# PL Billing Key Features (Agent Center)

## Home Page

Select a task or subtask to go to that specific page.




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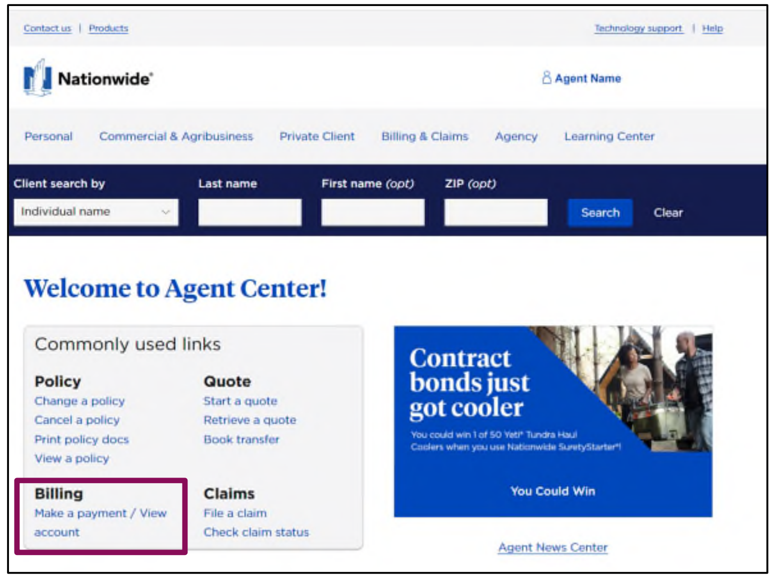
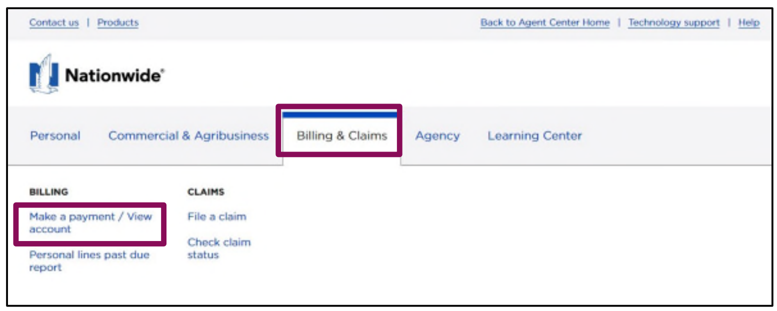
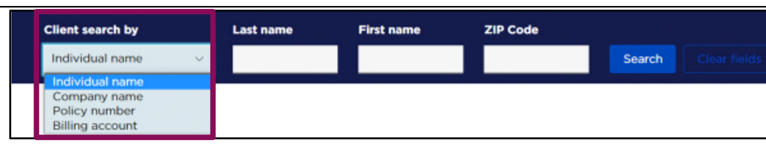
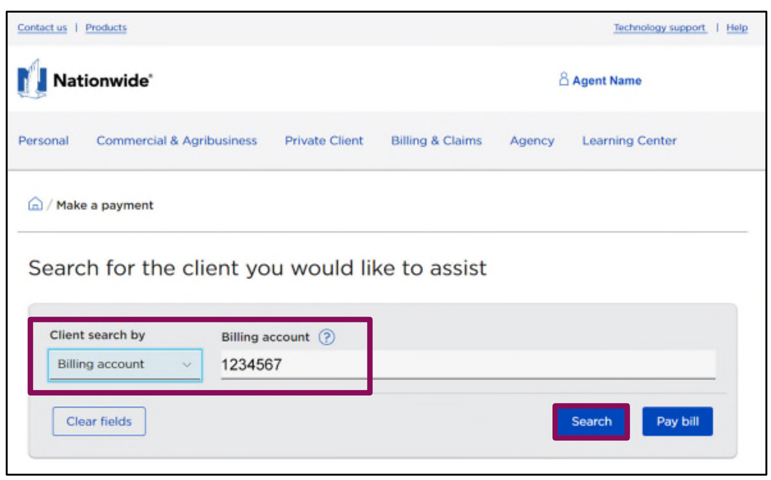
# Billing Inquiry
## Steps 1-4

| Action | Screen |
|---|---|
| 1. For a guided experience, select “Make a payment/ View account” in the “Billing” section of “Commonly used links” of Agent Center Workspace. |  |
| 2. There are several ways to get to billing screens. Another way is to select the “Billing & Claims” tab. Select “Make a payment/ View account” from the “Billing” section. |  |
| 3. For a full view of client information prior to paying a bill, use the “Client search by” dropdown. |  |
| 4. To search by billing account, key the billing account number and select “Search”. |  |

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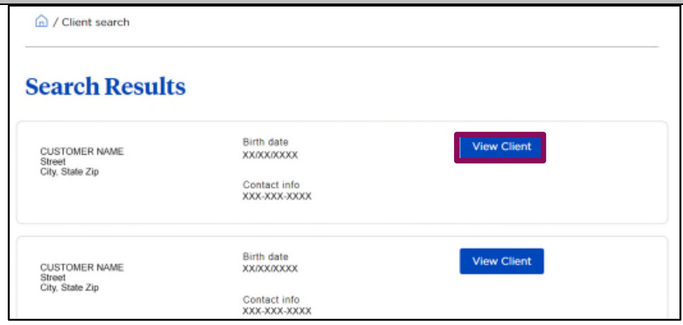
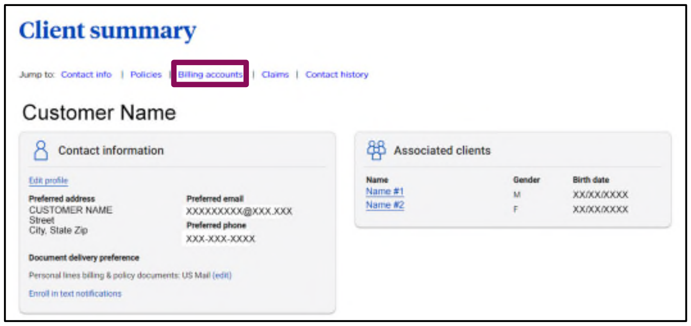
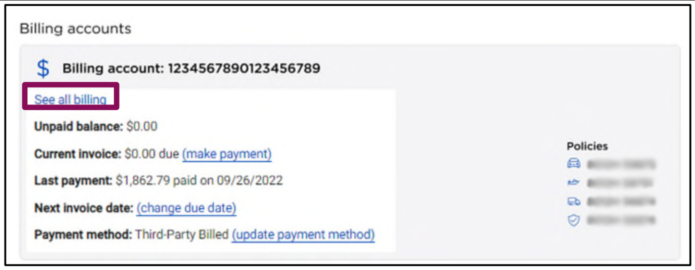
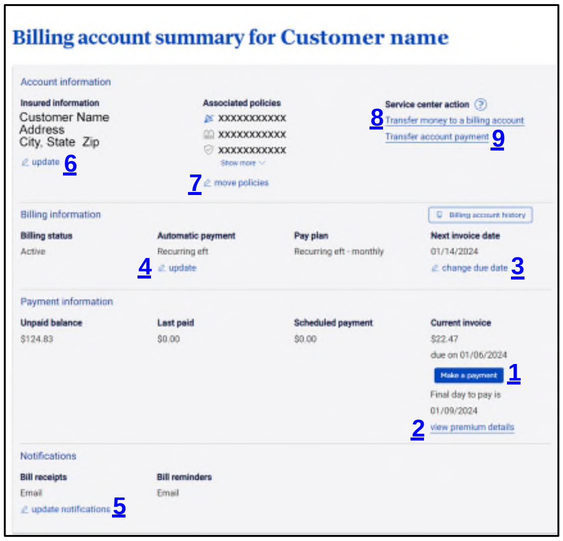
## Billing Inquiry (cont'd)

### Steps 5-7

| Action | Screen |
|---|---|
| 5. The search results display. Select the "View Client" button for the selected customer. |  |
| 6. The client summary displays. To perform common billing tasks, select the "Billing accounts" tile. |  |
| 7. You can link to common billing tasks by selecting the link to the desired task. For additional billing tasks, select "See all billing". |  |

## Billing Account Summary

| Action | Screen |
|---|---|
| "Billing Account Summary" displays and provides information on the billing account such as account information, billing information, payment information, etc.<br><br>**Select the number by the billing task to review its functionality.** |  |

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# Billing Account History

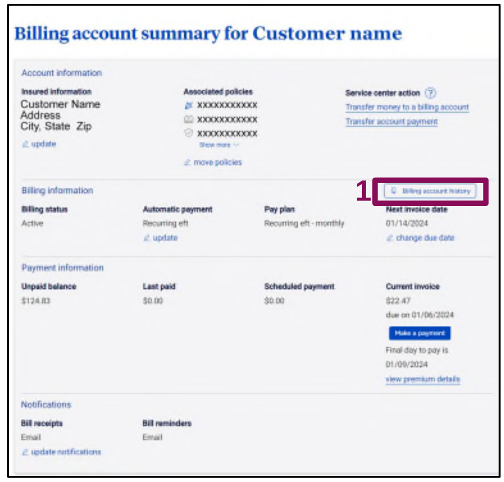
## Steps 1-4

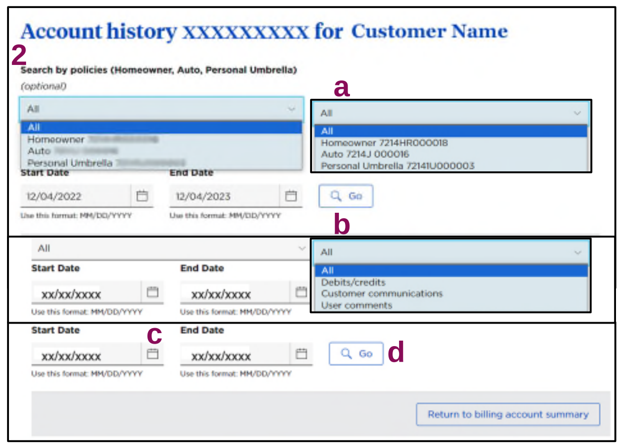
**Action**

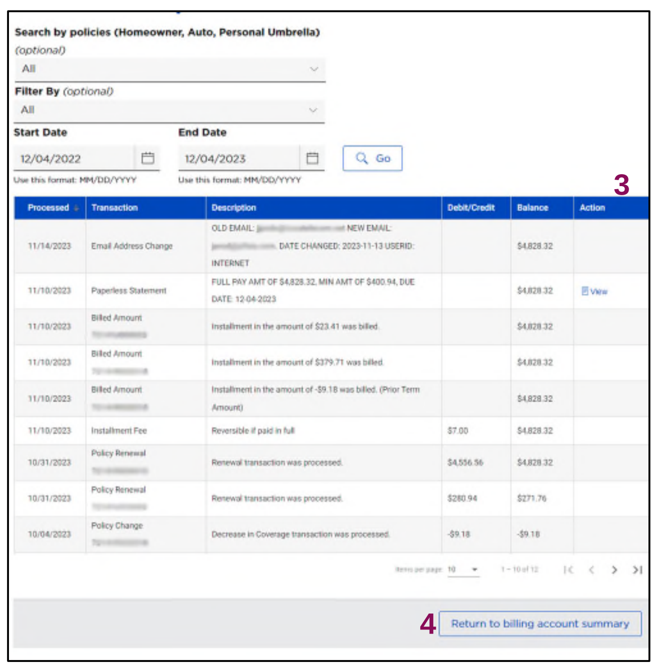
1. “Billing account history” provides transactions that have occurred on the account. To see this history, from “Billing account summary,” select the “Billing account history” button.

2. The “Account history” tab includes search features to refine the search.
    a. The “Search by policies” filter defaults to “All”. If you want to filter by a specific policy, select the dropdown to select the policy.
    b. “Filter by” defaults to “All”. To filter by a specific transaction, select the dropdown to select the transaction.
    c. The default timeframe is the last 90 days from the date the account history is accessed. To change the “Start Date” and “End Date,” select the calendar icons to change the dates.
    d. Once the search filters are changed, if applicable, select the “Go” button.
3. The search results display.
4. When finished, select the “Return to billing account summary” button.

**Screen**

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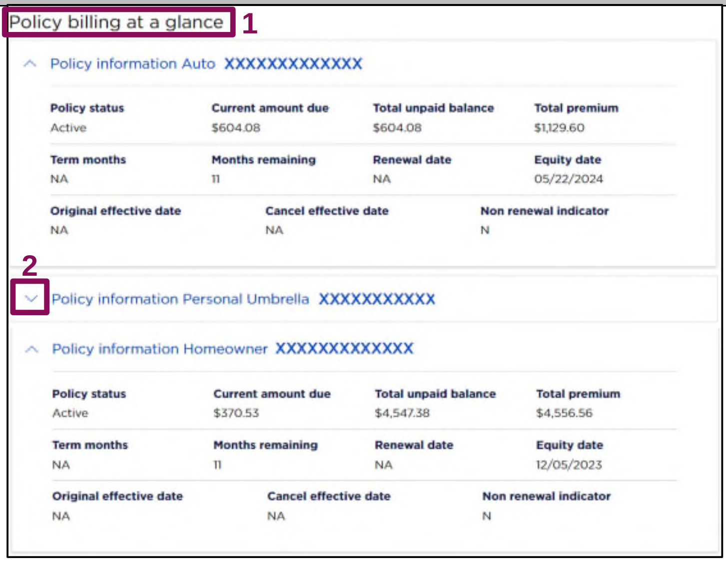
## Policy billing at a glance
### Steps 1-2

**Action**

1. You can view “Policy billing at a glance” below “Billing account summary”.
2. The policy/policies on the billing account display. You can select the “∨” to view the policy information for each policy.

