

## **MOVE MONEY OPTIONS**

### Transfers to other PSB&T Accounts

Click New Transaction

Select the account you want to move money FROM

Select the account you want to move money TO

Complete the Details fields and click Continue

Review the Transfer Details and if you agree, click Submit

### Bill Payments

#### **Payee is already entered**

Click New Transaction

Select the account you want to move money FROM

Select the Payee from the list

Complete the Details, and click Continue

Review the Payment and if you agree, click Submit

#### **Adding Payees to the My Accounts page under Quick Pay**

Click on the Payee and click Add Favorite

Go to View Accounts and the Payee will appear under Quick Pay

When reviewing your list of Payees, those with a Star appear under Quick Pay

#### **Adding a New Payee**

Click New Transaction

Select the account you want to move money FROM

Select the Recipient or click New Payee

If you select New Payee, click Bill Pay

Select Company or Individual

For **Company** payees, complete the fields and click Add Payee

Complete the Details, and click Continue

Review the Payment and if you agree, click Submit

For **Individual** payees, complete the fields and select one of three options.

1. Let Them Provide Bank Info
  - a. This allows you to send the Recipient, or Payee, an email and upon receipt the individual will open the email, enter the Secret Code and enter the bank information.
  - b. Complete the payment Details, select Let Them Provide Bank Info, enter their email address and Secret Code.
  - c. Once the individual has entered the Secret Code and their bank information you will receive an email letting you know and then you may initiate a payment to them. For any future payments, unless they have changed bank or accounts, you may initiate payments to them without any action on their behalf.
    - i. The Secret Code is something you give to them and they must type it as you did when setting up the payment. There are no requirements of minimum length of characters and can be numbers and or letters.
  - d. When you are ready to send them a payment, click New Transaction, Select the account you will transfer the money FROM, select the Payee name, complete the Details page, review the payment and Submit.
2. I'll Provide Bank Info
  - a. Normally this option is used to transfer money to an account you have at another financial institution, or to a family member. In these situations, you will likely already have the bank information but if you do not the recipient will need to provide it to you.
  - b. Enter the bank information and click Add Payee.
  - c. Complete the Details, and click Continue
  - a. Review the Payment and if you agree, click Submit
3. Check
  - a. Complete the fields and click Add Payee
  - b. Complete the Details, and click Continue
  - c. Review the Payment and if you agree, click Submit