

## NorthStar Setup Requirements

### Account Gateway: Customer Setup

Customers wishing to pay via ACH must be set up in Account Gateway.

For ACH to function, customers' banking information is required in the Payment Plan table.

Customers may sign-up through

- A. MyAccount, or
- B. Directly with utility staff

**NOTE:** ACH sign-up through MyAccount is the safest and most secure method of providing banking information to the utility.

Additionally, MyAccount prevents the following risks:

- Incorrect banking data entry by utility staff
- Secure storage of data sensitive paper forms

Account Gateway > Pay Plan/Arrangements > Payment Plan

The screenshot displays the 'Account Management View (BROWSE) ACTIVE' window. The top navigation bar includes search, edit, and navigation icons, along with a page indicator '11 of 850'. Below the navigation bar are two tabs: 'Quick Info' and 'Account Details'. The 'Account Info' section contains fields for 'Account' (110 22), 'Name' (RG1 Cust 11), and 'Customer' (110), with an 'Active' checkbox checked. The 'Service Address' section includes 'House #' (110), 'Mod' (S), 'Street' (SYCAMORE ST), 'City' (ANYTOWN), 'State' (WI), and 'Zip' (53). Below this is a 'Ready' status indicator and a 'Payment Plan (BROWSE)' window. The 'Payment Plan' window has a '0 of 0' page indicator and a 'Total' field. It contains three main sections: 'Authorization Summary' with fields for 'Pre-authorized', 'Last PAP', and 'Max Withdraw Amt'; 'Payment Method' with radio buttons for 'Bank Account' and 'Credit Card', and input fields for 'Bank / branch' and 'Bank account'; and 'Account Status' with fields for 'Opened', 'Closed', 'Removed', and 'Reason'.

## Sign-up through MyAccount

To sign-up through MyAccount, customers must have an active online account.

Upon logging in to their account, a pop-up window appears with four (4) options.

- **Pay My Bill**
- **My Usage**
- **My Billing History**
- **Manage My Services**

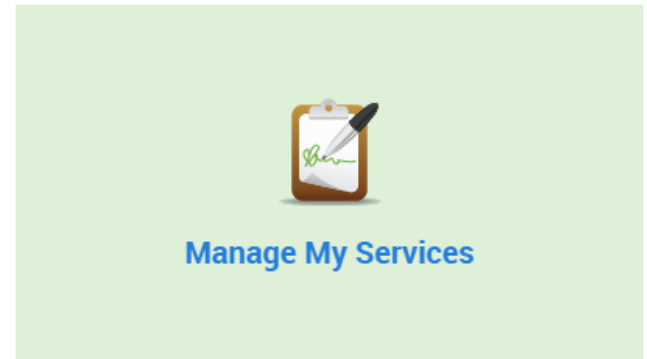
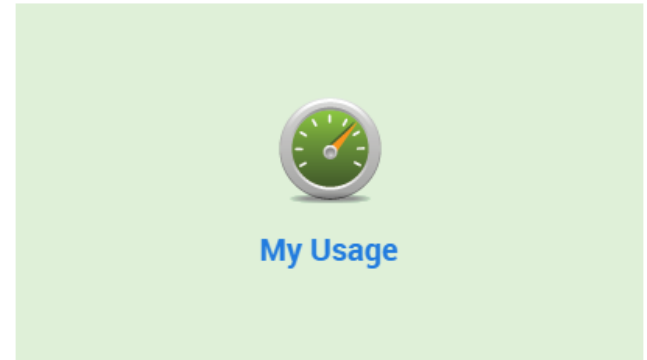
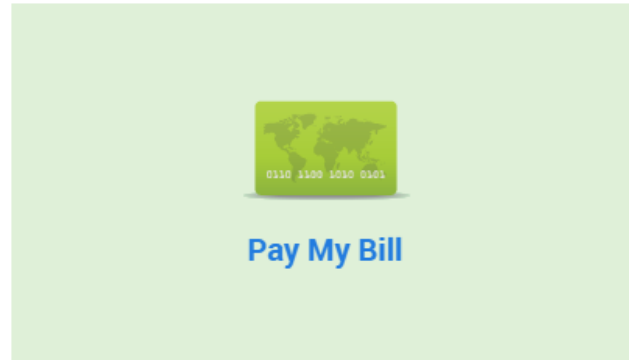
They may click **Pay My Bill** on this window or close the window.

If they close the window, they will select **View/Pay Bill** from their home screen.

## My Account



Select from options to pay your bill, view your energy (and water) usage, see your payment history and manage your services. Our online account management system offers paperless billing and Autopay.



The customer may enroll by clicking one of two buttons:

- **Manage Auto Pay** (see below) or
- **Enroll in Auto Pay** (see page 5)

**Manage Bill Delivery** **Manage Auto Pay**

**Account# 110-22**  
RG1 CUST 11  
110 S SYCAMORE ST ANYTOWN WI 53123  
(920) 222-5555  
[Update](#)

Enrolled in Email  
[Communication Preferences](#)

**\$ 0.00**  
Due 6/29/2020  
\$160.00 Paid on 3/30/2020  
[PAY BILL](#)

[\\$ Enroll in Auto Pay](#)

[View Latest Bill](#)

Filter By Entry Type:  From:  To:  [Filter](#)

Date ↑↓	Description ↑↓	Usage ↑↓	Period Ending ↑↓	Total Usage ↑↓	Due Date ↑↓	Amount ↑↓	Bill Amount Due ↑↓	Bill # ↑↓	View ↑↓
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By clicking **Manage Auto Pay**, a pop-up window appears, requesting them to select the account they wish to enroll in Auto Pay.