**Screen**




## Make a Payment
### Billing Account- or Policy-Level Payments
### Steps 1-2

**Action**

1. Once you select “Make a Payment” from the Billing account summary or one of the other ways available to you, there are two “Make a Payment” options: “Billing Account-Level Payment” or “Policy-Level payment”.

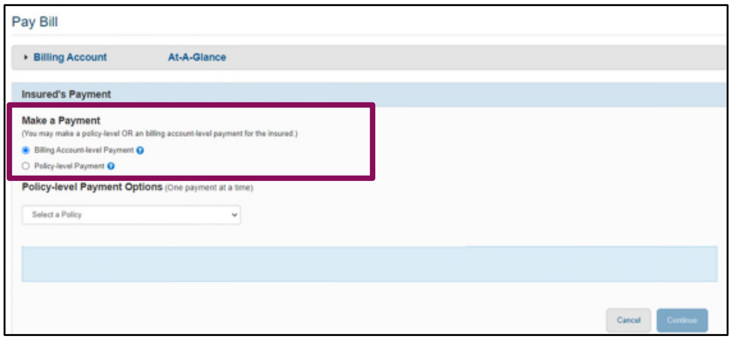
2. If there is more than one policy on an account, take the payment at the Account-Level. Agent Center Billing knows to spread the payment to each policy. If there is only one policy on an account, you can take the payment at the Policy-level or the Account-level.

NOTE: Account- vs Policy-Level makes a difference if:

- only one of the policies is past due (currently in non-pay status) OR
- the customer wants to pay more than the minimum.

If you choose Account-Level to pay, any overpayment will go to the account or toward future account bills.

**Screen**

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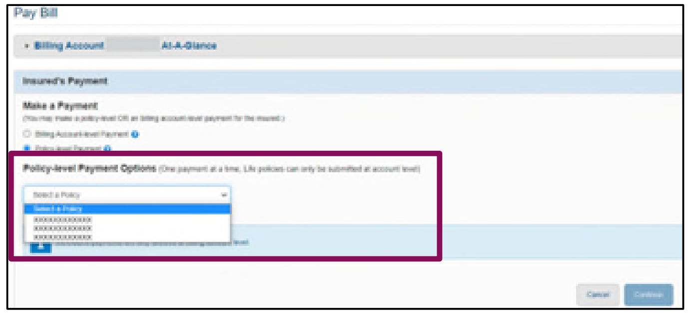
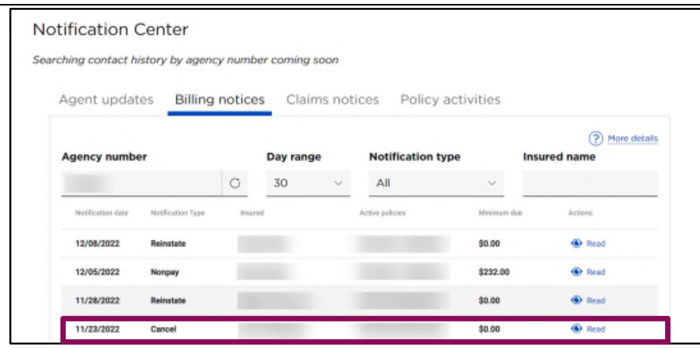
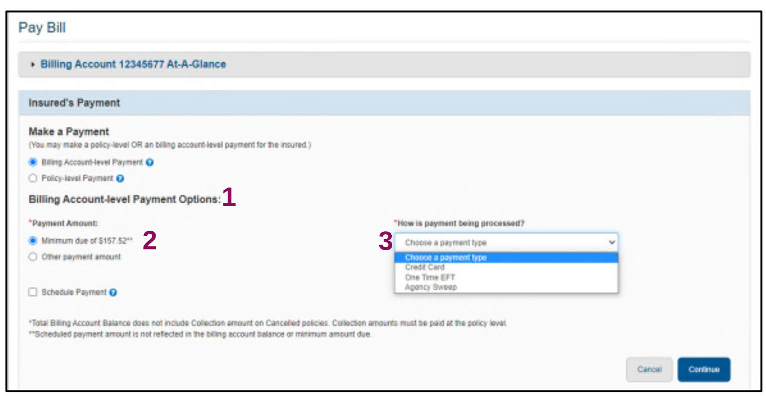
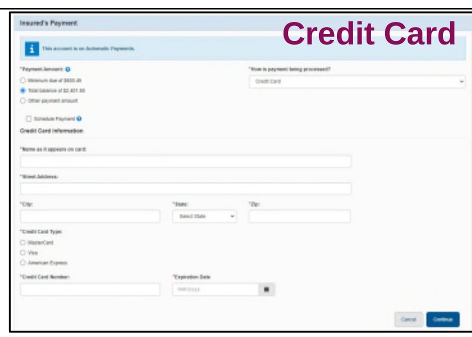
## Billing Account- or Policy-Level Payments (cont'd)
### Steps 3-4

| Action | Screen |
|---|---|
| 3. If policy level is selected, the system will show available policies to accept payment. Start by clearing any outstanding policy amount first. The payment would clear any outstanding amount due for that designated policy, and the remaining credit would be applied toward the policy balance rather than the account. |  |
| 4. In Agent Center, if the account is in "Cancel" status, you cannot make a payment on it. If you try to make an account-level payment for a cancelled account, you will receive messaging that no payment can be accepted. You will then need to contact the Service Center. |  |

## Make a Payment – Payment Types
### Steps 1-4a

| Action | Screen |
|---|---|
| 1. The screen displays payment options and any pending payments (previously submitted by you but not yet processed). If a policy is in warned status, you may see options to pay on the warned policy or policies.<br>2. To make a payment, select the appropriate minimum or total balance due, or choose to pay an "Other payment amount" on the policy or account.<br>3. Choose a payment type of Credit Card, One Time EFT or Agency Sweep. Complete the appropriate fields and select Continue. |  |
| 4. a. The credit card option appears on the "Insured's Payment" screen. Complete the credit card information and select "Continue".<br><br>Nationwide accepts the following credit cards:<br>✓ Visa,<br>✓ MasterCard,<br>✓ Discover, AND<br>✓ American Express |  |

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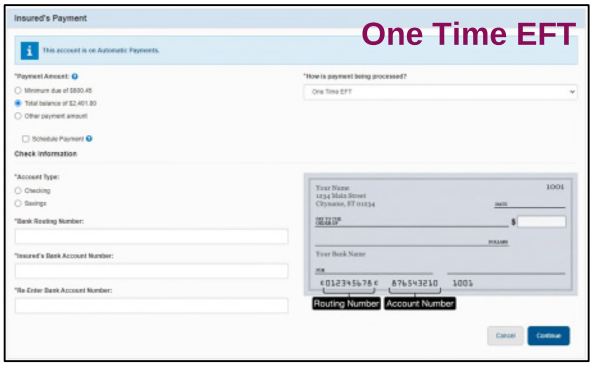
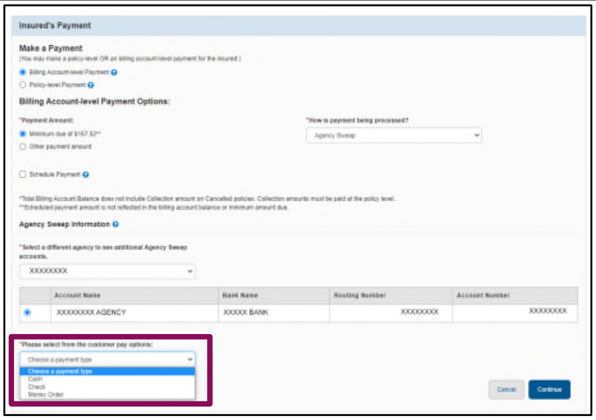
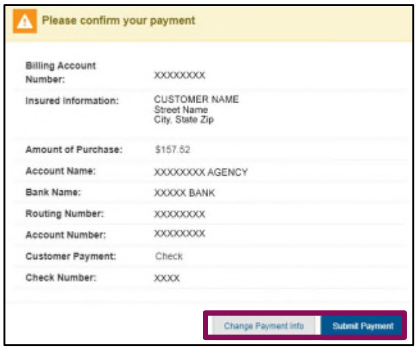
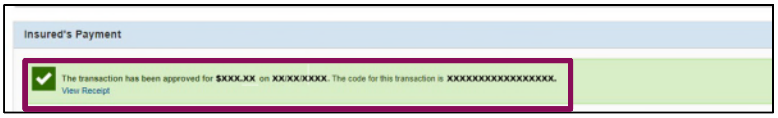
## Make a Payment – Payment Types (cont'd)
### Steps 4b-5

| Action | Screen |
|---|---|
| 4. b. The one-time EFT options appear on the "Insured's Payment" screen. Complete the insured's bank information based on the selected payment method and select "Continue". |  |
| 5. If you have set up an Agency Sweep account with Nationwide, you can also accept cash, check or money order payment. Complete the appropriate fields and select "Continue". |  |

## Make a Payment - Submit Payment
### Steps 1-2

| Action | Screen |
|---|---|
| 1. A confirmation window displays specifics on the amount and account information for all payment types. If inaccurate information is found, select the "Change Payment Info" button. If the information is accurate, select "Submit Payment". |  |
| 2. A successful transaction message displays with a confirmation code and a link to the receipt. Below the message are the details for the pending payment. |  |

IMPORTANT - Once you leave the Pay Bill page, the transaction message with the "View Receipt" link will no longer display. Select the "View Receipt" link to display the Conditional Receipt. It provides basic payment information, date submitted, account number, amount received, type of payment, insured information, agent and approval code. Print and retain the information for your records.

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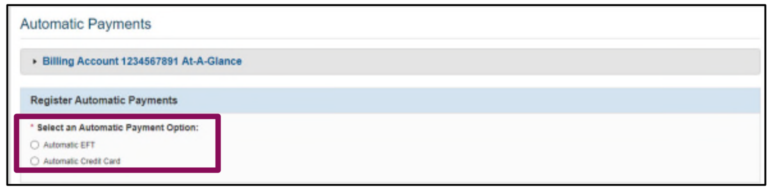
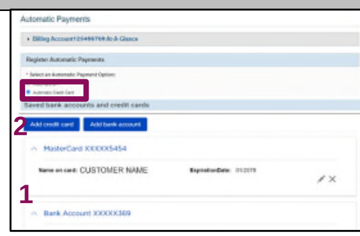
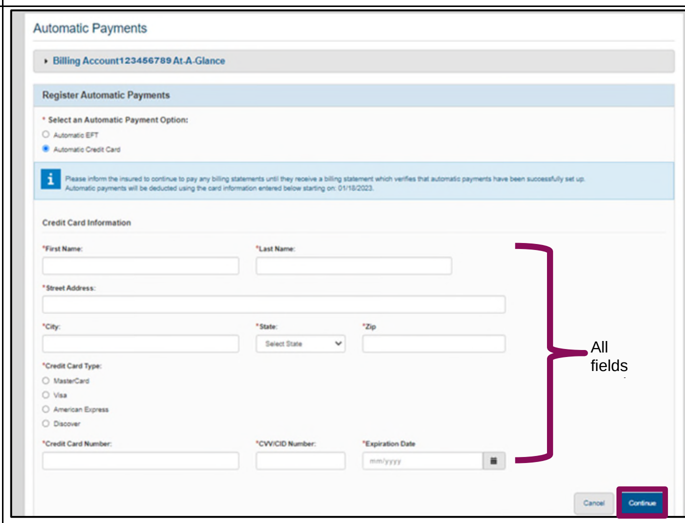
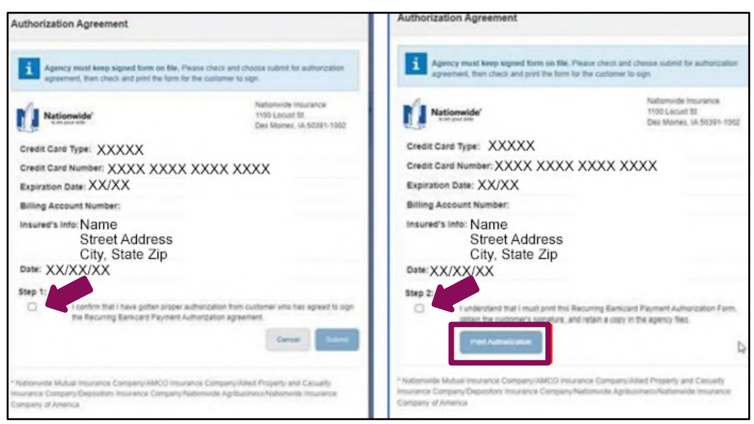
## Set up Automatic Payments

| Action | Screen |
|---|---|
| This screen displays when selecting "update" in "Automatic Payments". "Select an Automatic Payment Option" (either "Automatic EFT" or "Automatic Credit Card").<br><br>**Note:** This only applies to requests to change the payment information while keeping the pay method the same. If request is to change pay plan (i.e. from REFT to RBC or RBC to REFT) follow **Remove** steps listed below to change to direct billed, then follow **Add** steps above for new pay method. |  |

