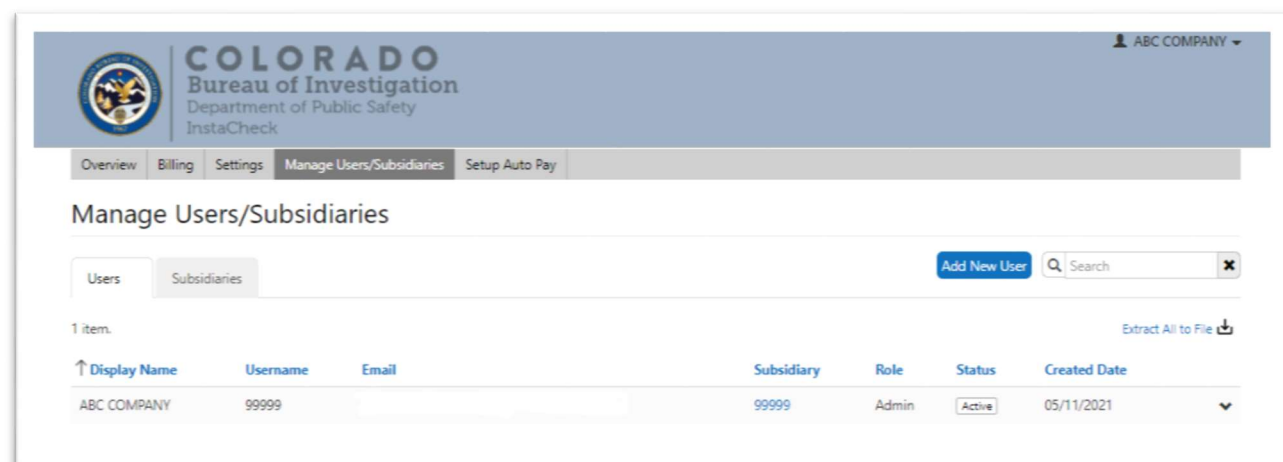


CBI SIMPLEPAY – CUSTOMER USER GUIDE: MANAGE USERS/SUBSIDIARIES

Step 1: After logging in to the system the overview screen will display your total account balance and due date.



Step 2: Open the Mange Users/Subsidiaries tab



SimplePay allows a customer administrator to add additional users to the account. The additional user may make payments and view invoices on behalf of the account.

SimplePay allows a corporate account to view and pay invoices for each of its subsidiaries. You can view the subsidiaries for your account by clicking on the Subsidiaries tab. If you would like help with setting up a single access to multiple accounts, please contact Financial Services at 303-239-4396

Step 3: To add a new user, click on the Add New User button on the Users tab

Step 4: Enter the users' first and last name along with their email address.

Add New User

Name (First Last)*

Email*

Confirm Email*

Add

Cancel

Step 5: The user will receive an email with further instructions

Dear Customer,

ABC COMPANY has invited you to join CBI SimplePay.


[Click here](#) to continue your registration for your account

If you have any questions please contact Financial Services at cdps_cbi_billing@state.co.us or at 303-813-5700, option 6.

Thank You,

Financial Services

InstaCheck Unit



COLORADO
Bureau of Investigation
Department of Public Safety

690 Kipling St, Suite 3000, Denver CO 80215

cdps_cbi_billing@state.co.us | www.colorado.gov/cbi

Step 6: The new user will complete the Register a New User process by confirming information



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InstaCheck

Register a New User

Name (First Last)*

DEF COMPANY

Account Number*

99999

Submit

Cancel

Confirm Agency Information

Agency Name ABC COMPANY

Agency Address 123 ABC LANE
PAYABLES
LAKEWOOD, CO 80215

Previous

Next

Step 7: The new user will create a username and password

Credentials

Username*

newuser

Email*

cdps_cbi_billing@state.co.us

Confirm Email*

cdps_cbi_billing@state.co.us

Password*

.....

Confirm password*

.....|

Previous

Next

Step 8: The new user will select and answer three security questions

Security Questions

Question #1*

-select-

Answer #1*

Question #2*

-select-

Answer #2*

Question #3*

-select-

Answer #3*

Previous

Submit

Step 9: The customer administrator will receive an email notifying them that a new user is ready for review and approval

Dear Customer,

A new user has registered under your CBI SimplePay account. Please log in to approve the new user.

