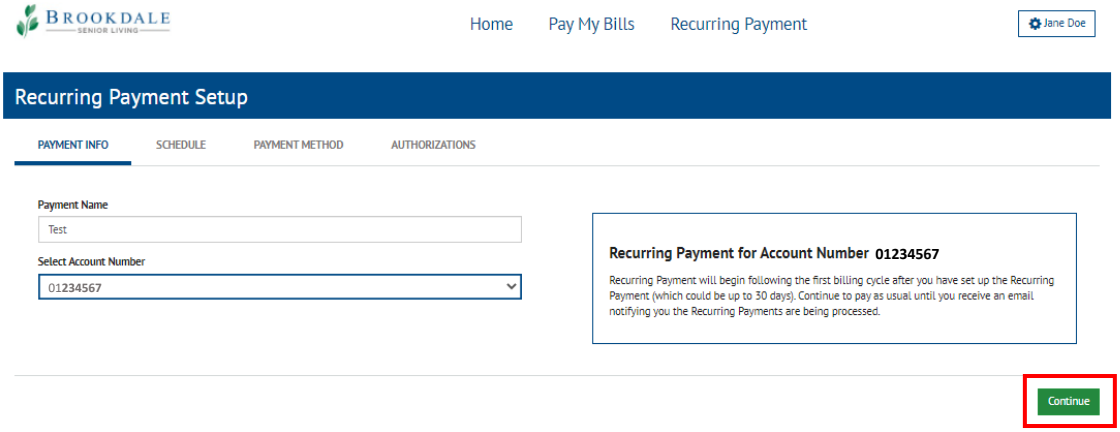
1. To set up a recurring payment, the user will log in and on the home screen the user will select the recurring payment option.



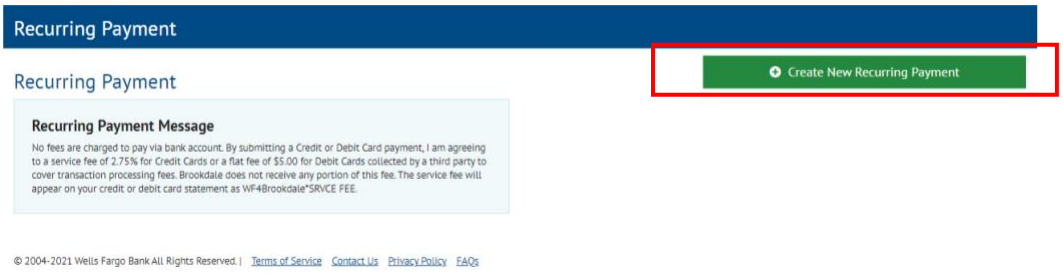
2. From the recurring payment screen, select the Create New Recurring Payment button.



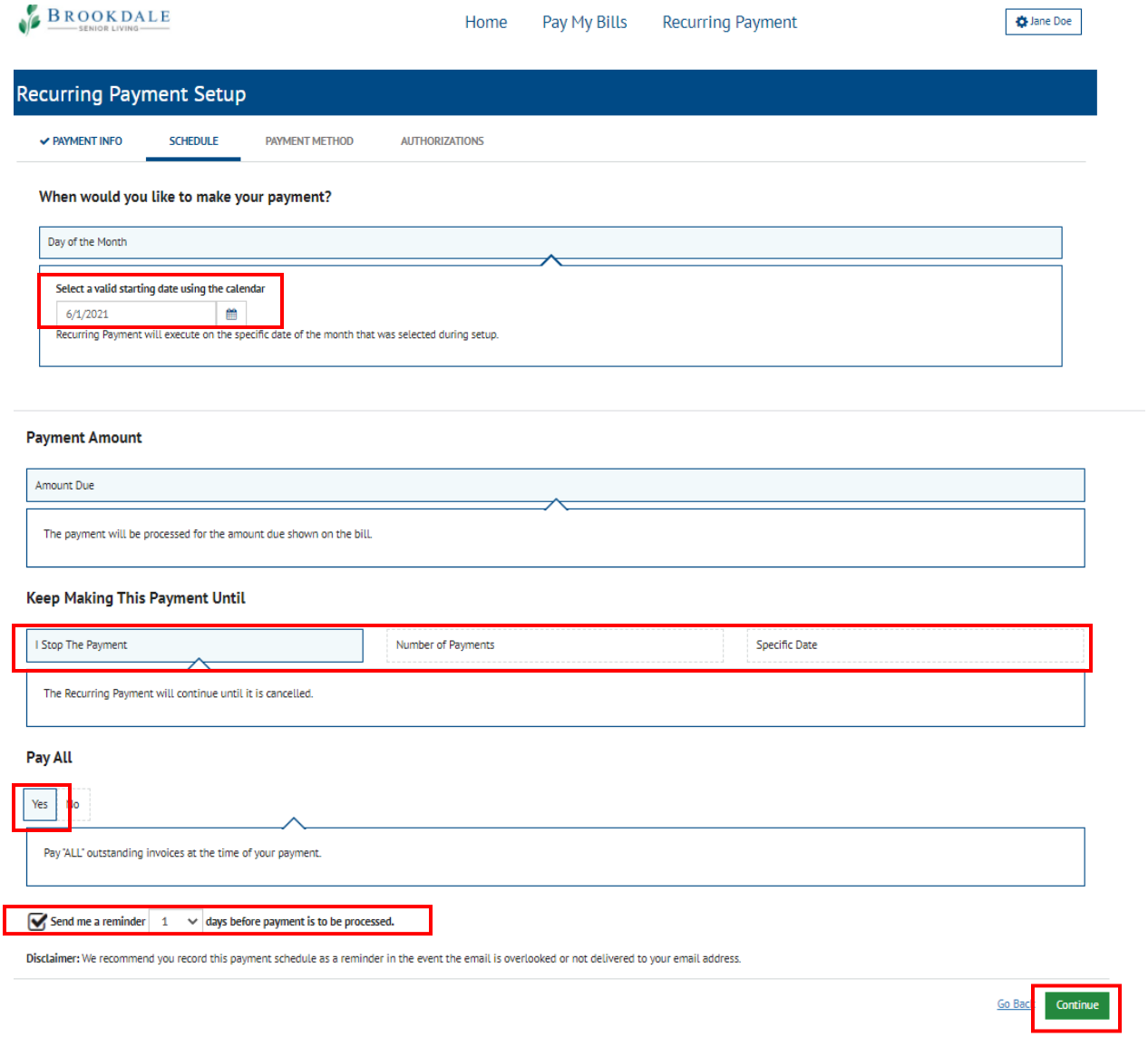
3. The user will select the account for the recurring payments and continue.