## Set up Automatic Credit Card Payments
## Steps 1-4

| Action | Screen |
|---|---|
| 1. If "Automatic Credit Card" is chosen, a table with saved credit cards will appear in the Credit Card Information field (if applicable).<br>2. To add a credit card, select "Add credit card". |  |
| 3. Enter the Credit Card information. All fields are required. Select "Continue". |  |
| 4. Once the credit card information is set up or updated, an "Authorization Agreement" modal displays. After reading the Authorization Agreement carefully, be sure to check the boxes for both Steps 1 & 2 and complete the authorization form. Select "Print Authorization". |  |

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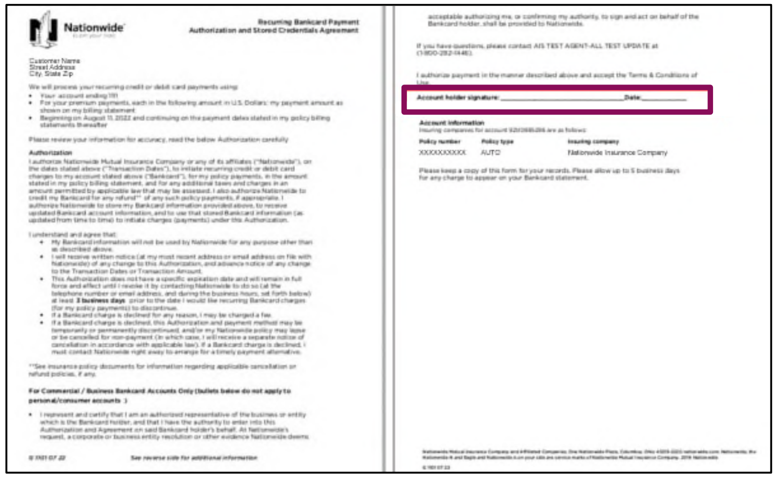
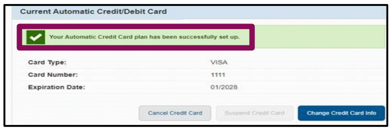
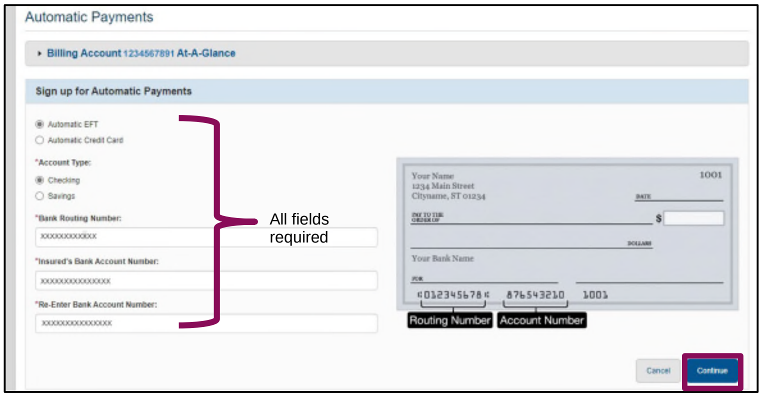
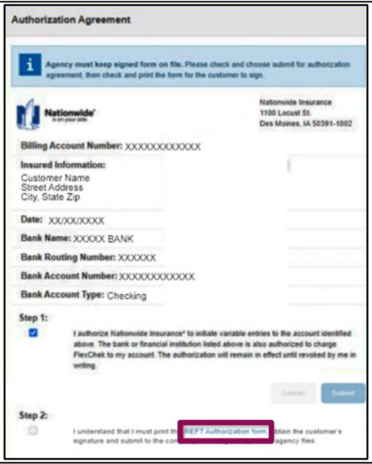
## Set up Automatic Credit Card Payments (cont'd)
### Steps 5-6

| Action | Screen |
|---|---|
| 5. The ACH form will open in a new browser. Download and have the customer sign. Retain a copy in the agency office. |  |
| 6. A confirmation box appears confirming that the Automatic Credit Card plan has been successfully set up. |  |

## Set up Automatic EFT Payments
### Steps 1-2

| Action | Screen |
|---|---|
| 1. Enter the required information on the screen then select "Continue" to proceed with the set up. |  |
| 2. An "Authorization Agreement" modal displays with a two-step process to authorize the payments and generate the new form.<br>• <u>Step 1</u>: Select the first checkbox and submit the acknowledgement that the insured has consented to the payments and any associated fees. If any of the information is incorrect, or you wish to cancel the process, choose "Cancel" to return to the Recurring EFT screen.<br>• <u>Step 2</u>: Select the second checkbox to activate the REFT Authorization form link to open it. |  |

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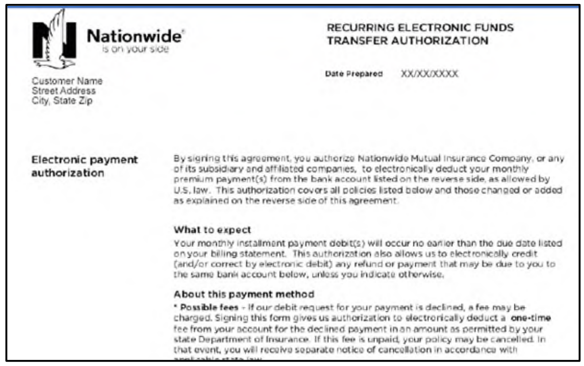
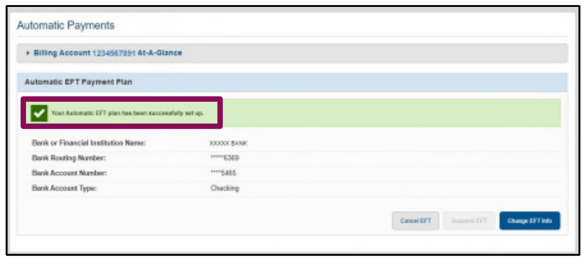
## Set up Automatic EFT Payments (cont'd)

### Steps 3-4

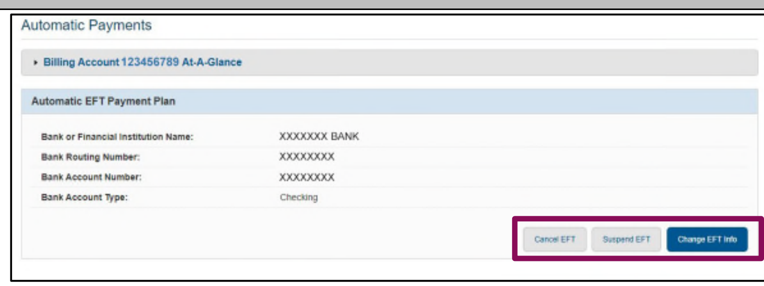
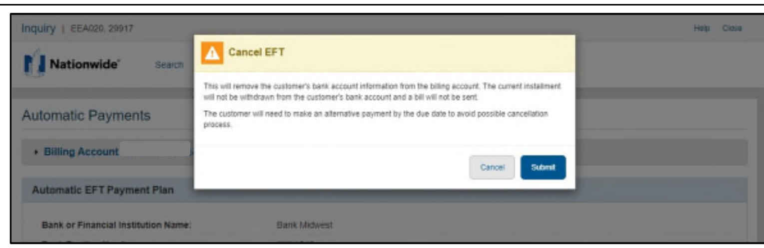
| Action | Screen |
|---|---|
| 3. The PDF authorization form will prefill with account and policy information. Obtain the customer's signature and submit the form to the company. Retain a copy of the form in your agency files. |  |
| 4. A confirmation message displays. |  |





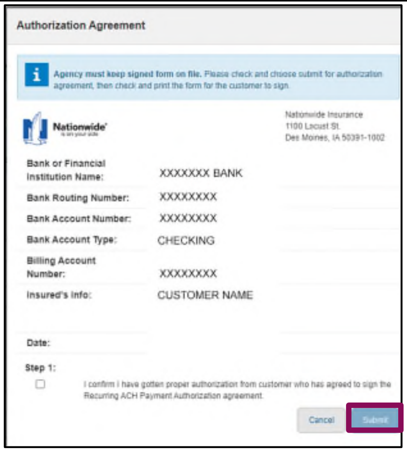
## Update Automatic EFT Payments – Cancel and Change EFT Info

### Steps 1-2

| Action | Screen |
|---|---|
| 1. When you select "Automatic EFT" (from the Automatic Payments screen), there are 3 different updates that can be made: "Cancel EFT", "Change EFT Info" or "Suspend EFT". |  |
| **Cancel EFT**<br>2. a. The Cancel Recurring EFT button may not be available due to the account being in warning status, or if the current month's draft has been sent to the banking institution. Selecting the "Cancel EFT" button displays this verification message. Select "Submit" to continue. |  |
| **Change EFT Info**<br>2. b. The "Register Automatic Payments" page displays the insured's existing information, including current routing and account numbers. Change the routing number, account number and/or account type if necessary. You must also re-key the bank account number for accuracy. When finished, select "Continue". |  |

## Update Automatic EFT Payments – Cancel and Change EFT Info (cont'd)

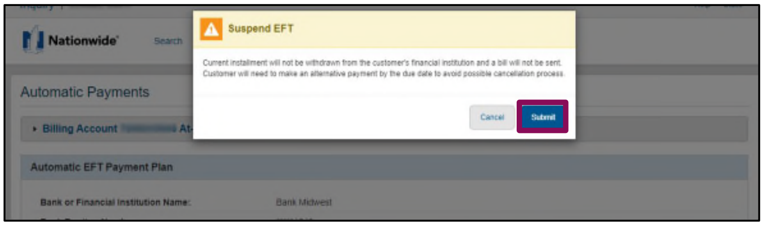
### Step 3

| Action | Screen |
|---|---|
| 3. An "Authorization Agreement" modal displays with a two-step process to authorize the payments and generate the new form. Select "Submit" to submit the authorization agreement. |  |



## Update Automatic EFT Payments – Suspend EFT

### Steps 1-2

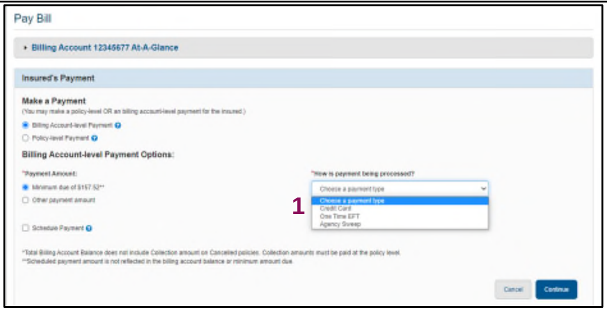
| Action | Screen |
|---|---|
| <u>**Suspend EFT**</u><br>1. The "Suspend EFT" button will not be active if the draft cannot be suspended. That draft may have already been initiated to the banking institution. This occurs two (2) business days before the billing due date.<br>2. Do NOT suspend a draft if the customer needs to make changes to their banking information as this may create future billing concerns. Banking information can be updated, without suspending the draft, right before the draft is initiated. Selecting the Suspend button displays the verification message below. Select "Submit" to continue. |  |



## Manage Pay Methods

### Add Saved Payment Method During Bill Pay

### Step 1

| Action | Screen |
|---|---|
| 1. On the Make a Payment screen, select payment type from the "How is payment being processed?" dropdown, either Credit Card or One Time EFT |  |



