Setting Up, Editing, and Deleting Recurring Payments
Quick Reference Guide

This guide walks you through setting up, editing, and deleting a recurring payment schedule as a registered user.

Set Up Recurring Payments (page 2)
- Pay with e-check
- Schedule monthly, quarterly, semi-annual, and annual recurring payments to be made on the day of your choice
- Choose an expiration date or leave it open-ended until you decide to cancel the schedule

Edit Recurring Payments (page 10)
- Update your payment amount as dues change
- Change a schedule's payment date, recurrence, and expiration date
- For a schedule with a defined expiration date, edit the payment dates and amounts within the schedule

Delete Recurring Payments (page 15)
- Delete the full schedule
- For a schedule with a defined expiration date, delete individual payments within the schedule
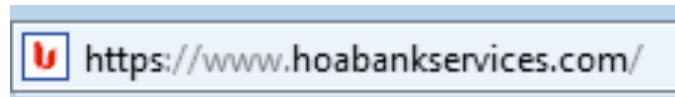
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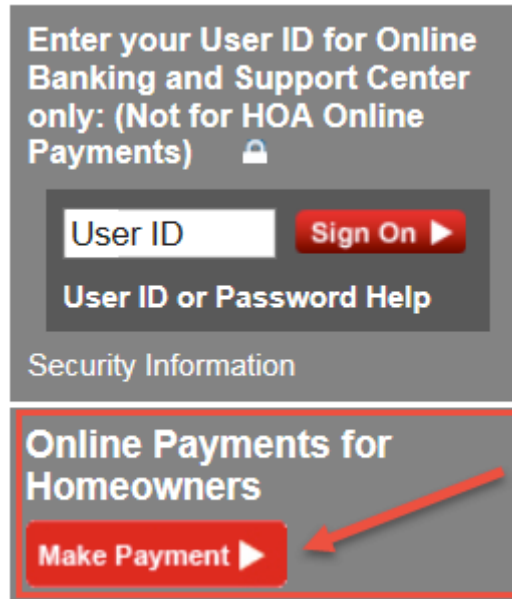
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Set Up New Recurring Payments

Go to **HOABankservices.com**

U https://www.hoabankservices.com/

Under the **Online Payments for Homeowners** section on the left-hand navigation bar, click **Make Payment**

Enter your User ID for Online Banking and Support Center only: (Not for HOA Online Payments) 🔒

User ID [ ] **Sign On ▶**

User ID or Password Help

Security Information

Online Payments for Homeowners

Make Payment ▶

Enter your **Username** and **Password**

Click **Login**

NOTE: For **first time logins**, you will be asked to select and answer 3 **forgotten password** questions and **3 enhanced security** questions

For help logging in the first time, click **Help** (to the right of Returning User) to refer to the First-Time Login Quick Reference Guide

Returning User   Help

Username [ ]

Password [ ]

Login   Forgot your password?   Forgot your username?

Find your property profile under **My Properties**

My Properties

Add a New Property

ABC Test Association - Rental

Delete Property

Property Profile

Property Location	City, PA
Management Company	Community Management, Inc.
Homeowners Association	ABC Test Association
Homeowners ID	12345

Recurring Payments

You don't have recurring payments set up yet.

| Set up Recurring Payment | Make a One-Time Payment | View Payment Details/History |

Click **Set up Recurring Payment** from within the property profile

Recurring Payment for the ABC Test Association

| Payment | Verify Schedule | Authorize | Confirm |

* Indicates required fields.

Property	Help

The setup page will open and reflect the Association and Homeowner ID information entered at registration

NOTE: If you are making payments for multiple properties, verify that you have chosen the correct association profile

Homeowners Association	ABC Test Association
Management Company	Community Management, Inc.
Homeowner ID	12345
Property Location	City, PA

Scroll down to the **Billing Information** section

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Complete the required **Billing Information** fields

Click in the **Same as Registered Address** box if the information is the same as the registration information.