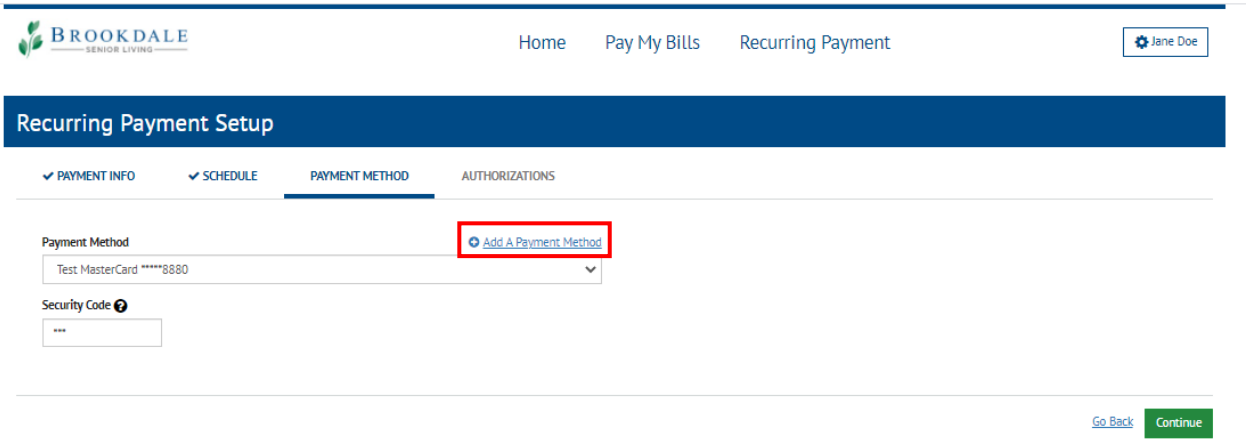
4. Information related to card processing fees will display, and the user will continue to create new payment



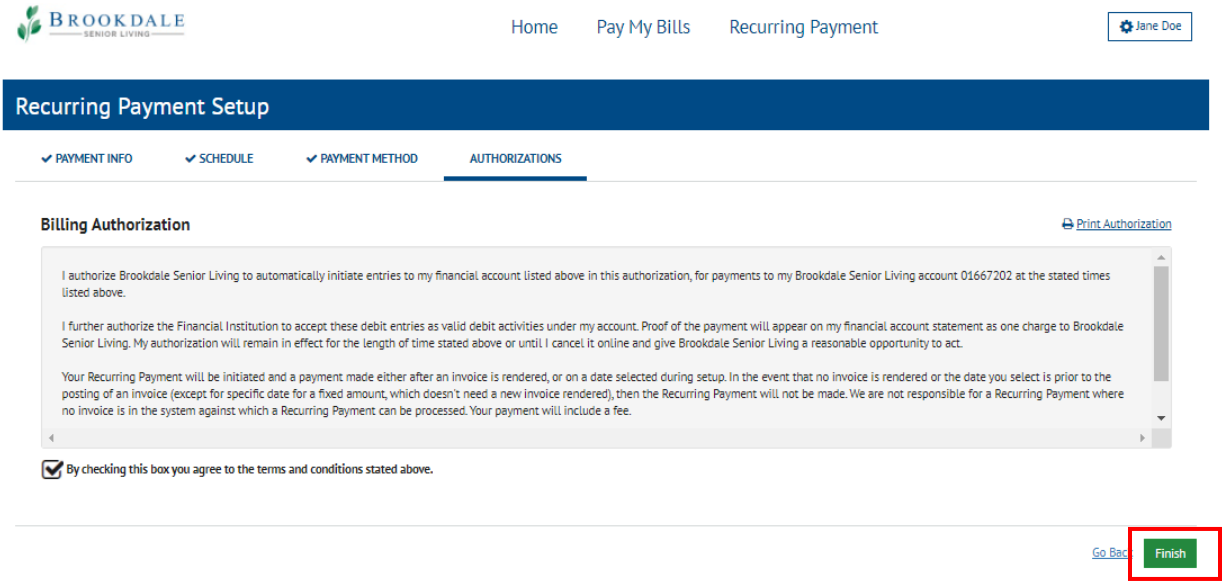
5. The user will select the terms of their recurring payments. There will be options for the day of the month the payment will withdraw (the 1st or the 5th) as well as the frequency of the recurrence (until they cancel the requests, for 5 invoices, until a specified date) and the ability to pay all invoices in full (recommended) vs. just the most recent invoice (may leave a balance due). The user can also ask for a payment reminder on this screen before continuing.