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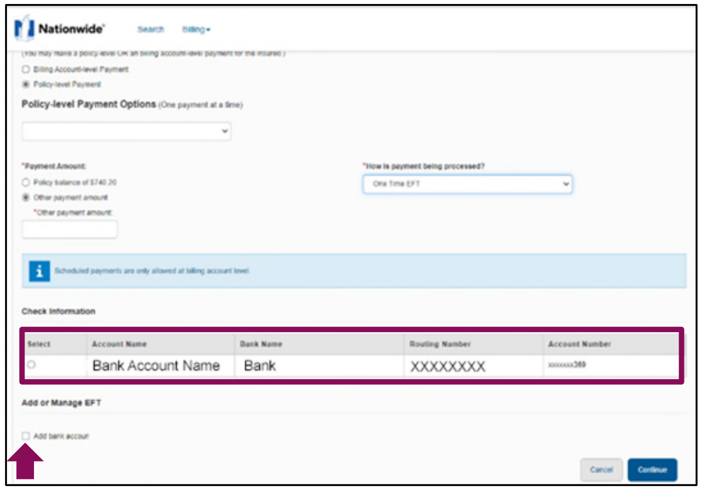
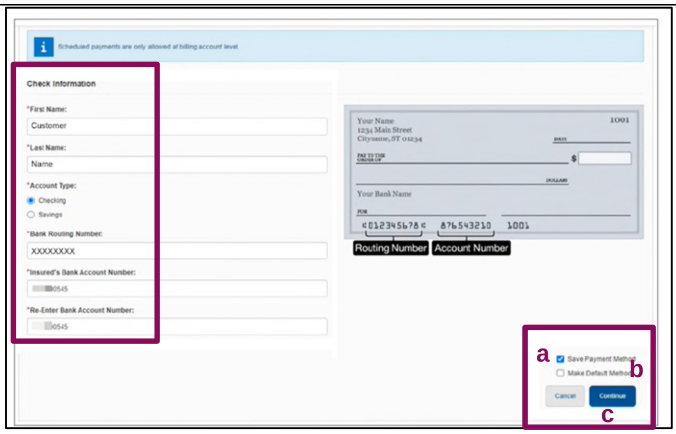
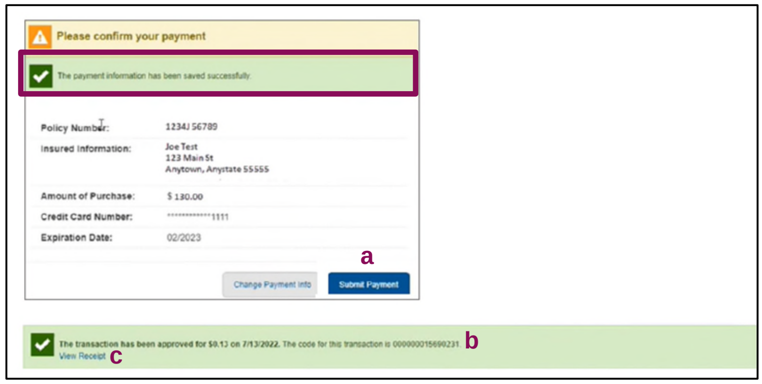
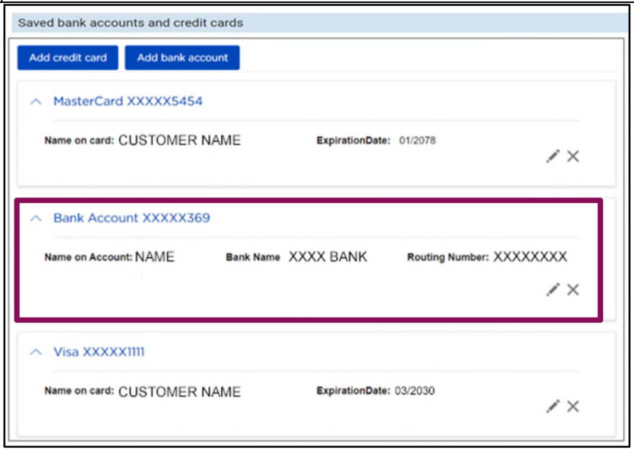
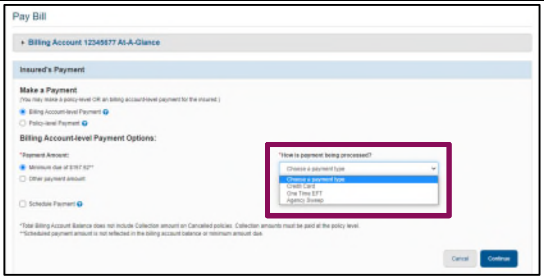
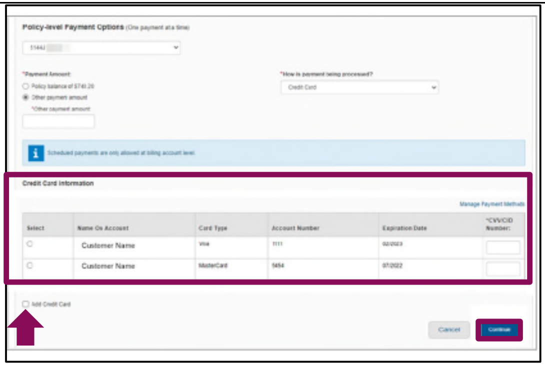
## Add Saved Payment Method During Bill Pay (cont'd)
## Steps 2-6

| Action | Screen |
|---|---|
| 2. To pay the bill, select the payment method on file. Once you choose a payment type, any existing saved payment method will appear in the table. **(This example is for EFT**.)<br><br>3. To add a new payment method, select the box next to "Add bank account" and select "Continue". |  |
| 4. In the "Check Information" enter the appropriate information in the required fields.<br>a. Select "Save Payment Method".<br>b. If this account should be designated as the default payment method, select "Make Default Method".<br>c. Select "Continue". |  |
| 5. The Authorization Agreement appears. For authorization, check Step 1 and Step 2. Select "Print Authorization". |  |
| 6. The ACH form will open in a new browser. Download and have the customer sign. Retain a copy in the agency office. |  |

## Add Saved Payment Method During Bill Pay (cont'd)
### Steps 7-8

| Action | Screen |
|---|---|
| 7. A box appears confirming that the payment method has been saved successfully.<br>a. Select "Submit Payment" to pay the bill.<br>b. A confirmation box appears to confirm that the payment has been received.<br>c. To view the receipt, select the "View Receipt" link. |  |
| 8. The account that was just added now appears on the "Saved bank accounts and credit cards" page. |  |

## Retrieve and Choose Existing Saved Payment Method
### Steps 1-2

| Action | Screen |
|---|---|
| 1. On the Make a Payment screen, select payment type from the "How is payment being processed?" dropdown, either Credit Card or One Time EFT |  |
| 2. Once you choose a payment type, any existing saved payment method will appear in the table. (**This example is for credit card.**)<br><br>To pay the bill, select the payment method on file. For credit card, you will need to enter the CVV on file. Select "Continue".<br><br>To add a new payment method, select the box next to "Add Credit Card" and select "Continue". |  |

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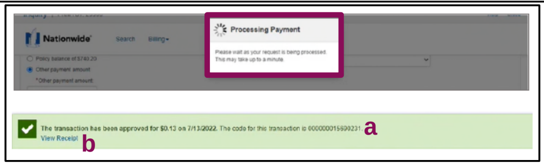
## Retrieve and Choose Existing Saved Payment Method

### Step 3

| Action | Screen |
|---|---|
| 3. A “Processing Payment” box appears.<br>a. Once payment is complete, a transaction approved message appears.<br>b. You can view the receipt. |  |



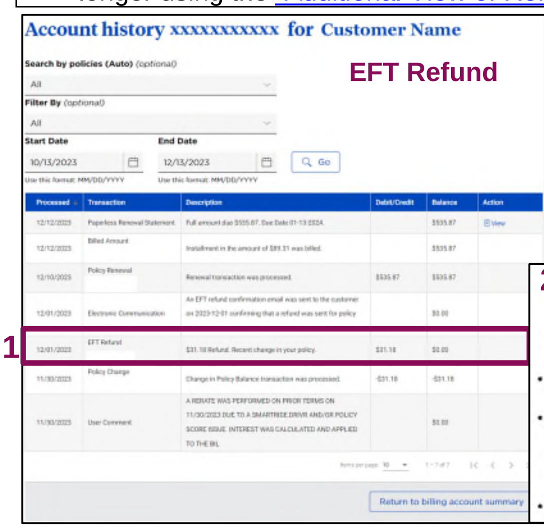
## Refunds (EFT, Bankcard, Chase, Check)

**Note:** Credit is viewable in Agent Center Billing Account History on the date it generates. It takes 2-3 business days for cancellation refunds to generate. On active policies, refunds will generate every Sunday.

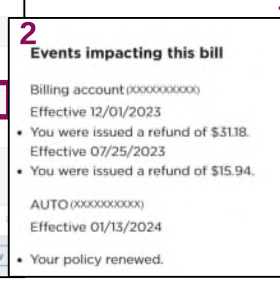
| Refund Type | Refund Process | Refund Timeline |
|---|---|---|
| **Bankcard** | If last payment was made with a bankcard and the refund is < the last payment amount, refund will go back to that bankcard. | Once generated, client receives refund in 3-5 business days (11-12 business days for new business down payment. |
| **EFT Refund** | If client is enrolled in Recurring EFT prior to refund issuing, the money will return to the insured's bank account on file. | Once generated, client will receive refund in 1-3 business days (11-12 business days for New Business Down Payment). |
| **Chase Refund** | If client’s refund method is Check and they have a valid email address on file, a credit is set up through JP Morgan Chase. Client will receive an email with instructions to create a profile to claim the refund. (Excludes: REFT Billed Accounts, New Business Down Payment and if the most recent payment was made with Bankcard). | • Client has 7 calendar days to accept digital deposit. Once client accepts the Chase refund, they will receive refund in 1-2 business days.<br>• If no action is taken within those 7 calendar days, the refund will be mailed to the client. (See Check Refund Timeline).<br>• Client’s **do not** have to have a Chase bank account to be eligible for this refund method. |
| **Check Refund** | If client’s refund method is Check and they do not have a valid email address on file, the refund will be issued as a paper check. | Client will receive refund in the mail within 9-23 calendar days. If you have questions about the check, you may contact the Service Center. |

## Refunds Screenshots (EFT, Bankcard, Check)

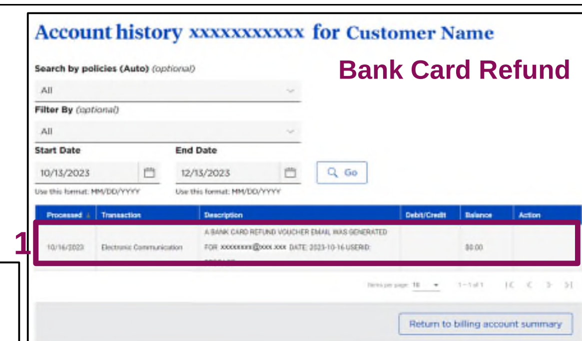
1. In Agent Center’s “Billing Account History”, refund information displays for 90 days, but you can go back longer using the search filters.
2. In “View Premium Details”, refund information is available for 30 days, but you can view refund status going back longer using the “Additional View of Refund Status”.



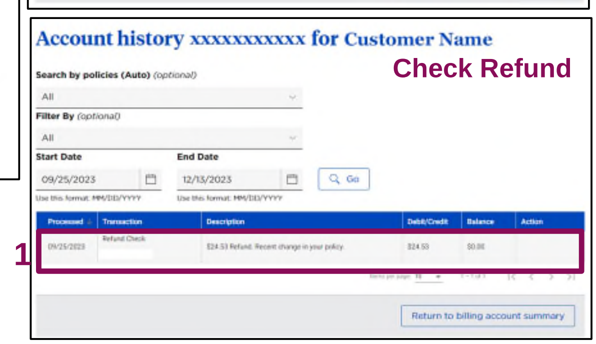














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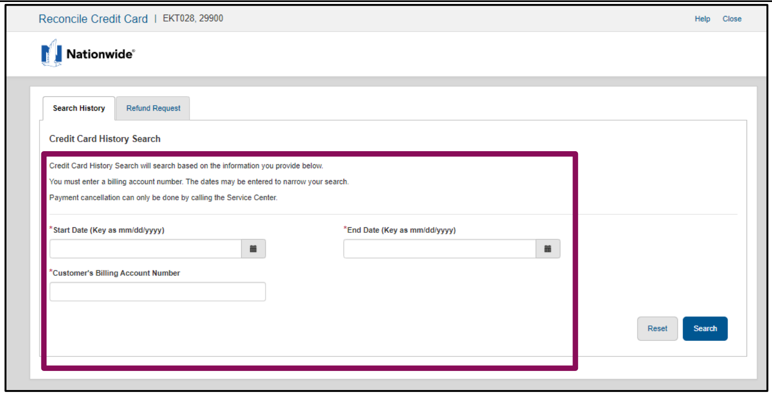
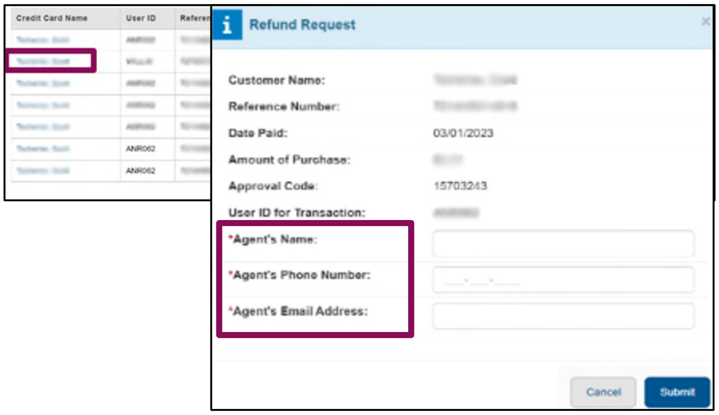
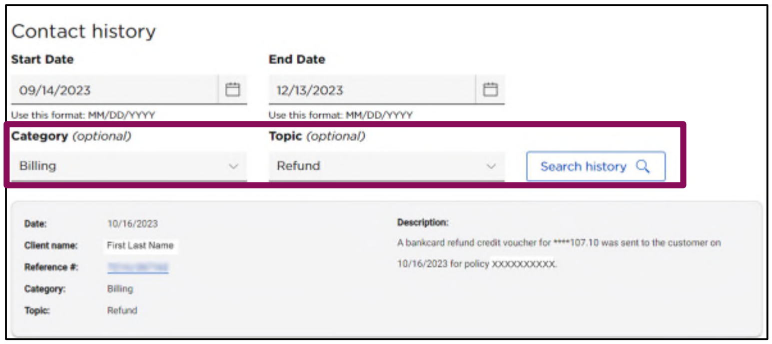
## Credit Card Refunds
### Steps 1-3

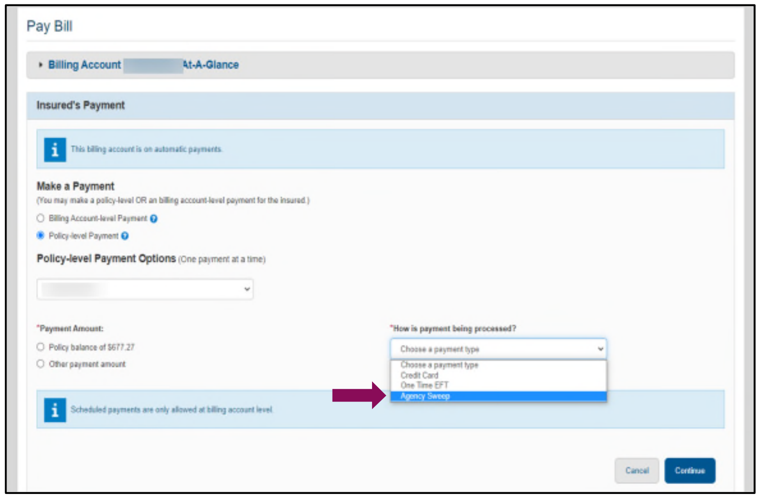
| Action | Screen |
|---|---|
| 1. To submit a credit card refund request, under the “Billing & Claims” tab in Agent Center, select “Reconcile credit card” and enter the required information. |  |
| 2. Select the credit card name to submit a credit card refund request. Complete the information with an asterisk* and select “Submit”. |  |
| 3. A success message appears indicating your request for a refund was submitted. |  |