[Click here](#)

Thank You,

Financial Services

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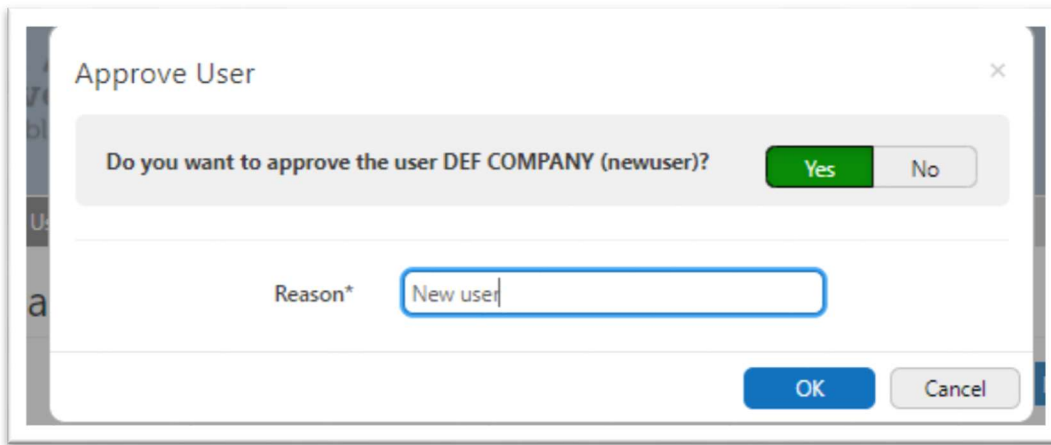
Step 10: Login to SimplePay and open the Manage Users/Subsidiaries tab

Step 11: Click on the drop down arrow next to the new user with a status of Pending Approval

The screenshot shows the SimplePay interface for the Colorado Bureau of Investigation. The header includes the CBI logo and the text "COLORADO Bureau of Investigation Department of Public Safety InstaCheck". The user is logged in as "ABC COMPANY". The navigation bar has tabs for Overview, Billing, Settings, Manage Users/Subsidiaries (selected), and Setup Auto Pay. The main section is titled "Manage Users/Subsidiaries" and has two tabs: Users (selected) and Subsidiaries. There is an "Add New User" button and a search bar. Below the tabs, it says "2 items." and "Extract All to File". A table lists the users:

Display Name	Username	Email	Subsidiary	Role	Status	Created Date
ABC COMPANY	99999		99999	Admin	Active	05/11/2021
DEF COMPANY	newuser	cdps_cbi_billing@state.co.us	99999	User	Pending Approval	05/12/2021

Step 12: Select Yes if you would like to approve the new user and enter a reason such as "new user".

A screenshot of a web application dialog box titled "Approve User". The dialog has a close button (X) in the top right corner. The main content area contains a question: "Do you want to approve the user DEF COMPANY (newuser)?". Below the question are two buttons: "Yes" (green) and "No" (grey). Below the buttons is a text input field labeled "Reason*" with the text "New user" entered. At the bottom right of the dialog are two buttons: "OK" (blue) and "Cancel" (grey).

Approve User

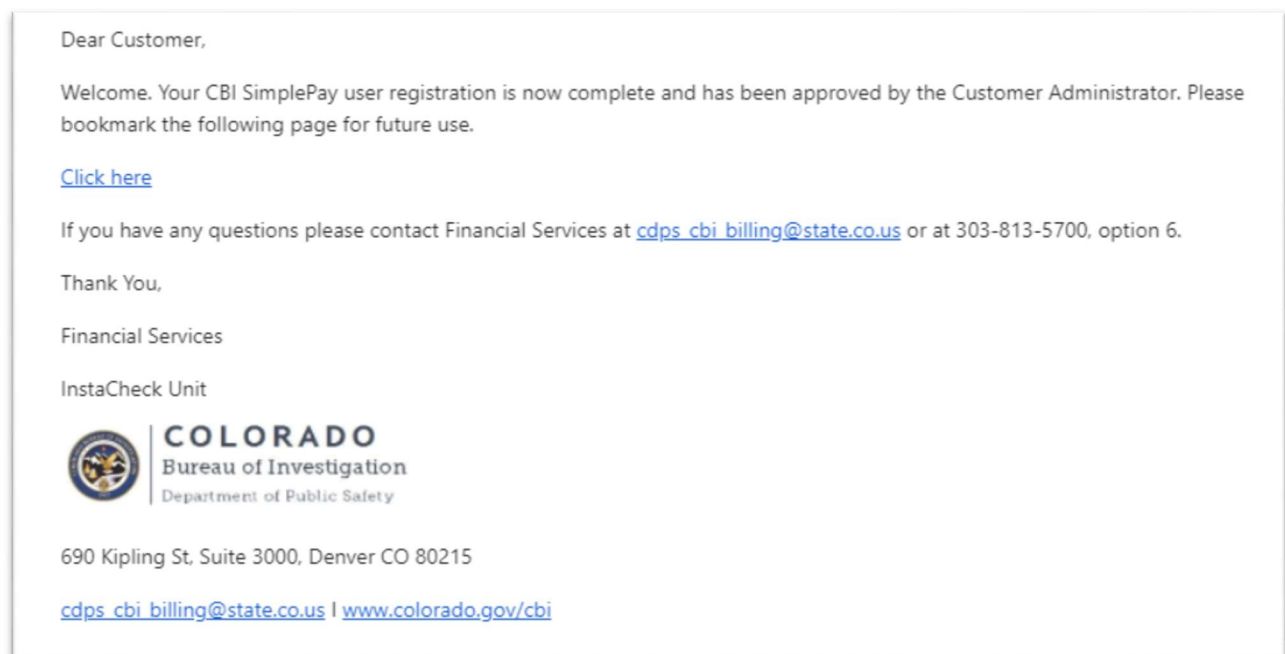
Do you want to approve the user DEF COMPANY (newuser)?