NOTE: If the incorrect information is prefilled, you can update any field

Billing Information

☑ Same as Registered Address

First Name *

First

Last Name *

Last

Address Line 1 *

1111 Street

Address Line 2 (Optional)

City *

City

State *

Pennsylvania ⌄

Zip *

11111

Contact Number * (Do not enter hyphens or spaces)

1112223333

Email *

First@last.com

Define when and how often the payments should be made by complete the following fields:

Payment Day: The payment day of the month

Frequency: Every 1, 3, 6, or 12 months

Start date: Date the requested schedule should be effective

End date:

– Enter the date the last payment should be made

　OR

– Choose to continue until you change or cancel the recurring schedule

Recurrence

Payment Day	1st of the Month

Frequency	Every Month
	Every 3 Months
	Every 6 Months
	Every 12 Months

Start Date	11/12/2018

End Date	OR	Choose Expiration Date
		Until I change or cancel this payment

Enter the Payment Amount

Payment Information

Payment Amount	$125.00

Choose the bank account number from the **Payment Method** dropdown

Payment Method	⌄

Business Account Checking xxxxx7456

Click **Save Recurring Payment**

Back   Save Recurring Payment

NOTE: If this is the first time you are making a payment as a registered user, click the **Add New Bank Account** link and complete the bank information fields to add additional accounts

Payment Method	⌄

Add New Bank Account

Add a New Bank Account   ✕

* Indicates required fields.

Click the **Checking Account** or **Savings Account** radio button to select the account type

⦿ Checking Account   ◯ Savings Account

Note: If the savings and checking routing and account numbers are the same your payment will default to the checking account for payment.

NAME
ADDRESS
CITY, STATE ZIP   Date:

PAY TO THE
ORDER OF $

SAMPLE ONLY

BANK NAME
ADDRESS
CITY, STATE ZIP   DOLLARS

FOR

⑆123456789⑆ 0123456789012⑈ 0123

Routing Number   Account Number   Check Number

Enter and re-enter your **Routing Number**

Routing Number *
`123123123`

Re-enter Routing Number *
`123123123`

Enter and re-enter your **Account Number**

Account Number *
`987456`

Re-enter Account Number *
`987456`

For savings, credit union, money market and business accounts, please check with your financial institution to verify the correct numbers to use for electronic transfers.

Enter a **Nickname** for the bank account

Nickname *
`Mom`

Click **Save**

Cancel   Save

Payment Information

Choose the newly added account number from the **Payment Method** dropdown

Payment Amount $125.00

Payment Method   ⌄

Mom Checking xxxxx7654

Click **Save Recurring Payment**

Back   Save Recurring Payment

Verify the following Payment Schedule and make any revisions.

NOTE: If you defined an expiration date, you will be taken to the **Verify your Schedule** page

	Date	Amount	#
☐	11 / 14 ⌄ / 2018	$1,221.00	Delete
☐	12 / 6 ⌄ / 2018	$1,221.00	Delete

If you have no expiration date, you cannot edit individual payments and will be taken to the **Debit Authorization Agreement** page

Debit Authorization Agreement

By typing my name in the box below, I **First Last** hereby authorize Union Bank Homeowners Association Services eCheck to process the electronic ACH transactions to debit my Checking account, account number **xx7654** with Your Financial Institution, routing number **xxxxxx123** payable to **ABC Test Association** .

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Recurring Payment for the Falling Water Homeowners Association Inc

| Payment | Verify Schedule | Authorize | Confirm |

If you defined an expiration date, verify the list of individual payments in your schedule and select **Submit Payments**

Verify your Schedule

Verify the following Payment Schedule and make any revisions.

Refer to the Editing Recurring Payments section to edit dates and amounts of specific payments

	Date	Amount	#
☐	11 / 14 ⌄ / 2018	$1,221.00	Delete
☐	12 / 6 ⌄ / 2018	$1,221.00	Delete
☐	1 / 4 ⌄ / 2019	$1,221.00	Delete
☐	2 / 6 ⌄ / 2019	$1,221.00	Delete

Extend Schedule Through: Choose a Month ⌄ Extend

Back Delete Selected **Submit Payments**

Please click Submit Payments or your schedule will not be processed

Recurring Payment for the ABC Test Association

Authorize Your Payment

| Payment | Verify Schedule | Authorize | Confirm |

* Indicates required fields.