## Additional View of Refund Status

| Action | Screen |
|---|---|
| An additional way to view a refund status is under Contact History. Simply select “Billing” as the category and “Refund” as the topic and search. The results will display based on the dates you enter. |  |

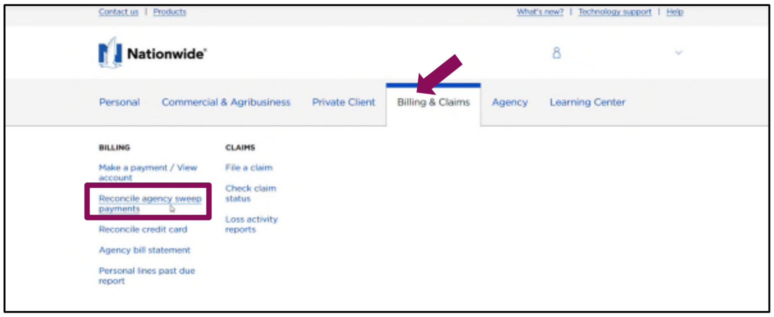
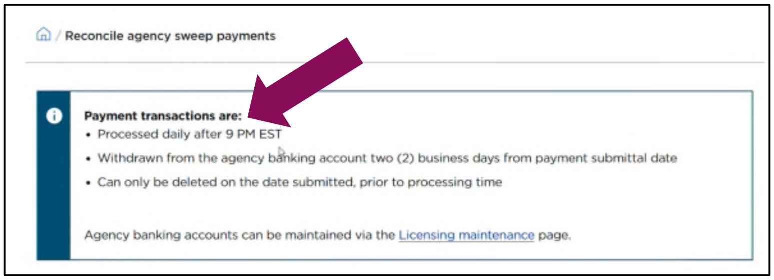
# Reconciliation

## Agency Sweep Account

| Action | Screen |
|---|---|
| When you accept a customer's cash, check, or a Money Order payment, the expectation is that the payment will be deposited into the bank account Nationwide has on file as your "Sweep Account".<br><br>**Day 1** Payment is recorded in Agent Center Billing<br>**Day 3** Account sweep occurs<br><br><u>Payment transactions</u>:<br>1. Are processed daily after 9 pm ET.<br>2. Are withdrawn from agency banking account two business days from payment submittal date.<br>3. Can only be deleted on the date submitted, prior to processing time. |  |

## Reconcile Your Agency Sweep Account

## Steps 1-4

| Action | Screen |
|---|---|
| 1. Access "Reconcile agency sweep payments" under the "Billing & Claims" Tab on Agent Center Workspace. |  |
| 2. An information box displays with important payment transaction details. |  |
| 3. Your primary agency number will populate in the "Agency number" section; however, you can input a different agency number if applicable.<br><br>4. Just as you see today, you have 3 tabs available to you: "All transactions", "NSF checks" or "Delete payments". |  |

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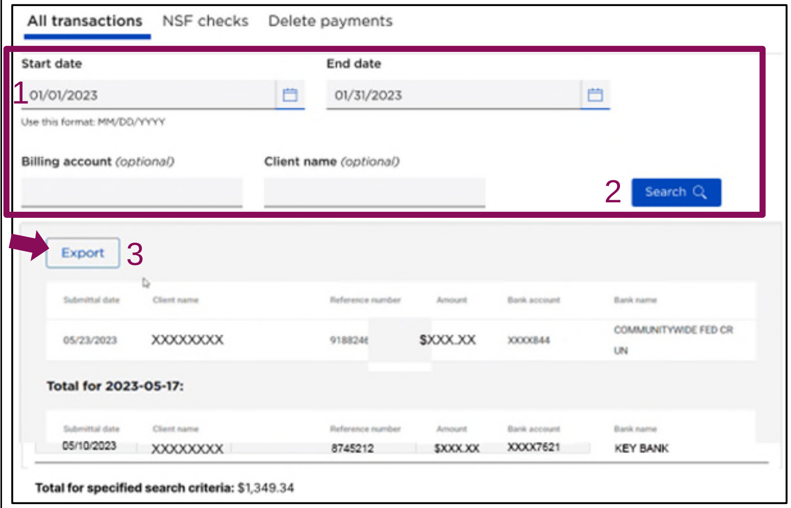
## All Transactions Tab

### Steps 1-3

**Action**

1. As you do today, enter your search criteria with “Start date” and “End date” as mandatory fields and “Billing account” and “Client name” as optional.
2. Select the “Search” button. Your search results display.
3. To print, you can export the results to an Excel spreadsheet by selecting the “Export” button and print.

**Screen**



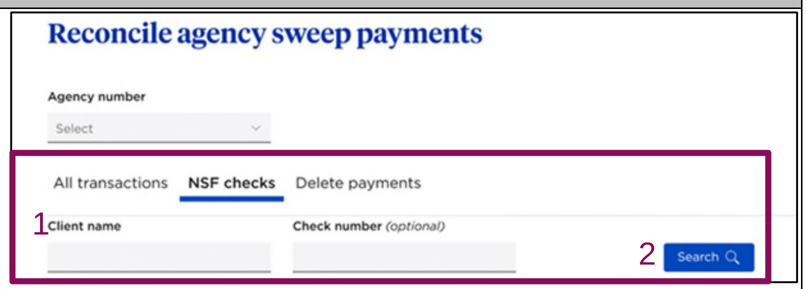

## NSF Checks Tab (Request Reimbursement)

### Steps 1-4

**Action**

1. You can search for the NSF check by client name (required) and check number (optional).
2. Select the “Search” button to display results.

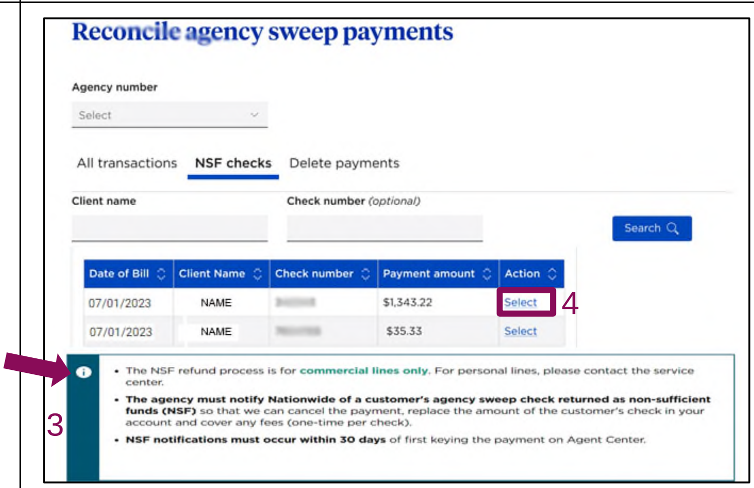
**Screen**




**Action**

3. Read the information box for important information.
4. Select the appropriate client under the “Action” column.

**Screen**



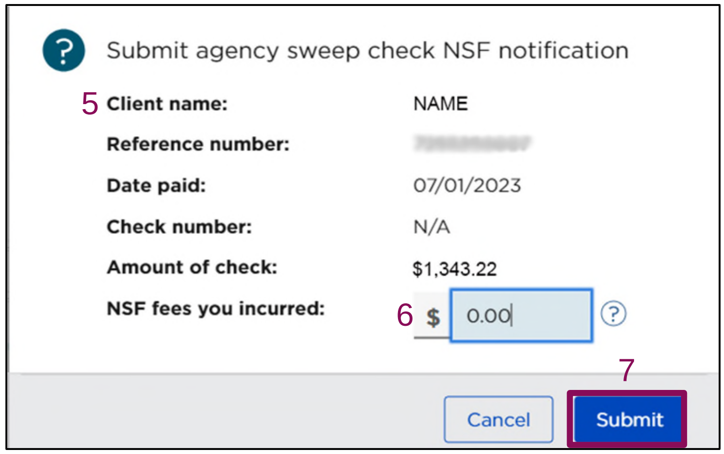
## NSF Checks Tab (Request Reimbursement) (cont'd)

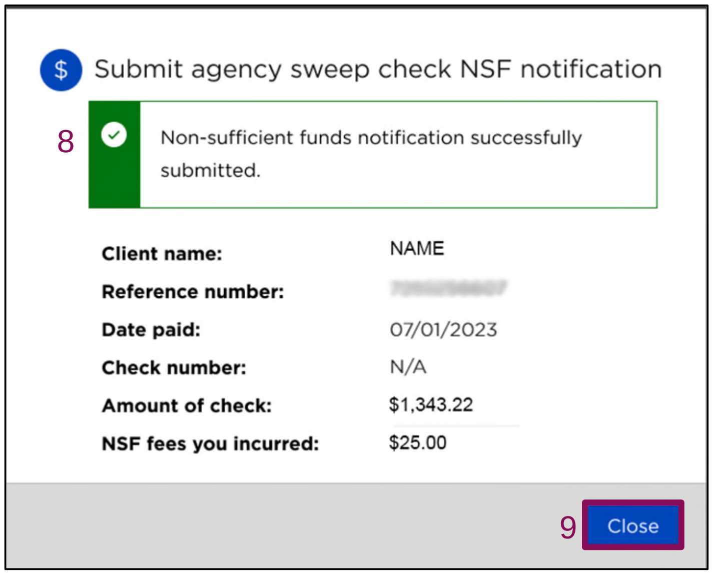
### Steps 5-9

**Action**

5. The selected client information displays.
6. Enter the amount of NSF fees you incurred from the returned check.
7. If everything looks good and you want to proceed, select the "Submit" button.
8. A success message displays.
9. Select the "Close" button when finished.

**Screen**




## Delete Payments Tab

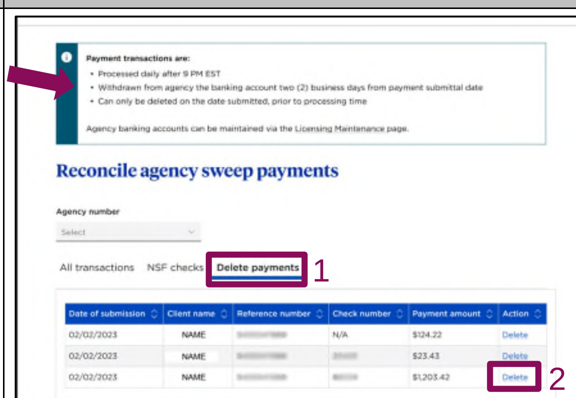
### Steps 1-2

**Action**

When daily reconciling your agency sweep account, you find that a payment was entered incorrectly. The information box indicates that a payment transaction can only be deleted on the date submitted, prior to processing time.

1. Select the "Delete payments" tab. The payments received today display.
2. Choose the appropriate client name by selecting "Delete" under the "Action" column.

**Screen**

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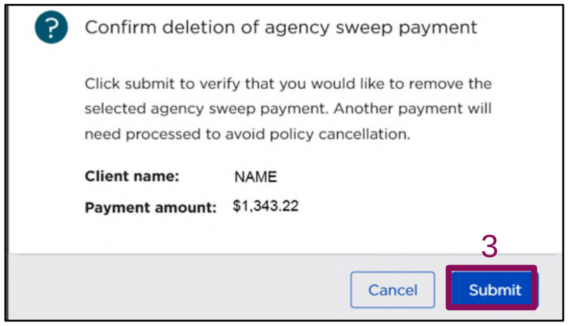
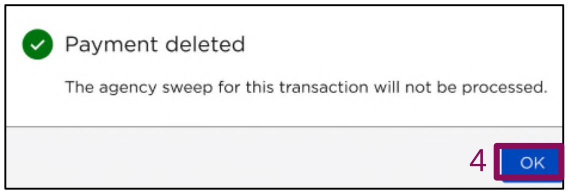
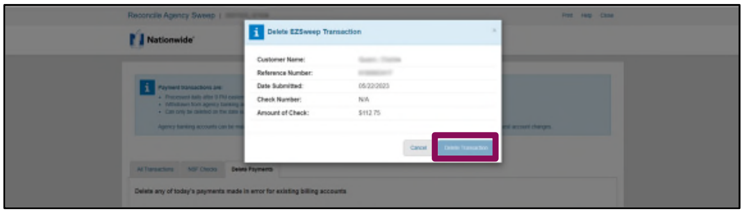
## Delete Payments Tab (cont'd)

### Steps 3-4

| Action | Screen |
|---|---|
| 3. A pop-up message displays asking you to confirm that you want to delete the selected agency sweep payment. Select "Confirm" to proceed.<br>4. A success message displays. Select the "OK" button when finished. |  |