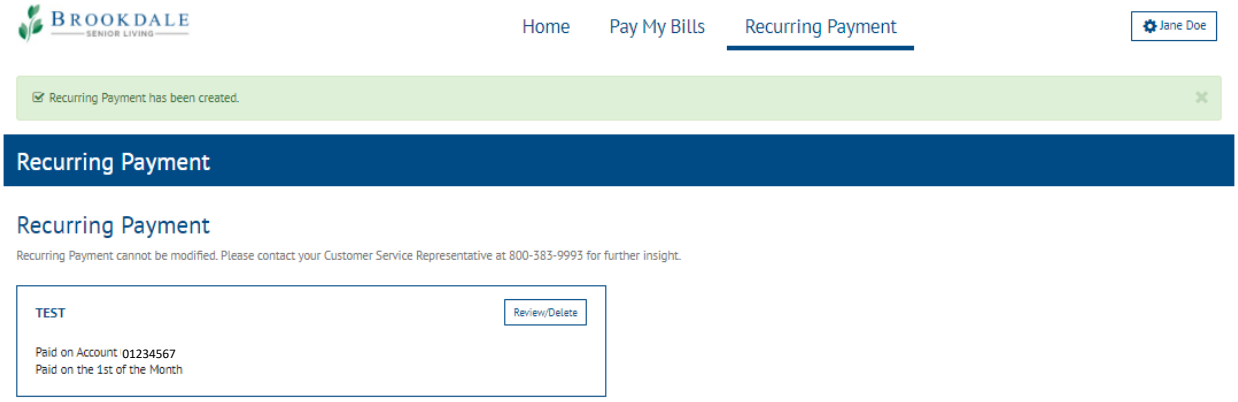


6. The user can select a saved payment method on file, or add a new payment method as required.



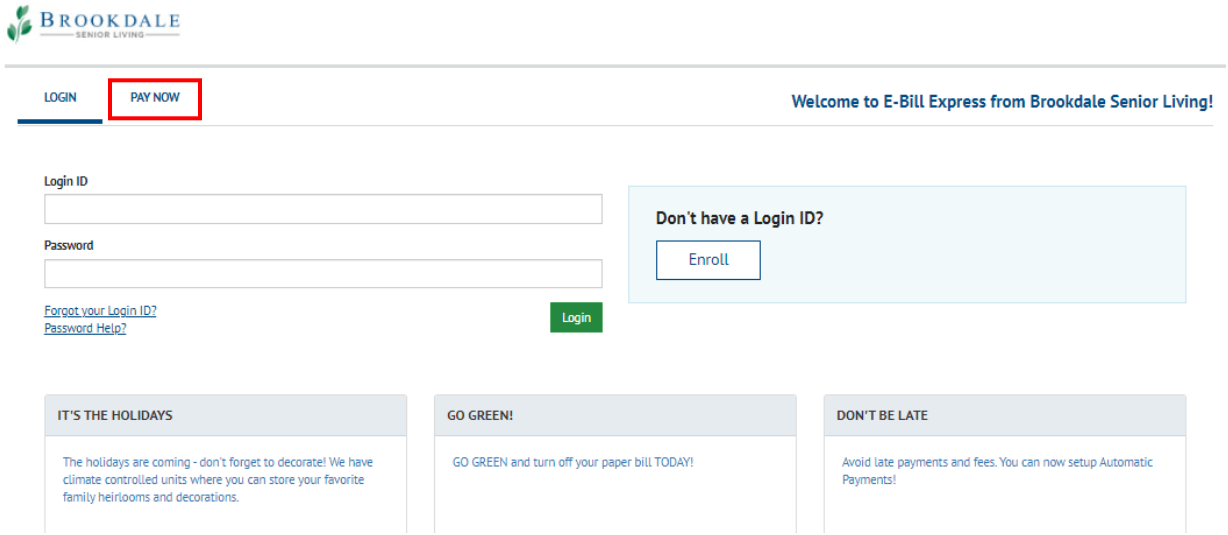
7. The user will agree to the terms and finish registration.