Debit Authorization Agreement

By typing my name in the box below, I **First Last** hereby authorize Union Bank Homeowners Association Services eCheck to process the electronic ACH transactions to debit my Checking account, account number **xx7456** with Your Financial Institution, routing number **xxxxxx123** payable to **ABC Test Association**.

Enter your first and last name in the **Authorization: Type Your Name Here:** field

* Authorization: Type Your Name Here: First Last

Back **Authorize**

Click **Authorize**

Please click Authorize or your schedule will not be processed

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A confirmation message will appear letting you know that the e-check payment was successful

My Properties | My Profile | My Billing Info | FAQs | Welcome, First ! | Sign Out

Recurring Payment for the ABC Test Association

| Payment | Verify Schedule | Authorize | **Confirm** |

Thank you!

Keep the **Confirmation #** for future research, if necessary

A confirmation email will be sent to the email address provided from Union Bank Homeowners Association Services. Save the email confirmation for possible future research.

Confirmation# 797945

You should also be receiving an email confirmation shortly.

Your recurring payment has been completed successfully.

Homeowners Assocation	ABC Test Association
Management Company	Community Management, Inc.
First and Last Name	First Last
Homeowner ID / Account Number	1111
Billing Address	1111 Street City, PA 11111
Today's Date:	11/12/2018
Date of First Payment	11/13/2018
Amount of First Payment	125.00

Return to Home Page   **Logout**

Click on the **My Properties** tab at the top of the page to verify your recurring payment

You will see your next scheduled **Recurring Payments** information

My Properties | My Profile | My Billing Info | FAQs | Welcome, First ! | Sign Out

My Properties   **Add a New Property**

ABC Test Association - Rental   **Delete Property**

Property Profile		Recurring Payments	
Property Address	City, PA	Next Payment	11/13/2018
Homeowners Association	ABC Test Association	Payment Day	1
Management Company	Community Management, Inc.		
Homeowners ID	12345	Pay From	xxxxx7456
		Amount	$125.00

Edit Recurring Payment   **Make a One Time Payment**   **View Payment Details/History**

Edit Recurring Payments

To edit your schedule, click on **Edit Recurring Payment** within the Property Profile

The setup page will open and reflect the selected **Property** information

Scroll down to the **Billing Information** page

Billing Information

☐ Same as Registered Address

First Name *
First

Last Name *
Last

Address Line 1 *
1111 Street

Address Line 2 (Optional)

City *
City

State *
Pennsylvania

Zip *
11111

Contact Number * (Do not enter hyphens or spaces)
1112223333

Email *
First@last.com

Edit Billing Information fields, as necessary

Edit any of the following **Recurrence** fields:

Payment Day: Which day of the month

Frequency: Every, 3, 6 or 12 months

Start date: Date the requested schedule should be effective

End date:

– Enter the date the last payment should be made

  OR

– Choose to continue making payments until you change or cancel the recurring schedule

Recurrence

Payment Day   1st of the Month ⌄

Frequency   Every Month ⌄

Every 3 Months

Every 6 Months

Every 12 Months

Start Date   11/12/2018 ⌄

End Date   OR   ○ Choose Expiration Date ⌄
                    ⦿ Until I change or cancel this payment

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Edit any **Payment Information**, as necessary

Click on **Save Recurring Payment**

NOTE:

If you set an expiration date, you will be taken to the **Verify your Schedule** page where you may continue to edit each individual payment

If you have no expiration date, you cannot edit individual payments and will be taken to the **Authorize** page

Payment Information

Payment Amount	$125.00
Payment Method	Business Account Checking xxxxx745 ∨
	Add New Bank Account

Back   **Delete Recurring Payment**   **Save Recurring Payment**

Verify the following Payment Schedule and make any revisions.

	Date	Amount	#
☐	11 / 14 ∨ / 2018	$1,221.00	Delete
☐	12 / 6 ∨ / 2018	$1,221.00	Delete

Debit Authorization Agreement

By typing my name in the box below, I **First Last** hereby authorize Union Bank Homeowners Association Services eCheck to process the electronic ACH transactions to debit my Checking account, account number **xx7654** with Your Financial Institution, routing number **xxxxx123** payable to **ABC Test Association**.