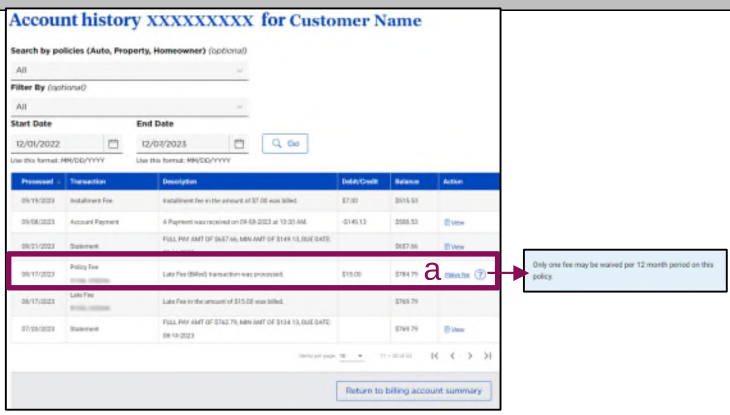
## Payment Taken/Entered in Error

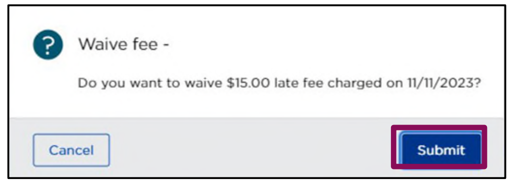
### Steps 1-2

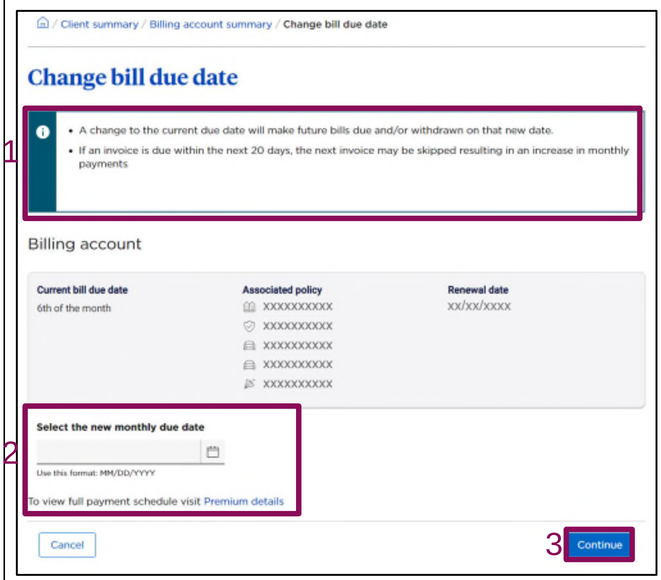
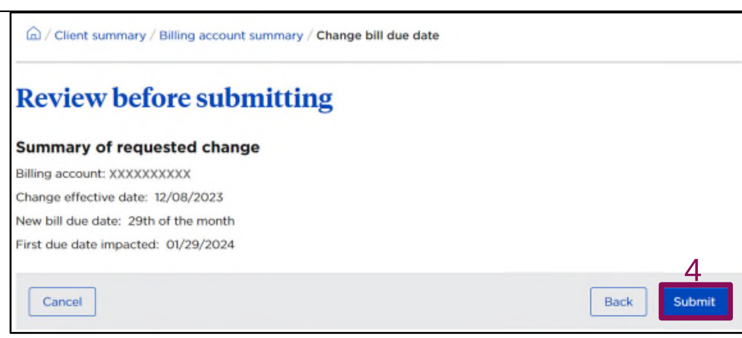
| Action | Screen |
|---|---|
| To correct a payment taken or entered in error by deleting the entry **prior to the daily cutoff of 9:00 pm ET**. If it's after this time, contact ITSD to escalate a ticket.<br>1. To delete the entry, select the appropriate link under the "Insured's Name" column. A "Delete EZSweep Transaction" popup displays. Select the "Delete Transaction" button.<br>2. Then go back to the billing account to re-enter it correctly in the make a payment function. |  |

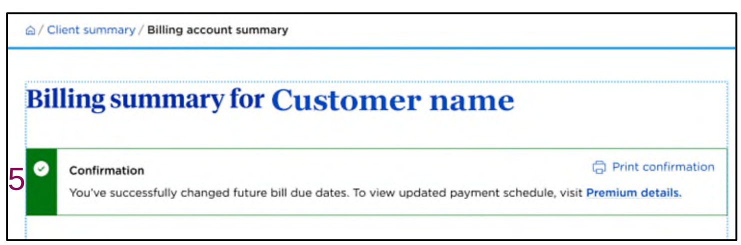
## Waive Late Fees

### Step 1

| Action | Screen |
|---|---|
| 1. As you view the Billing Account History, you may find a Late Fee entry. You can complete your own Late Fee overrides, when applicable, by selecting on the Late Fee hyperlink.<br>a. When you select the "?" a message box displays: "Only one fee may be waived per 12-month period on this policy." |  |

<table>
<tr><th colspan="2">Waive Late Fees (cont'd)<br>Step 2</th></tr>
<tr><th>Action</th><th>Screen</th></tr>
<tr><td>2. A pop-up message appears asking you to confirm that you want to waive the late fee charges. Select the "Submit" button to complete the transaction.</td><td>
</td></tr>
</table>

<table>
<tr><th colspan="2">Manage Billing Account<br>Change Due Date (Next Invoice Date)<br>Steps 1-5</th></tr>
<tr><th>Action</th><th>Screen</th></tr>
<tr><td>1. From the "Billing Account Summary," select the "Change date" link under "Next Invoice Date." The "Change bill due date" screen appears.Make sure to read the information box prior to choosing a new due date.<br>2. Select the new monthly due date. NOTE: You can also view the customer's full payment schedule by selecting the "Premium details" link on the screen.<br>3. Select "Continue"</td><td>
</td></tr>
<tr><td>4. Review the requested change. If the due date needs changed, select the "Back" button, make the corrections needed and select "Continue"again. If the date is correct, select the "Submit" button.<br>5. A "Confirmation" message displays.</td><td>


</td></tr>
</table>

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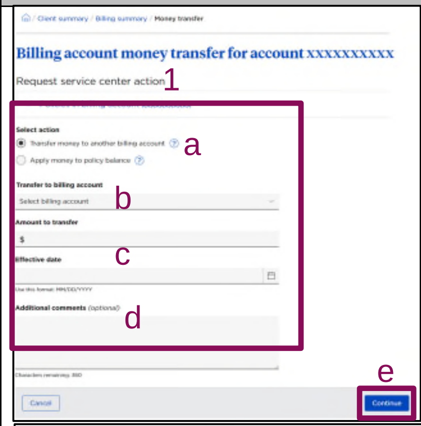
## Request Service Center Action

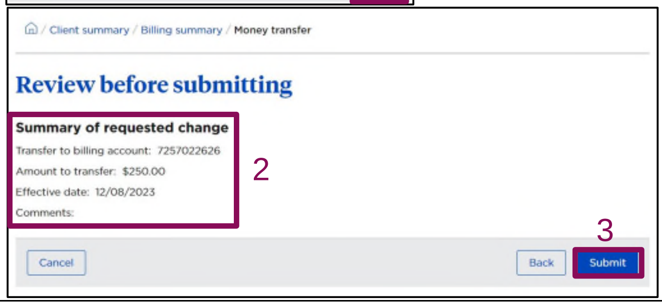
<table>
<tr><th>Action</th><th>Screen</th></tr>
<tr><td>

1. Use “Request Service Center Action” from “Billing Account Summary” if you need help to “**Transfer money to another billing account” OR “Apply money to policy balance”.**
   a. Select the correct radio button for the action needed under “Select action”.
   b. Select the billing account to transfer or apply money.
   c. Complete the dollar amount and effective date.
   d. Include “Additional Comments” as needed
   e. Select “Continue”.
2. Review the “Summary of requested change”. If you need to make changes, select the “Back” button.
3. If everything is correct select the “Submit” button.

Both options send an email to the PL Service Center for Processing to handle.

</td><td>



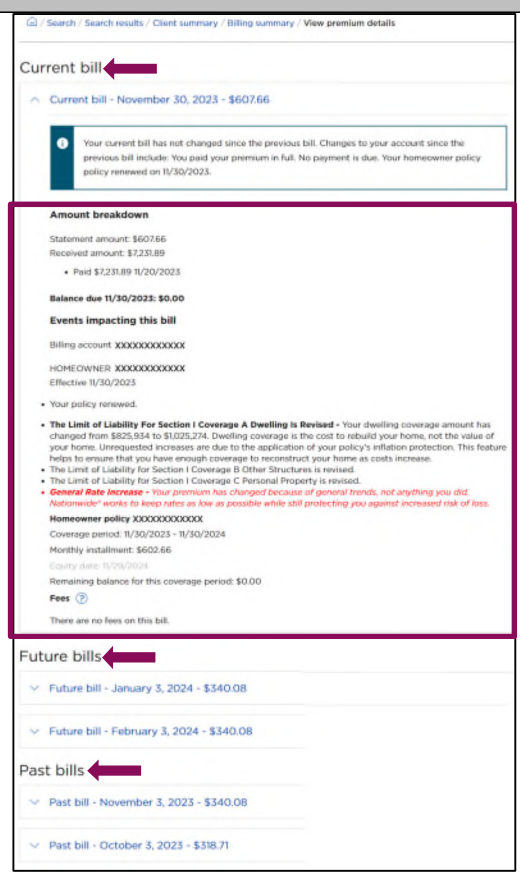

</td></tr>
</table>

## View Premium Details

<table>
<tr><th>Action</th><th>Screen</th></tr>
<tr><td>

This screen displays when you select “View Premiun Details”. You can view current, future and past bills. Premium change amount displays.

</td><td>




</td></tr>
</table>

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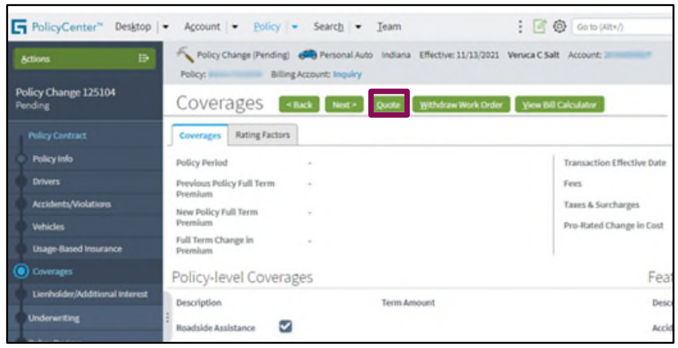
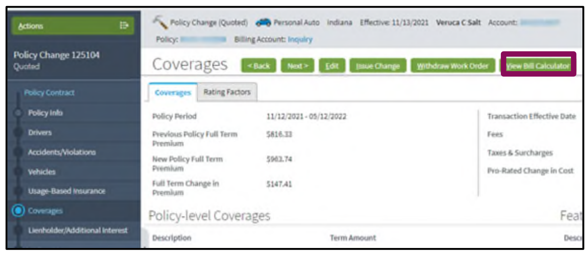
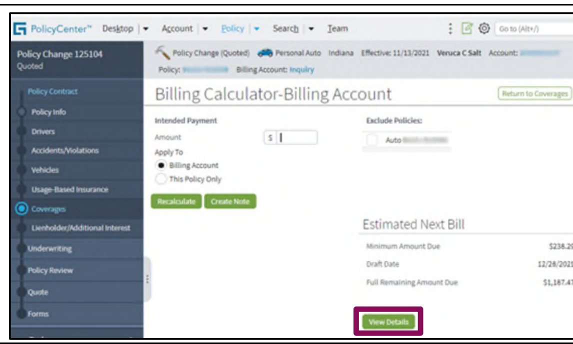
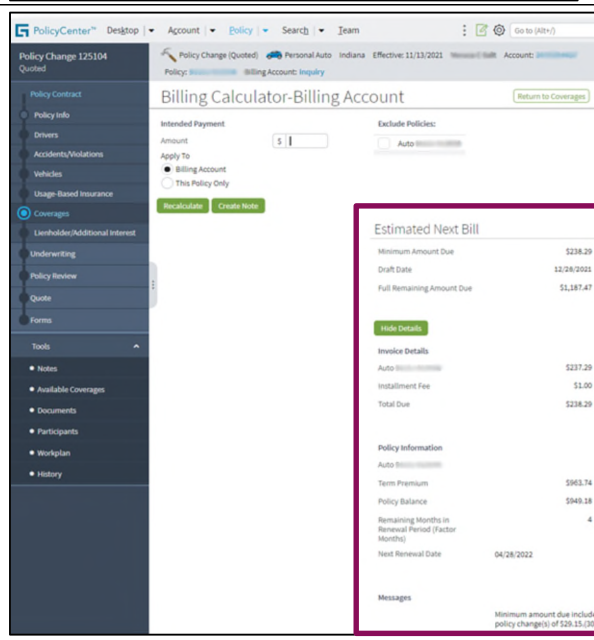
## Using the Billing Calculator

### Steps 1-4

| Action | Screen |
|---|---|
| The billing calculator is a centralized service receiving billing and payment information. This calculator allows you to determine installment payments based on changes on the policy.<br><br>Billing Calculator is only available for policy change, rewrite, and renewal unbound/pending policy transactions. It is not available for new submissions or bound changes/renewals.<br><br>1. After completing all changes on the policy, select the “Quote” button. |  |
| 2. When the policy is in “Quoted” status, select the “View Bill Calculator” button. |  |
| 3. On the “Billing Calculator-Billing Account” screen, select the “View Details” button. |  |
| 4. The “Estimated Next Bill” which includes “Invoice Details” and “Policy Information” displays for your review on the “Billing Calculator-Billing Account” screen. |  |