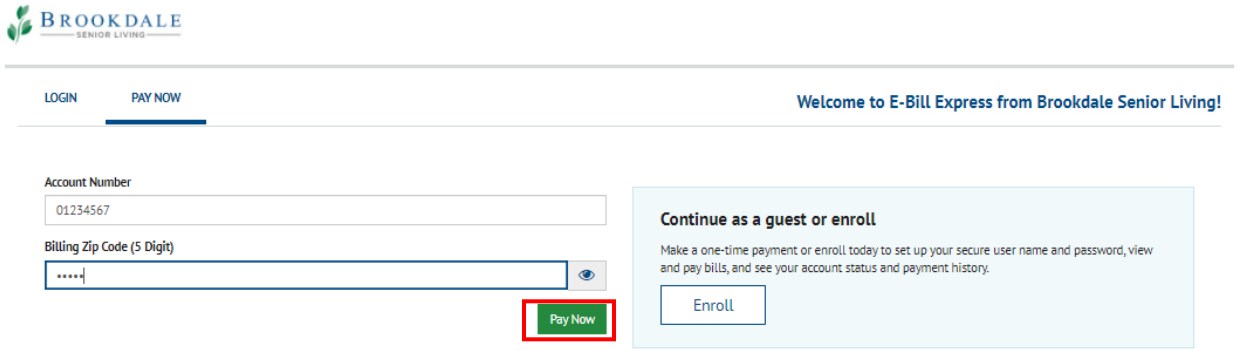


Payments on Non-Registered Accounts

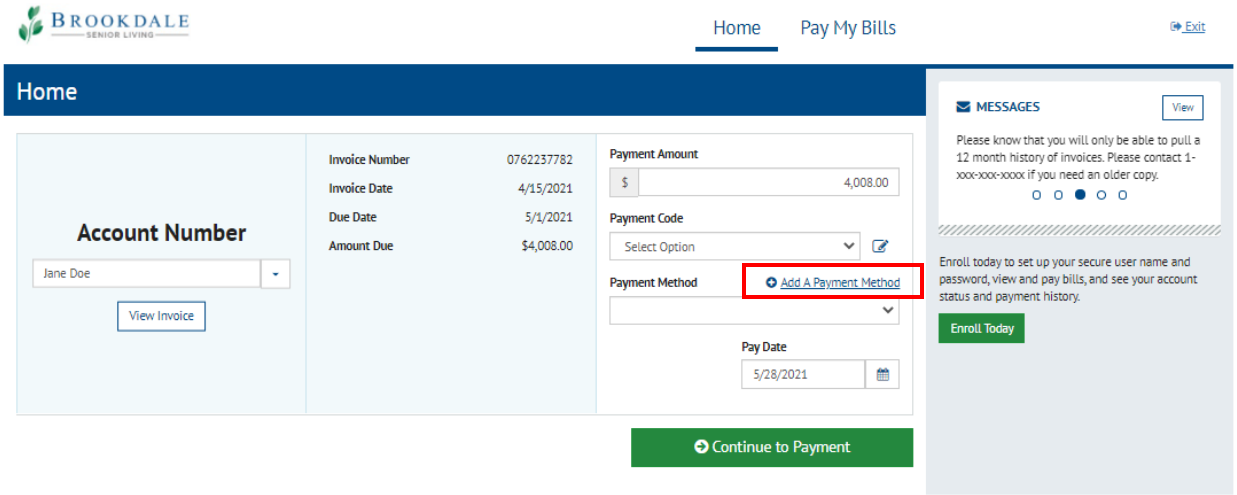
1. If a user would prefer not to register and instead just make a one-time payment, they can initiate from the home screen by selecting the Pay Now option.



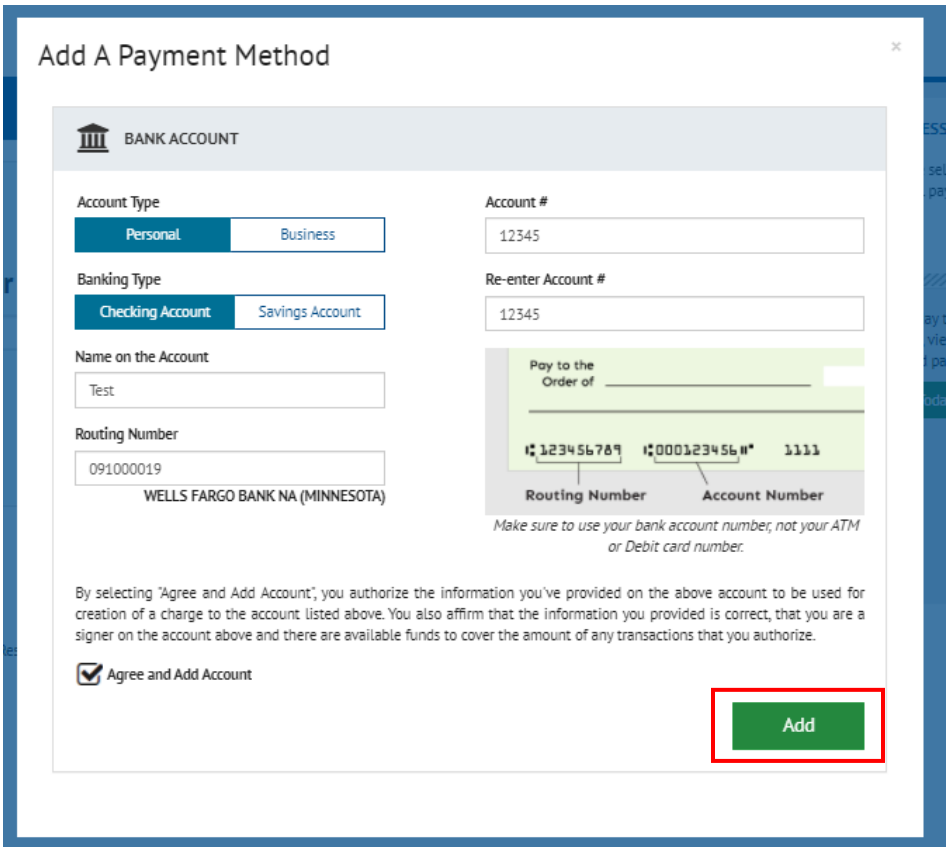
2. From the pay now screen complete the account validation information of 8 digit account number and billing zip code, then select pay now.