If an expiration date was defined, you may edit specific payments within the schedule, as necessary

NOTE: The dates in the dropdown only contain bank weekdays (no weekend or holiday dates)

Edit the date:

– Choose the **Date** dropdown
– Choose a different date
– Place a checkmark to the left of the payment
– Select **Submit Payments**

Edit the Amount

– Enter a new **Amount**
– Place a checkmark to the left of the payment
– Select **Submit Payments**

Extend your schedule for as many months as you like.

– Choose the dropdown
– Choose a Month/Year
– Select **Extend**

The additional dates will appear as part of the schedule

You may also access the specific payments by clicking on the **Next Payment** date link within the property profile

Recurring Payment for the ABC Test Association

| Payment | Verify Schedule | Authorize | Confirm |

Verify your Schedule

Verify the following Payment Schedule and make any revisions.

	Date	Amount	#
☐	11 / 14 / 2018	$1,221.00	Delete
☑	12 / 20 / 2018	$1,221.00	Delete
☑	1 / 4 / 2019	$1,000.00	Delete
☐	2 / 6 / 2019	$1,221.00	Delete
☐	5 / 6 / 2019	$1,221.00	Delete
☐	6 / 6 / 2019	$1,221.00	Delete
☐	7 / 5 / 2019	$1,221.00	Delete
☐	8 / 6 / 2019	$1,221.00	Delete
☐	9 / 6 / 2019	$1,221.00	Delete
☐	10 / 4 / 2019	$1,221.00	Delete
☐	11 / 6 / 2019	$1,221.00	Delete
☐	1 / 6 / 2020	$1,221.00	Delete

Extend Schedule Through: January 2020   **Extend**

| Back | Delete Selected | Submit Payments |

Please click Submit Payments or your schedule will not be processed

ABC Test Association - Rental   **Delete Property**

Property Profile

Property Address   City, PA

Recurring Payments

Next Payment   11/13/2018

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Authorize Your Payment

Recurring Payment for the ABC Test Association

Payment	Verify Schedule	Authorize	Confirm

* Indicates required fields.

Debit Authorization Agreement

By typing my name in the box below, I **First Last** hereby authorize Union Bank Homeowners Association Services eCheck to process the electronic ACH transactions to debit my Checking account, account number **xx7456** with Your Financial Institution, routing number **xxxxxx123** payable to **ABC Test Association**.

Enter your first and last name in the **Authorization: Type Your Name Here:** field

* Authorization: Type Your Name Here:

First Last

Back   **Authorize**

Click **Authorize**

Please click Authorize or your schedule will not be processed

A confirmation message will appear letting you know that the e-check payment was successful

My Properties	My Profile	My Billing Info	FAQs	Welcome, First !	Sign Out

Recurring Payment for the ABC Test Association

Payment	Verify Schedule	Authorize	Confirm

Thank you!

Keep the new Confirmation # for records for future research, if necessary

Confirmation# 797945

You should also be receiving an email confirmation shortly.

A confirmation email will be sent from Union Bank Homeowners Association to the email address provided. Save the email confirmation for future research.

Your recurring payment has been completed successfully.

Homeowners Assocation	ABC Test Association
Management Company	Community Management, Inc.
First and Last Name	First Last
Homeowner ID / Account Number	1111
Billing Address	1111 Street City, PA 11111
Today's Date:	11/12/2018
Date of First Payment	11/13/2018
Amount of First Payment	125.00

Return to Home Page   Logout

Delete Recurring Payments

To delete a specific payment within a schedule, you must have previously defined an expiration date versus leaving the schedule open-ended

Access the specific payments by clicking the **Next Payment** date link within the property profile

| My Properties | My Profile | My Billing Info | FAQs | Welcome, First ! | Sign Out |

My Properties

Add a New Property

ABC Test Association - Rental

Delete Property

Property Profile

Property Address	City, PA
Homeowners Association	ABC Test Association
Management Company	Community Management, Inc.
Homeowners ID	12345

Recurring Payments

Next Payment	11/13/2018
Payment Day	1
Pay From	xxxxx7456
Amount	$125.00

| Edit Recurring Payment | Make a One Time Payment | View Payment Details/History |

| | Payment | Verify Schedule | Authorize | Confirm |

Verify your Schedule

Verify the following Payment Schedule and make any revisions.