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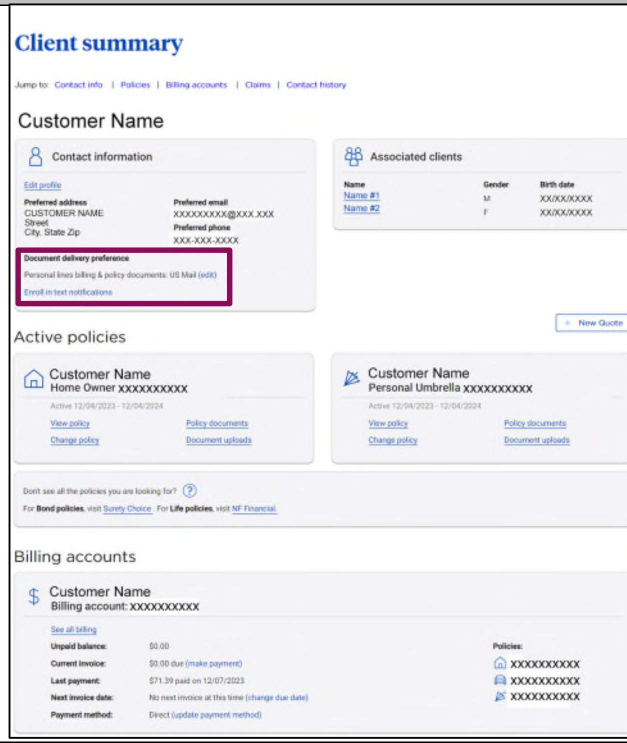
## View Statements

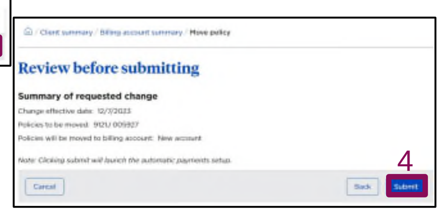
| Action | Screen |
|---|---|
| PL Billing statements and policy document preferences will be accessed from the Client Summary in the “Contact Information” tile. |  |



## Service Clients

## Move Policy

## Steps 1-4

| Action | Screen |
|---|---|
| The “Move Policy” Option provides the ability to move an existing policy to another existing account or to create a new account with that existing policy. This change is done in real time and effective immediately. Historical information for the policy will move to the new account.<br>1. Select the policy or policies to move.<br>2. Select the “Create new billing account” radio button and then provide the account holder’s information.<br>3. Select the “Continue” button.<br>4. Review the requested change. If change is incorrect, select “Back” to make the change. If correct, select the “Submit” button.<br><br>NOTE: If only one policy exists on the account, moving to a new account will automatically close the existing account. Move changes are dependent on the status of the account, so cancelled policies can’t be moved to a new account. Policies in Hold Status, for whatever reason, can’t be moved. Third party billing accounts also can’t be moved. |   |





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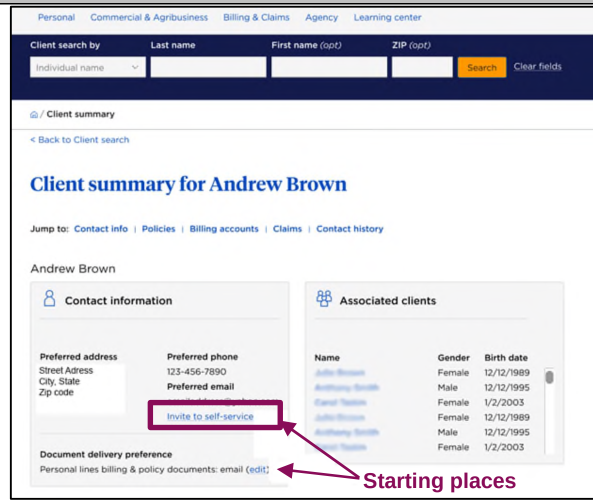
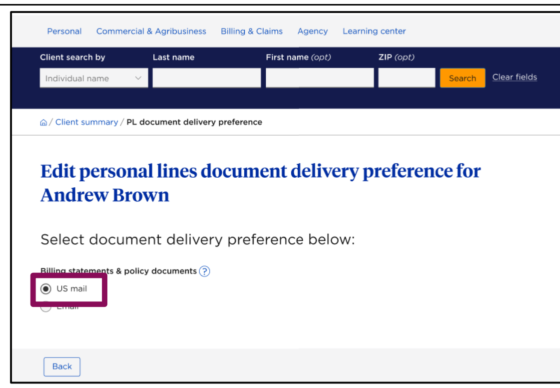
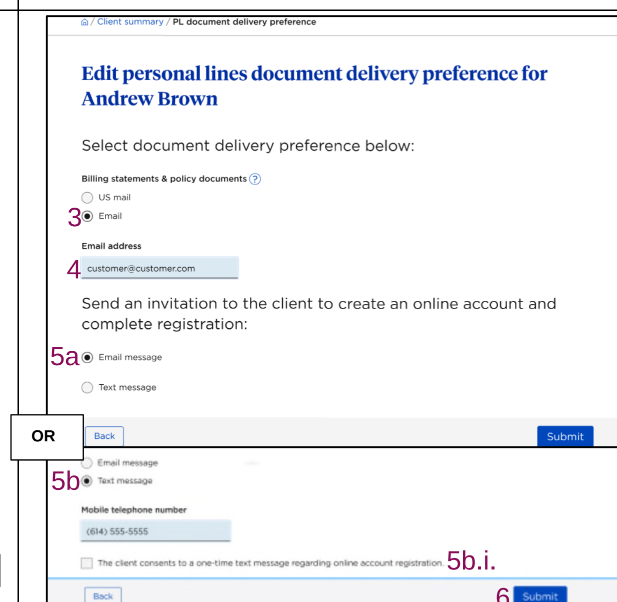
## Paperless Registration
### New Paperless Registration Not Registered on nationwide.com
### Steps 1-7

| Action | Screen |
|---|---|
| 1. From Client summary, Contact information tile, there are two possible starting places. Since the customer does not have an existing nationwide.com account, select the “Invite to self-service” link. |  |
| 2. Because the customer does not have an online account, the delivery preference of “US mail” displays. |  |
| 3. Select the document delivery preference as “Email”.<br>4. If there is an email on file, it will populate; if not, enter the customer’s email address.<br>5. If the customer wants the invitation to register and create an account sent via:<br>a. <u>Email</u> – Select the “Email message” button; OR<br>b. <u>Text message</u> – Select the “Text message” button, if there is a phone number on file, it will populate; if not, enter the mobile telephone number.<br>i. You must check the box indicating that the customer consents to a one-time text message. If the box isn’t checked, you will receive this message:<br>Please confirm client consent.<br>6. Select “Submit”. |  |
| 7. A confirmation message displays on the client summary screen. |  |

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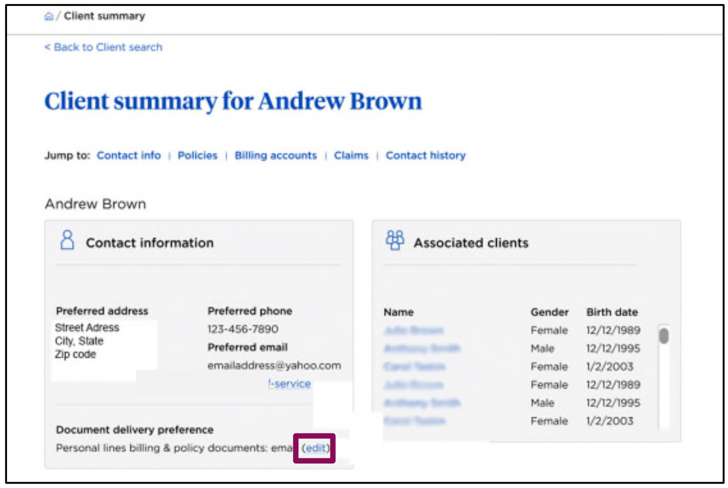
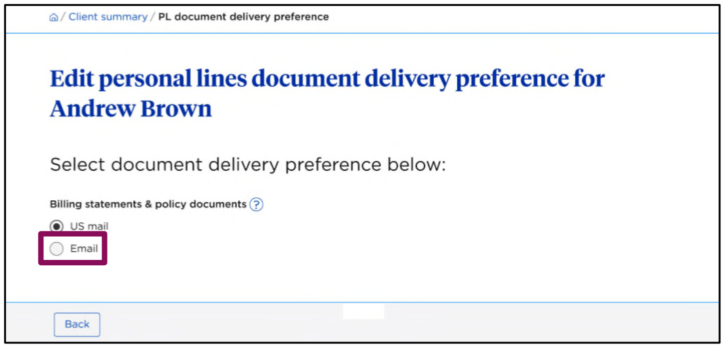
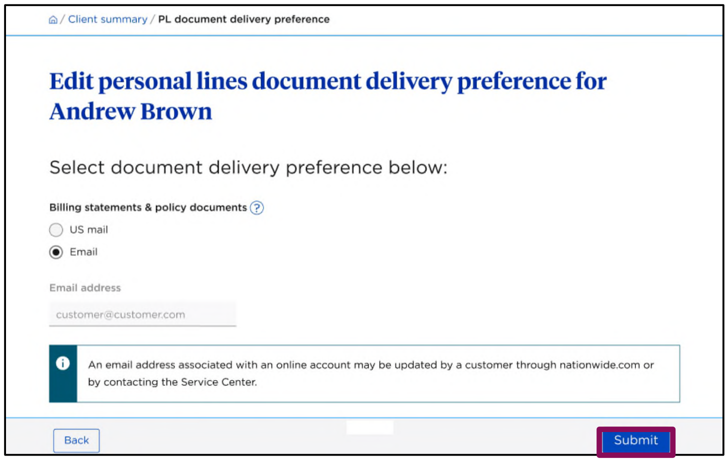
## New Paperless Registration – Already Registered, Not Signed up for Paperless

### Steps 1-4

<table>
<tr><th>Action</th><th>Screen</th></tr>
<tr><td>1. From Client summary, Contact information tile, select the “edit” link under “Document delivery preferences”.</td><td>
</td></tr>
<tr><td>2. The current preference displays. To change the document delivery preference, select the “Email” button.</td><td>
</td></tr>
<tr><td>3. The email address is not editable on this screen. Select “Submit”.</td><td>
</td></tr>
<tr><td>4. A confirmation message displays.</td><td>
</td></tr>
</table>

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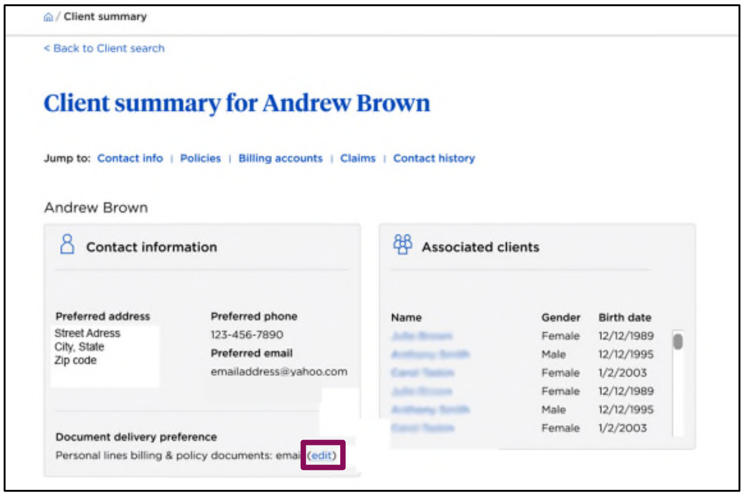
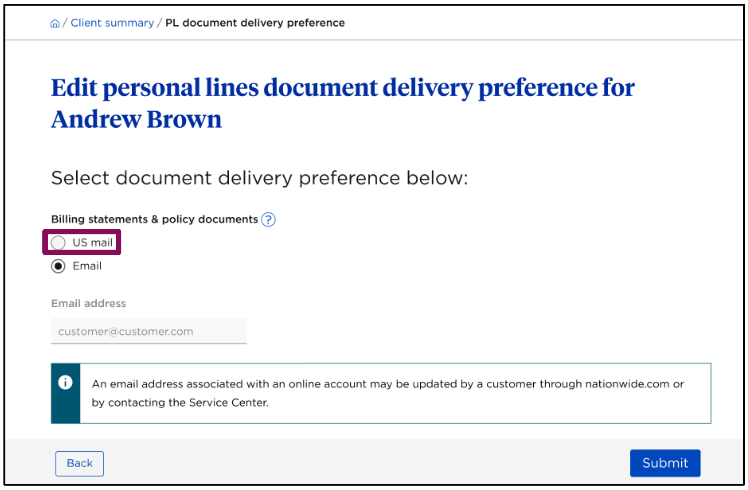
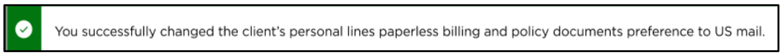
<table>
<tr><th colspan="2">View/Update Existing Paperless Registration</th></tr>
<tr><th colspan="2">Steps 1-4</th></tr>
<tr><th>Action</th><th>Screen</th></tr>
<tr><td>1. From Client summary, Contact information tile, select the “edit” link under “Document delivery preferences”.</td><td>
</td></tr>
<tr><td>2. The current preference displays. The email address is not editable on this screen. To change the document delivery preference, select the “US mail” button.</td><td>
</td></tr>
<tr><td>3. Select “Submit”.</td><td>
</td></tr>
<tr><td>4. A confirmation message displays.</td><td>
</td></tr>
</table>