3. From the payment screen add a payment method to the account. Depending on the state the BU is located in, options of credit card and/or bank account will populate. This example shows a bank account setup.



4. When the account information has been entered and terms have been agreed to, select add to continue.



5. If the user is making a partial payment, at this point they can edit the invoice amount and leave the necessary comment. Date can also be edited as needed if future dating is required. Then continue to payment to complete.

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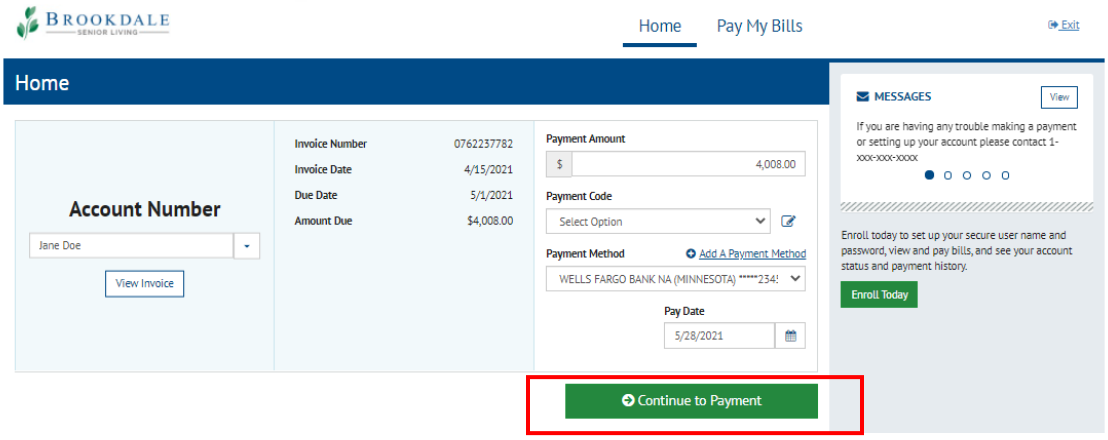
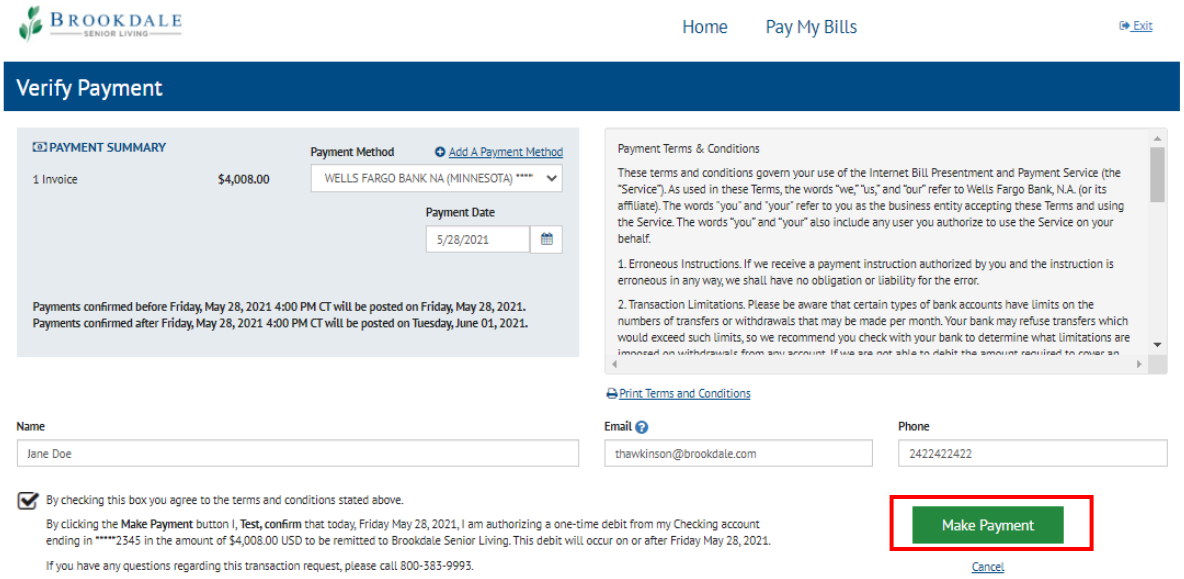
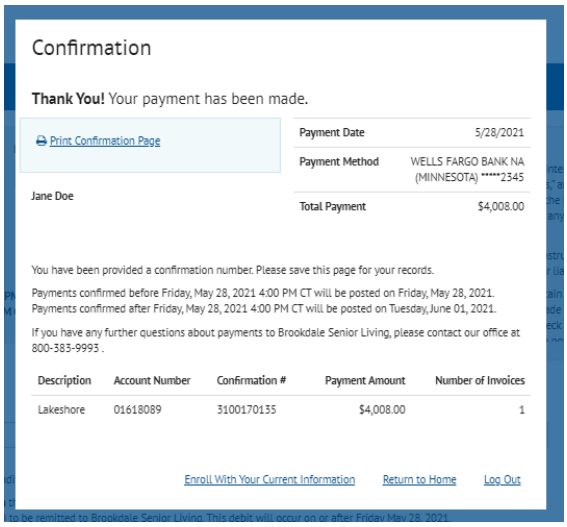


6. From the confirmation screen the user will enter in their contact email and phone number. They will also agree to the terms, and any fees that may be associated with a card payment.



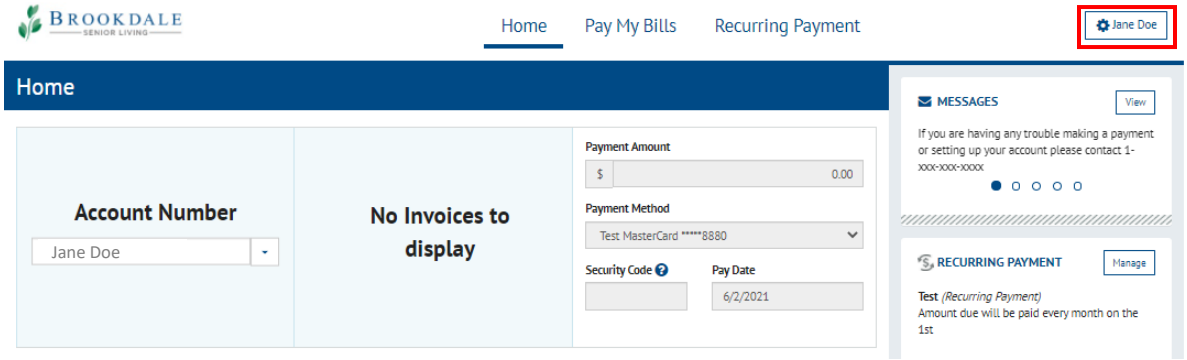
7. The user will receive a confirmation page when the payment has been submitted.



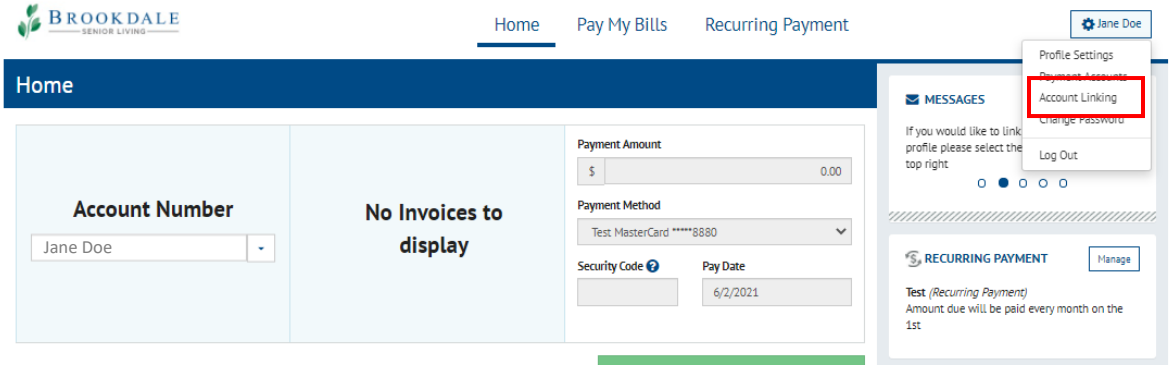
Linking Accounts

If one party is responsible for multiple accounts (most commonly a first and second person) they can link the two profiles to one payment portal login.