The customer verifies:

1. The Enroll in Auto Pay button is highlighted in blue, and
2. Check the box next to the account they wish to enroll.

When steps above are completed, the customer clicks Next.

### Manage Auto Pay

[Enroll in Auto Pay](#) [Cancel Auto Pay](#)

Select accounts to enroll in Auto Pay: [Select All](#) | [Deselect All](#)

**Account# 110-22**  
RG1 CUST 11  
110 S SYCAMORE ST ANYTOWN WI 53123  
(920) 222-5555

[Close](#) [Next](#)

The **Manage Auto Pay** pop-up window appears.

The customer begins by selecting the Payment Method of their choice:

- Credit, or
- Bank Account

The customer then proceeds to fill in the corresponding banking or credit card data.

When done, the customer clicks OK to save and submit the Auto Pay form.

*Note: If a customer selects 'Credit,' the member's 3<sup>rd</sup> party payment solutions provider (PSN, Paymentus) processes the payment.*

## Manage Auto Pay



By using this service, you authorize and re-authorize Columbus Water & Light each month to initiate and instruct its financial institution to debit your designated payment account and remit those funds to Columbus Water & Light for payment of your monthly bill. Please review the [Terms & Conditions](#) for this service. Contact us with any questions at [cwl@columbuswater&light.com](mailto:cwl@columbuswater&light.com)

**If you choose Auto Pay using your bank account, please enroll at least five days before your current due date to ensure that your bill is paid. This payment option is FREE.**

**If you choose Auto Pay using a credit card, each monthly payment will be charged a processing fee of \$2.95. If you enroll in Auto Pay using a credit card, your first payment will schedule with your NEXT bill. Please pay your current statement.**

### Payment Method

Credit  Bank Account

Type:

Name:

Bank Name:

Routing Number:

Bank Account Number:

Confirm Bank Account Number:

Nickname:

Payment Amount:  Pay Bill Amount  Pay Fixed Amount

Payment Timing:  Pay on Bill Due Date  Pay on Day of the Month

After the customer submits the Payment Method form, the NorthStar Payment Plan table auto-populates as shown in the example with the customer's banking information.

**Note:** Bank account and credit card numbers automatically encrypt.

Auto-populated fields include:

- **Pre-authorized**
- **Payment Method**
  - Bank Account, or
  - Credit Card (not typically used through NS)
- **Account Status**
  - Opened

The **Last PAP** field does not auto-populate.

- If left blank, a Pre-note file will generate.
- If pre-note files are *NOT* used, perform an *Advanced Find* with search criteria listed below.
  - Pre-authorized = 'Y' (yes) AND
  - Last PAP = 'NULL' (blank)

Any accounts matching the search criteria require editing the Last PAP date field. Enter the Last PAP date used for the cycle each account is in.

NorthStar > Account Gateway > Pay Plan/Arrangement > Payment Plan

The screenshot displays the 'Account Management View (BROWSE) ACTIVE/PAP' interface. At the top, it shows 'Waupun Default (110-22)'. Below this, there are two main sections: 'Account Info' and 'Service Address'. The 'Account Info' section includes fields for 'Account' (110 22), 'Name' (RG1 Cust 11), and 'Customer' (110). The 'Service Address' section includes 'House #' (110), 'Street' (SYCAMORE ST), 'Region', 'City' (ANYTOWN), and 'Home' and 'Bus' fields. Below these is a 'Ready' status indicator. The main section is titled 'Payment Plan (BROWSE)' and shows a 'Total' of 0.00. It has tabs for 'Pay Plan', 'Details', 'Equal Chgd', and 'Screen Audit'. The 'Authorization Summary' section includes 'Pre-authorized' (Y), 'Last PAP' (dropdown), and 'Max Withdraw Amt'. The 'Payment Method' section has radio buttons for 'Bank Account' (selected) and 'Credit Card'. The 'Bank Account' section includes 'Bank / branch' (07500022) and 'Bank account' (\*\*\*\*\*442). The 'Account Status' section includes 'Opened' (2020-06-17), 'Closed' (dropdown), 'Removed' (dropdown), and 'Reason' (text field).

## Sign-up via Utility Staff

Utility staff enters customer provided banking data to setup ACH payments.

From Account Gateway, **locate** the enrolling customer's account.

Open the **Payment Plan** table within the **Pay Plan/Arrangements** folder.

Click the **Add** icon.

Complete the sections shown below:

### Authorization Summary

- **Pre-authorized** = 'Y' (yes)
- **Last PAP**
  - Generate pre-note file:  
Leave field blank
  - NO Pre-note file = Enter the Last PAP date used for the account's cycle.

### Payment Method (select one)

- **Bank Account**
  - Bank / Branch
  - Bank Account (account number auto-encrypts)
- **Credit Card**
  - Click Credit Card button to enter card data.

### Account Status

- **Opened** = ACH start date

Click **OK** to save.

Account Gateway > Pay Plan/Arrangements > Payment Plan > Pay Plan

Waupun Default (110-22)

**Account Management View (BROWSE) ACTIVE/PAP**

Quick Info Account Details

**Account Info**

Account: 110 22 Active:

Name: RG1 Cust 11

Customer: 110

**Service Address**

House #: 110 Mod: S Street: SYCAMORE ST

Region: City: ANYTOWN

Home: Bus:

Ready

Payment Plan (EDIT)

Total: 0.00

Pay Plan Details Equal Chgd Screen Audit

**Authorization Summary**

Pre-authorized: Y

Last PAP: 2020-06-17

Max Withdraw Amt:

**Payment Method**

Bank Account

Bank / branch: 075000022

Bank account: \*\*\*\*\*442

Search Bank

Credit Card

Credit Card

Via Payment Integrator:

**Account Status**

Opened: 2020-06-17 Closed:

Removed: Reason: