

Description:

For a new business submission, complete the billing account in PolicyCenter. The billing account information is created on the *Payment* screen, after a submission is quoted. The *Payment* screen is only visible for submissions in "Quoted" status.

On the *Payment* screen, you will have the option to create a new billing account or add the submission to an existing billing account.

After a policy is bound, a Billing Account Inquiry link in the **Info** bar allows you to launch directly to the Billing Account associated with the policy.

Des <u>k</u> top	Account ▼ Policy ▼ Search ▼ Team Administration ▼ Testing ▼ Training ▼ Live Chat for Agents
₽	📄 Policy File 🚓 Personal Auto Connecticut JOHN SMITH Account: 1662826021 Policy: 5106L 033032 In Force (Exp. 10/24/2022) Billing Account: Inquiry
^ [^]	Summary PrintID Card

This job aid includes the following sections:

- o Creating a new billing account
- o Adding to an existing billing account
- o Creating a billing account that is Third Party Mortgagee billed
- Creating a billing account that is Recurring EFT (REFT) billed

Click the links above to jump to each section.



Create a New Billing Account

 Once a submission is quoted and displayed on the <i>Quote</i> screen: Click the Finalize Quote button to submit the policy for processing. Note: The <i>Processing</i> screen may appear while validations and reports are running, when applicable Click the OK button on the confirmation popup window. On the <i>Payment</i> screen: Ensure the default New - Create new Billing account displays in the drop down menu to the right of the Billing Account field. In the Payment Schedule section of the payment screen the installment plan reflected will match what was selected on the Policy Info screen. Additionally, Bill & Document Delivery options will match what was reflected on the Policy Info screen as well. In this example the customer has selected Direct Billed and prefers to have their documents delivered via US Mail. Note: To update payment options and document deliver preferences, select the 'Edit' button and then the 'Policy Info itab to update to the customers preferences. 	Step	Action	Screen
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Create a Billing Account for a New Submission

4	 With the policy issued, notice it is now in <i>Submission (Bound</i>) status. Next, you will submit a down payment for the policy: Scroll down to the <i>Down Payment Details</i> section. In certain circumstances, a down payment is not required. Those circumstances include Billing to a 3rd Party Mortgagee and adding the policy to an existing billing account In other circumstances, a two-month or double-down payment may be required. If so, the Initial Down Payment amount may be more than expected. 	PolicyCenter** Degtop • Agcount (• Epidoy (• Search; (• Taxim Administration • Testing • Testing • Testing • Personal Lir getows Epidoy Center** Degtop • Agcount (• Epidoy (• Search; (•) Testing • Testing • Personal Lir Schmission 222357 Billing Account Billing • Billing • Billing • Personal Lir Palicy contract Palicy contract Billing Feature Billing Billing Feature Billing Personal Lir Palicy contract Billing Feature Host: Center new Billing account Billing Billing Billing Feature Billing Feature Billing Feature Billing Feature Billing Billing Billing Feature Billing Feature Billing Sender Pere C Enal Billing Feature Billing Feature Billing Sender Pere C Sender Pere C
5	 In the <i>Down Payment</i> section: Click the Add button. Select "Cash" from the drop-down list. Note: For steps to enter a zero-down payment, navigate to <u>Step 5</u> in the <i>Create a New Billing Account to Bill to a Third Party Mortgagee</i> section. 	Intel Activity Nation Process
6	 Review and complete all required fields in the <i>Down Payment Details</i> section. The Initial Down Payment field is the amount you must submit for a down payment. Enter the amount in the Amount field. Click the Submit Payment button. Note: All payments are completed when the Submit Payment button is selected. 	Tech Mathications Mathie Mathie <
7 Return to	The submission has been bound, the Billing Account set-up is successful, and payment is accepted. Notice the new Billing Account Number .	Desigtop Account Evilicy Search Team Administration Testing Training Submission (Bound) Submission (Bo



Add a Policy to an Existing Billing Account

If the policyholder already has an existing billing account, you can manually enter that account number and proceed with issuing the policy.

If changes to the Billing Account are required, you must make them to the existing billing account.

Step	Action	Screen
1	 Once the submission is quoted and in "Binding" status on the Payment screen: Select Other – Manually enter Billing account from the drop-down menu to the right of the Billing Account field. 	Desigtop Account Desigtop Account Desigtop Account Desigtop Account Desigtop Account Desigtop Account Desigtop Payment Case Desigtop Payment Sell Sell
2	 A new field for Account Number displays on the <i>Payment</i> screen. Manually enter the account number in the Account Number field. Complete the standard policy payment process. 	Desigop Account Billicy Search Imam Administration - Testing E @ @ o Account Billicy Search Imam Administration - Testing E @ @ o Account Billicy Search Imam Administration - Testing E @ @ o Account Billicy E Search Imam If effective (2/11/2021 Wereak Salt Account: 271721866 Payment Summary Poendum Summary Total Premium S421.32 Pethy Info Tase and Surcharges 0 Account: Wereak Salt Account I Cost S821.32 Wereas Billing Billing Billing Billing Billing Coverages Billing Coverages Billing Account Wereak Salt Poyment

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Create a New Billing Account to Bill to a Third-Party Mortgagee

The following steps outline how to create a Property submission billing account. This will include steps on sending the bill to the designated Third-Party Mortgagee.

Step	Action	Screen
1	 On the <i>Mortgagee/Billing</i> screen, add the appropriate mortgagee information. Select who will receive the bill: Click the down arrow to the right of the Current Bill To option. Select "First Mortgagee" from the Current Bill To drop-down list. 	Desjop • Account • Exicy • Search • Jean Administration • Testing • Training • Price Contraction Predice Predice Contraction Predice
2	 In this example, the First Mortgagee is also selected for the Renewal Bill To option: Click the <u>Quote</u> button. 	Desktop + Account + Bolicy + Search + Jean Administration + Testing + Training + Desktop + Account + Bolicy + Search + Jean Administration + Testing + Training + Desktop + Account + Bolicy + Search + Jean Administration + Testing + Training + Desktop + Account + Bolicy + Bolicy + Index Based - Bolicy + Undex K Sat Account : 27121868 Billiog Desktop + De
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Create a Billing Account for a New Submission

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Create a New Billing Account Recurring EFT (REFT)

The following steps outline how to set up a new billing account, using the REFT option, when Easy Pay Sign Up is selected.

Information entered on the *Installment Details* and *Recurring Payment Details* screens remains in the system to prevent you from needing to enter banking information twice. The defaulted fields can be edited in case the REFT banking information is not the same as the down payment information.

Once the EFT is set up, the member must return the Recurring EFT form to authorize withdrawal of funds from their specified account. This form may be eSigned or physically signed within 30 days of setup; if not signed within that period, billing automatically reverts to direct billed. Agents must ensure members comply with this mandate.

Step	Action	Screen
1	 On the <i>Policy Info</i> screen: Select the Yes radio button to the right of the Billing Payment Method field. Note: You will need to complete the required fields on the remaining screens to complete the submission. 	PolicyCenter® Preton Account PolicyCenter® PolicyCente® PolicyCenter® PolicyCente® PolicyCenter® Policy
	 In this example, the remaining information is completed for you: Click the <u>Quote</u> button. 	Comego Book Transfer Policy Both Transfer Policy
2	On the <i>Quote</i> screen:	Desistop + Account + Policy + Search + Team Administration + Testing + E C Account [+ Policy + Search + Team Administration + Testing + E C Account [+ Policy + Search + Team Administration + Testing + E C
	 Click the Finalize Quote button. Note: The <i>Processing</i> screen may appear while validations and reports are running, when applicable. Click the OK button on the confirmation popup window. 	Submission 10092144 QUOTe Fashing Contract Pathog Contract



Create a Billing Account for a New Submission

3	 On the <i>Payment</i> screen, complete all required fields: Click the Recurring EFT radio button for the Installment Plan 	PolicyClandae [®] Dougloop • Aground • (blog) • Saund, • Saund Johnsonzolinin • Technig • Presonal Lives Support Technings Support Submission Finded Polymone Polymone Polymone Submission Submissio
	 Click the Enter Installment Details button to enter payment information. Note: Recurring EFT will be the only Payment Schedule choice due to selecting "Yes" for the Recurring EFT (Monthly) for the Billing Payment Method field on the Policy Info screen. 	Allowards Bing Carliel, Bing
4	Select the box under the Recurring ACH Payment Authorization statement. Once selected, the required bank details will populate. Complete the required fields.	<complex-block></complex-block>
5	 On the Payment screen: Click the <u>Issue Policy</u> button. Follow <u>Steps 4-7</u> in the Create a New Billing Account section to add and submit the down payment. Note: The agent must ensure the member signs the Recurring EFT form within 30 days (either via eSignature process or a physical signature on a printed form returned to the agent) of the policy being issued. If the member does not sign the Recurring EFT form within 30 days, the billing for the policy reverts to direct-billed. Note: Information entered on the Recurring Payment Details screen in Step 4 automatically defaults to the corresponding fields on the Payment screens for the down payment. 	Desistop Account Desistop Account Desistop Account Desistop Account Desistop Account Desistop Account Desistop Account Desistop Account Desistop Account Desistop
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