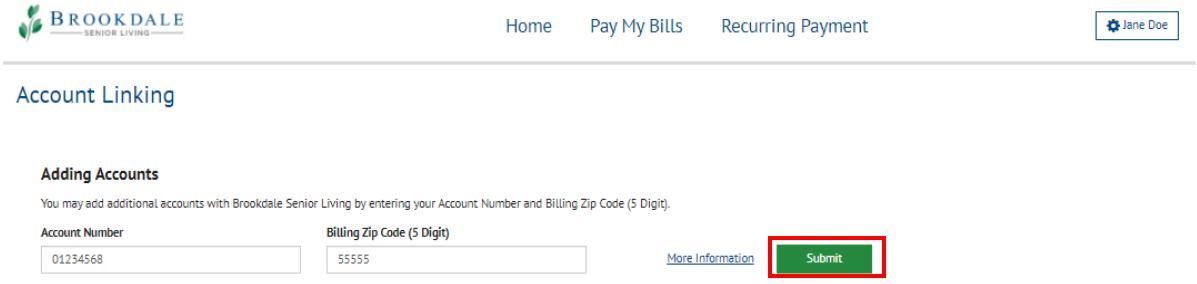
1. Register one account number as outlined earlier in this guide, and log into that account. Then select the gear icon next to the name in the top right corner.



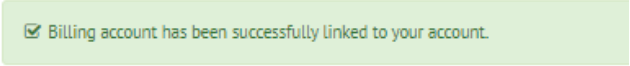
2. Select the Account Linking option from the menu.



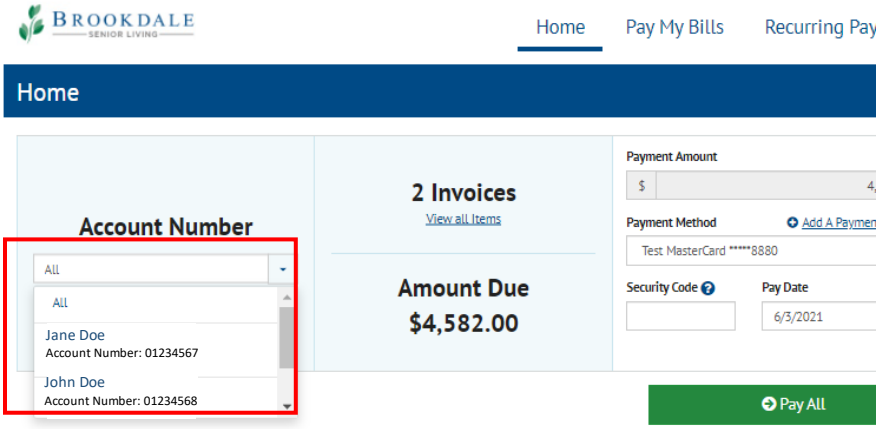
3. To link two accounts to one portal login, add in the new account number and the billing zip code, and click submit.



4. A pop up will confirm the second account has been linked.



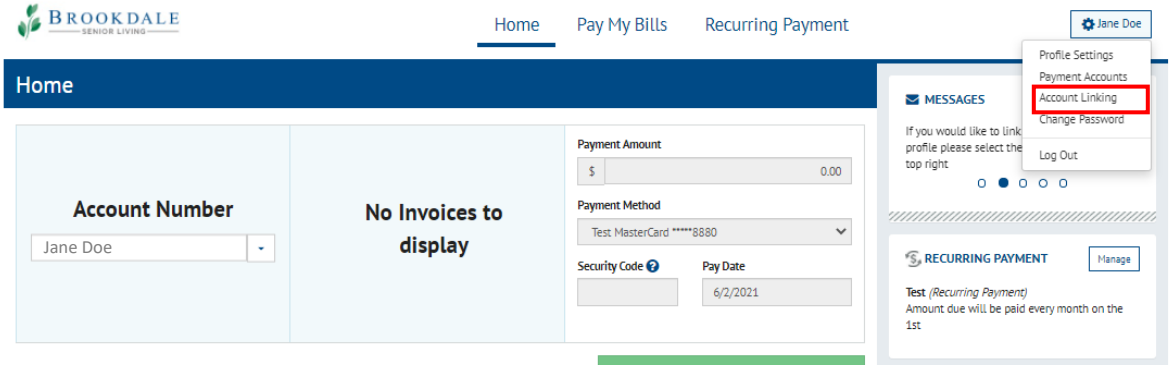
5. Returning to the home screen the user will be able to use the drop down box to view each account separately, or select the all option to view all invoices.



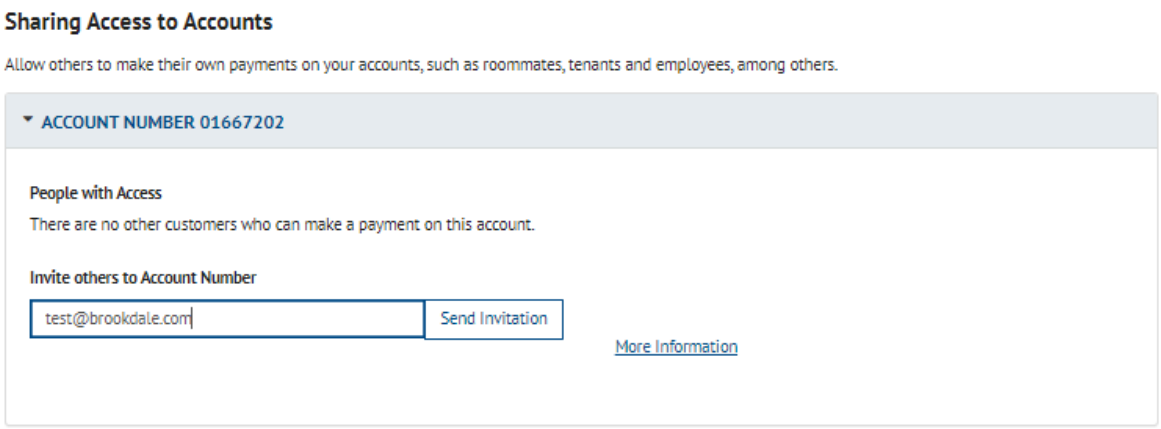
Inviting Additional Users to Access an Account