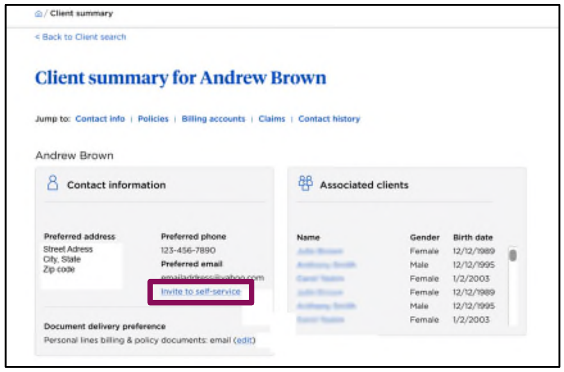
## Online Registration Invitation

### Steps 1-7

<table>
<tr><th>Action</th><th>Screen</th></tr>
<tr><td>

1. From Client summary, Contact information tile, select the “Invite to self-service” link.

</td><td>

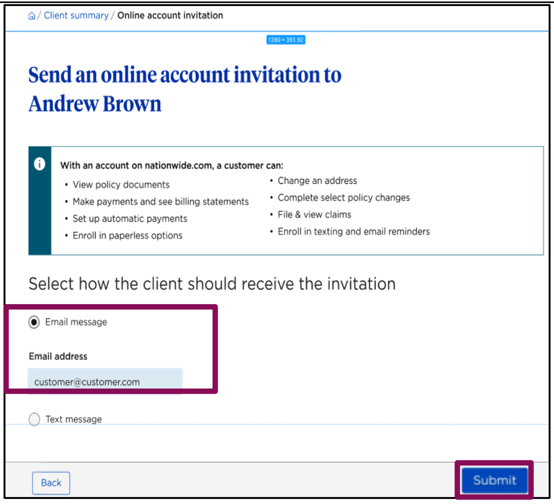



</td></tr>
<tr><td>

<u>Email Invitation</u>

2. Select the “Email message” button for the customer to receive the invitation via email. If there is an email on file, it will populate; if not, enter the customer’s email address.
3. Select “Submit”.

</td><td>

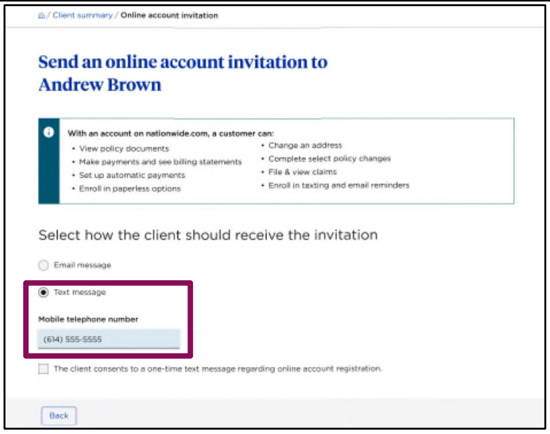



</td></tr>
<tr><td>

<u>Text Invitation</u>

4. Select the “Text message” button for the customer to receive the invitation via text. If there is a phone number on file, it will populate; if not, enter the customer’s phone number.

</td><td>




</td></tr>
<tr><td>

5. You must check the box indicating that the customer consents to a one-time text message. If the box isn’t checked, an error message displays.
6. Select “Submit”.

</td><td>


</td></tr>
<tr><td>

7. A confirmation message displays.

</td><td>


</td></tr>
</table>

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## Update Insured Information

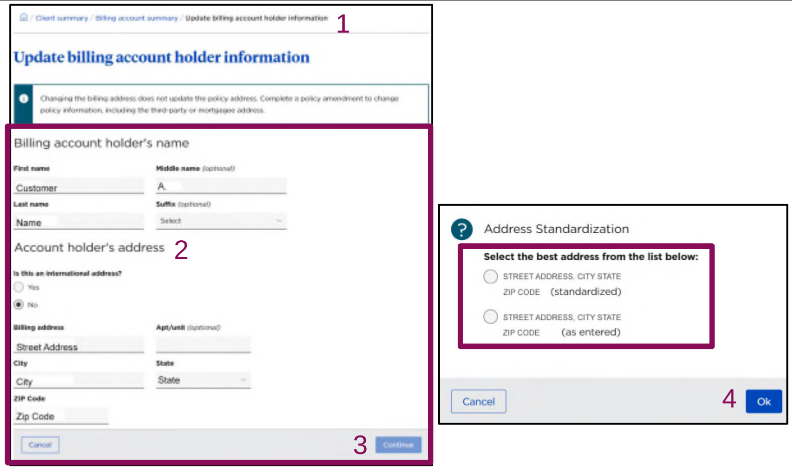
### Steps 1-4

**Action**

1. From “Billing Account Summary”, select the “Update” link in the “Insured Information Update” section.
2. Make changes to the billing account holder information.
3. Select “Continue”.
4. Address standardization may be required to confirm the change of address. Select the best address from the list and select “OK”. If no standardization is required, the change is submitted and a success message displays.

**NOTE:** Changing the billing address does not update the policy address. Complete a policy amendment to change policy information, including third party or mortgagee addresses.

**Screen**




## Warnings & Notices

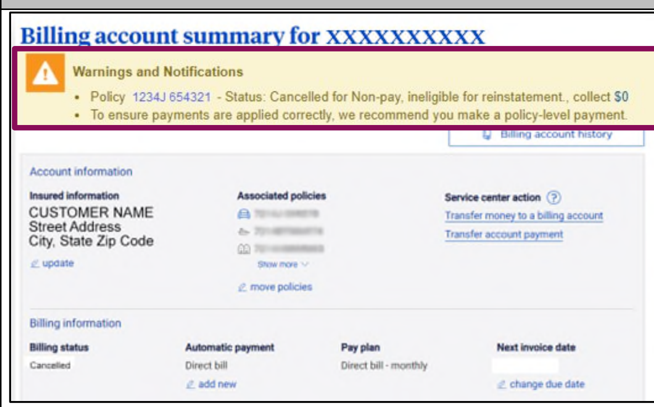
### Steps 1- 3

**Action**

1. Here is the message you will see when the policy is cancelled for non-pay. You will also be alerted if there is a balance due and how to correctly apply the outstanding balance. Notice it states it is ineligible for reinstatement, so the outstanding balance would be collected but the policy remains cancelled.

2. You can see reinstatement information on this screen as well.

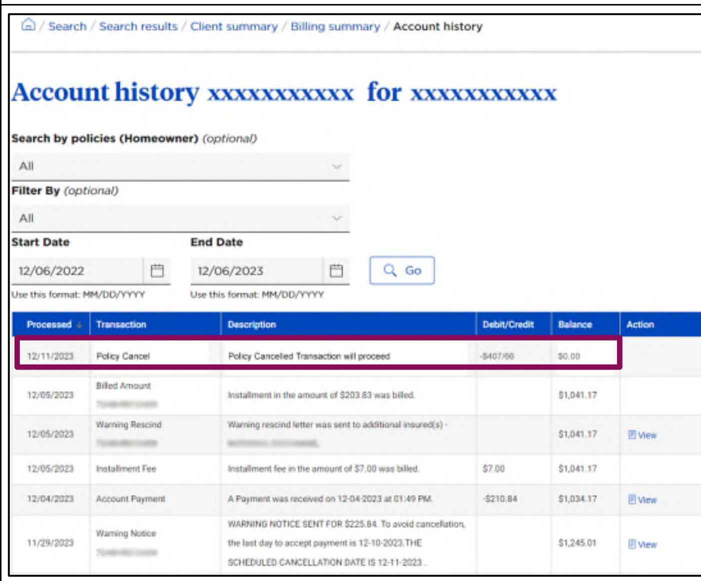
**Screen**




**Action**

3. After a period of time the warnings and notices will deactivate, but you will still see details in the “Billing Account History”.

**Screen**

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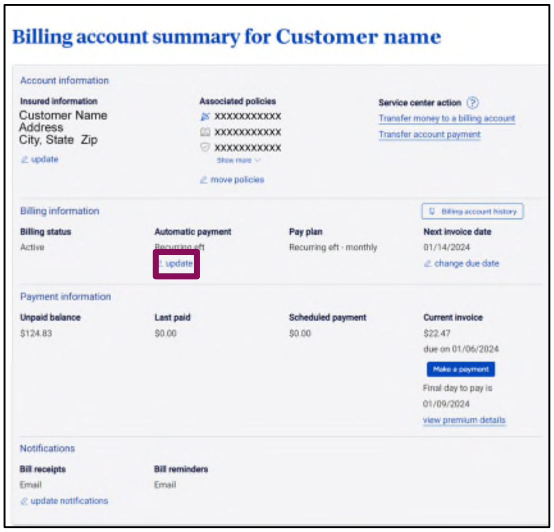
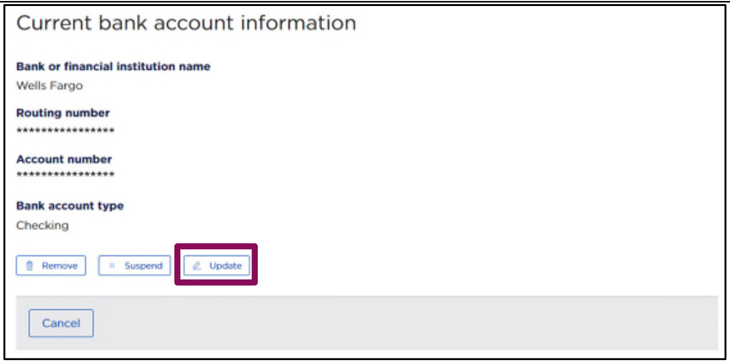
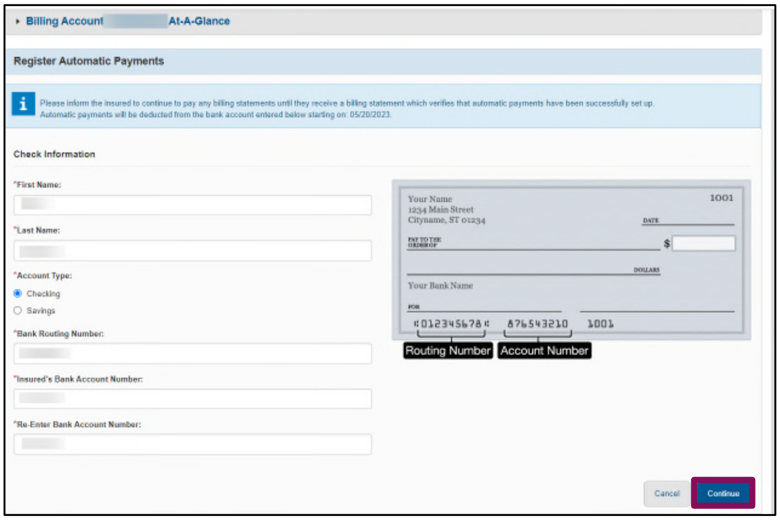
# Reprint Important Documents
## Reprint EFT Authorization Form
### Steps 1- 3

| Action | Screen |
|---|---|
| Here is a workaround to reprint an EFT Authorization Form.<br><br>1. Select the “update” link in Automatic Payments on the Billing Account Summary screen. |  |
| 2. This is a workaround, so you won’t be making an official change; but you can retrieve the RBC Authorization Form needed by selecting the “Update” button. |  |
| 3. Select “Continue” to get the authorization form. |  |

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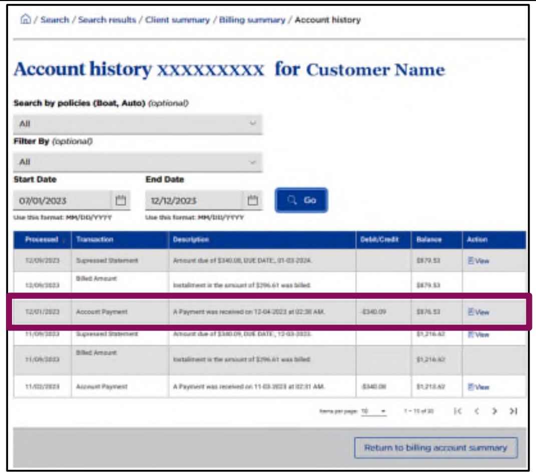
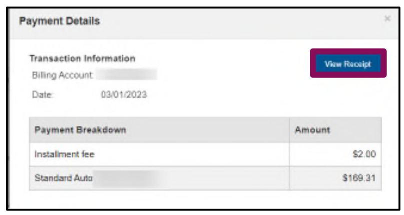
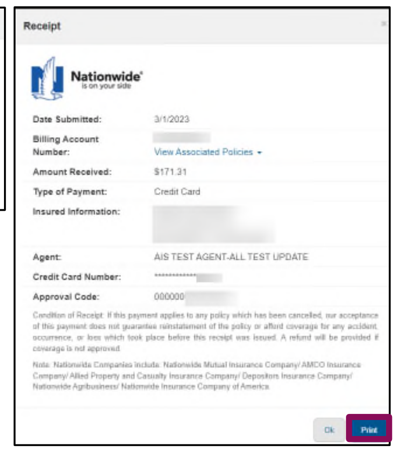
## Reprint Receipt

### Steps 1- 3

| Action | Screen |
|---|---|
| 1. To reprint a customer's receipt, go to the Billing Account History tab, find the appropriate "Account Payment" under "Transactions" and select the "View" link under "Action". |  |
| 2. Select the "View Receipt" button.<br>3. The receipt appears on the screen. Select the "Print" button to reprint the receipt. |   |

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