	Date	Amount	#
☐	11 / 14 ▾ / 2018	$1,221.00	Delete
☑	12 / 6 ▾ / 2018	$1,221.00	**Delete**
☐	1 / 4 ▾ / 2019	$1,221.00	Delete
☐	2 / 6 ▾ / 2019	$1,221.00	Delete

Place a checkmark to the left of the payment to be deleted

Extend Schedule Through: Choose a Month ▾   Extend

Click **Delete Selected**

OR

Back   **Delete Selected**   Submit Payments

Please click Submit Payments or your schedule will not be processed

Click **Delete** in the line you would like deleted

	Date	Amount	#
☐	11 / 14 ▾ / 2018	$1,221.00	Delete

Click **OK** in the pop-up to confirm you want to delete the payment

Message from webpage

? Are you sure you want to delete these items?

OK   Cancel

The payment line will no longer be reflected in the schedule

	Date	Amount	#
☐	11 / 14 ▾ / 2018	$1,221.00	Delete
☐	1 / 4 ▾ / 2019	$1,221.00	Delete
☐	2 / 6 ▾ / 2019	$1,221.00	Delete

Extend Schedule Through: Choose a Month ▾   Extend

Select **Submit Payments**

Back   Delete Selected   **Submit Payments**

Please click Submit Payments or your schedule will not be processed

Authorize Your Payment

Recurring Payment for the ABC Test Association

| Payment | Verify Schedule | Authorize | Confirm |

* Indicates required fields.

Debit Authorization Agreement

Enter your first and last name in the **Authorization: Type Your Name Here:** field

By typing my name in the box below, I **First Last** hereby authorize Union Bank Homeowners Association Services eCheck to process the electronic ACH transactions to debit my Checking account, account number **xx7456** with Your Financial Institution, routing number **xxxxxx123** payable to **ABC Test Association**.

* Authorization: Type Your Name Here:

First Last

Click **Authorize**

Back   Authorize

Please click Authorize or your schedule will not be processed

A confirmation message will appear letting you know that the e-check payment was successful

| My Properties | My Profile | My Billing Info | FAQs | Welcome, First ! | Sign Out |

Recurring Payment for the ABC Test Association

| Payment | Verify Schedule | Authorize | Confirm |

Keep the new Confirmation # for records for future research, if necessary

A confirmation email will be sent from Union Bank Homeowners Association to the email address provided. Save the email confirmation for future research

Thank you!

Confirmation# 797945
You should also be receiving an email confirmation shortly.

Your recurring payment has been completed successfully.

Homeowners Assocation	ABC Test Association
Management Company	Community Management, Inc.
First and Last Name	First Last
Homeowner ID / Account Number	1111
Billing Address	1111 Street City, PA 11111
Today's Date:	11/12/2018
Date of First Payment	11/13/2018
Amount of First Payment	125.00

Return to Home Page   Logout

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To delete a Recurring Payment Schedule click **Edit Recurring Payment** within the property profile

My Properties

Add a New Property

ABC Test Association - **Rental**   **Delete Property**

Property Profile   **Recurring Payments**

Property Address	City, PA	Next Payment	11/13/2018
Homeowners Association	ABC Test Association	Payment Day	1
Management Company	Community Management, Inc.		
Homeowners ID	12345	Pay From	xxxxx7456
		Amount	$125.00

Edit Recurring Payment   **Make a One Time Payment**   **View Payment Details/History**

Recurring Payment for the ABC Test Association

The set up page will open and reflect the **Property** information

| Payment | Verify Schedule | Authorize | Confirm |

* Indicates required fields.

Property   Help

Homeowners Assocation	ABC Test Association
Management Company	Community Management, Inc.
Homeowner ID	12345
Property Location	City, PA

Scroll down to the bottom of the page

Click **Delete Recurring Payment**

Back   **Delete Recurring Payment**   **Save Recurring Payment**

Click **OK** in the pop-up that asks if you are sure you want to delete the payment

Message from webpage

Payment Amount

Are you sure you want to delete this?

Payment Method   ing xxxxx7654

Add New Bank Account

OK   Cancel

Back   **Delete Recurring Payment**   **Save Recurring Payment**

Your property profile will reflect that you no longer have any recurring payments

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