If the user would like to invite another party to also view and make payments on the account, they can add that party through the portal as well. For example if the resident's two children are going to share the payment responsibility, one can register and add the second.

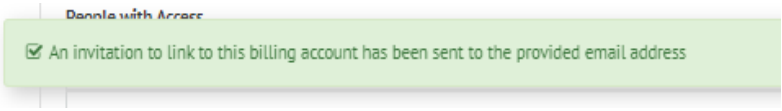
1. Register the account for the first party as outlined earlier in this guide, and log into the system. Select the gear icon for settings in the top right corner and select the Account Linking option.



2. The user will scroll to the Sharing Access header and enter in the email address they would like to share the account with.



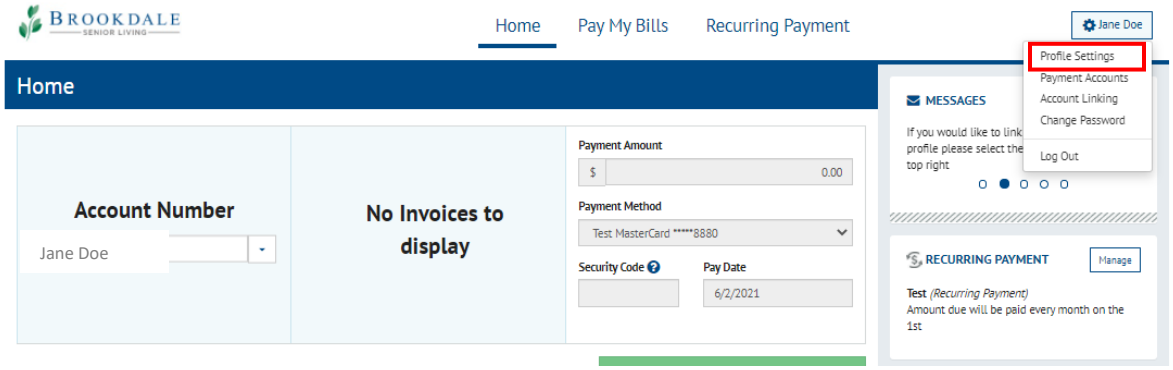
3. A pop up box will confirm the invitation was sent, and that party will receive an email to set up a profile.



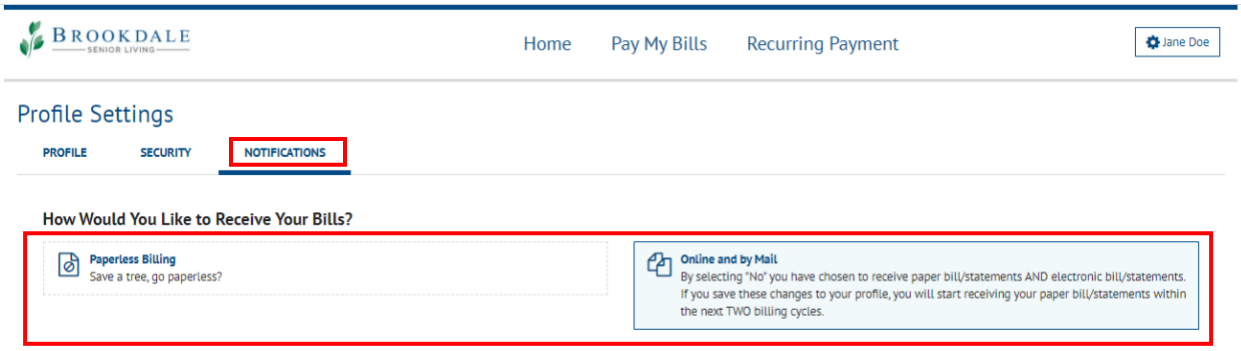
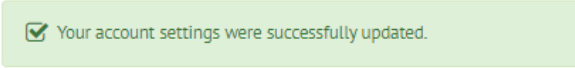
Updating Paperless Invoicing Settings

If a registered user would like to change their paper/paperless settings on their profile, this can be done via the account settings menu. Unregistered users can select paper vs. paperless during the registration process. Please note all registered users will have access to electronic invoices, the flag only needs to be updated if paper invoices should be discontinued.

1. Log into the portal and select the gear icon in the top right corner. Select the "Profile Settings" option.



2. The user will select the notifications option along the top menu bar of the screen, and then update the paperless flag as needed to choose either paperless billing or both electronic and by mail.



3. The user will select to apply changes, and settings will update.