Yes No

Reason* New user

OK Cancel

Step 13: The new user will receive an email confirmation that their request has been approved

A screenshot of an email confirmation template. The text is as follows: "Dear Customer," followed by "Welcome. Your CBI SimplePay user registration is now complete and has been approved by the Customer Administrator. Please bookmark the following page for future use." Below this is a blue hyperlink "Click here". Then, "If you have any questions please contact Financial Services at cdps_cbi_billing@state.co.us or at 303-813-5700, option 6." followed by "Thank You," and "Financial Services". Below that is "InstaCheck Unit". The footer section includes the Colorado Bureau of Investigation logo, the text "COLORADO Bureau of Investigation Department of Public Safety", the address "690 Kipling St, Suite 3000, Denver CO 80215", and the contact information "cdps_cbi_billing@state.co.us | www.colorado.gov/cbi".

Dear Customer,

Welcome. Your CBI SimplePay user registration is now complete and has been approved by the Customer Administrator. Please bookmark the following page for future use.


[Click here](#)

If you have any questions please contact Financial Services at cdps_cbi_billing@state.co.us or at 303-813-5700, option 6.

Thank You,

Financial Services

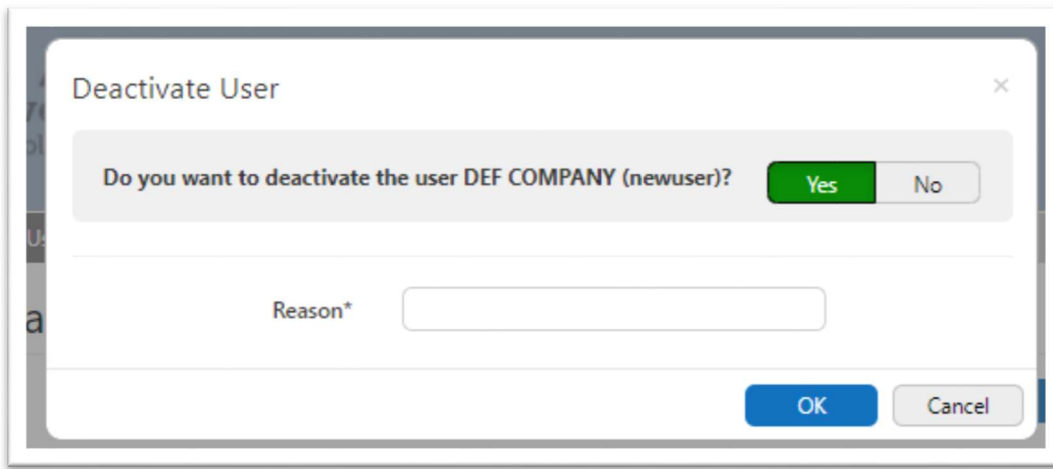
InstaCheck Unit

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Step 14: If you wish to cancel the users access to SimplePay you can do so by selecting the drop down arrow next to the user and selecting Deactivate. Select Yes and enter a reason such as "no longer employed" if you wish to deactivate the account.



A dialog box titled "Deactivate User" with a close button (X) in the top right corner. The main content area contains a question: "Do you want to deactivate the user DEF COMPANY (newuser)?" followed by two buttons: "Yes" (highlighted in green) and "No" (grey). Below this is a text input field labeled "Reason*". At the bottom right, there are two buttons: "OK" (blue) and "Cancel" (grey).

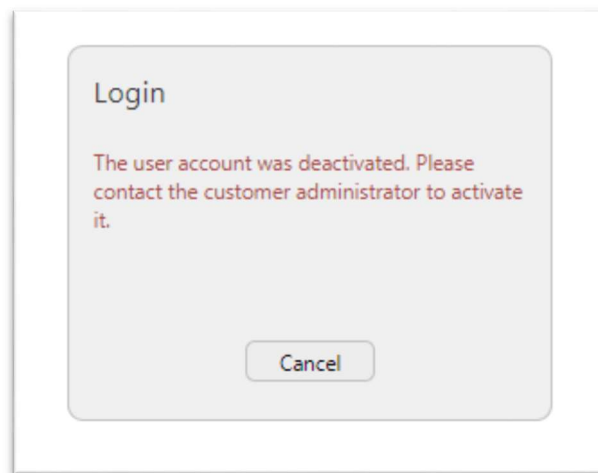
Deactivate User

Do you want to deactivate the user DEF COMPANY (newuser)? **Yes** No

Reason*

OK Cancel

Step 15: The user will no longer have access to the account and will be denied entry



A dialog box with a light grey background. The title "Login" is at the top. Below it is a red error message: "The user account was deactivated. Please contact the customer administrator to activate it." At the bottom center is a "Cancel" button.

Login

The user account was deactivated. Please contact the customer administrator to activate it.

Cancel