

# PL Billing Key Features (Agent Center)



## Home Page



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

1. [Billing Inquiry](#) (search for customer and billing account)
2. [Billing Account Summary](#)
  - a. [Billing Account History](#)
  - b. [Policy Billing at a Glance](#)
3. [Make a Payment](#)
  - a. [Billing Account- or Policy-Level Payments](#)
  - b. [Make a Payment – Payment Types](#)
  - c. [Make a Payment – Submit Payment](#)
  - d. [Set up Automatic Payments](#)
    - i. [Set up Automatic Credit Card Payments](#)
    - ii. [Set up Automatic EFT Payments](#)
  - e. [Update Automatic EFT Payments](#)
    - i. [Cancel EFT](#)
    - ii. [Change EFT Information](#)
    - iii. [Suspend EFT](#)
4. [Manage Pay Methods](#)
  - a. [Add Saved Payment Method During Bill Pay](#)
  - b. [Retrieve and Choose an Existing Saved Payment Method](#)
5. [Refunds](#) (EFT, Chase, Check, Bankcard)
  - a. [Refund Screenshots \(EFT, Bankcard, Check\)](#)
  - b. [Credit Card Refunds](#)
  - c. [Additional View of Refund Status](#)
6. [Reconciliation](#)
  - a. [Agency Sweep Account](#)
  - b. [Reconcile your Agency Sweep Account](#)
    - i. [All transactions](#)
    - ii. [NSF checks \(Request Reimbursement\)](#)
    - iii. [Delete payments](#)
  - c. [Payment Taken/Entered in Error](#)
  - d. [Waive Late Fees](#)
7. [Manage Billing Account](#)
  - a. [Change Due Date \(Next Invoice Date\)](#)
  - b. [Transfer money to a billing account](#)
  - c. [Transfer Account Payment](#)
  - d. [View Premium Details](#)
    - i. [Using the Billing Calculator](#)
  - e. [View Statements](#)
8. [Service Clients](#)
  - a. [Move Policy](#)
  - b. [Paperless Registration](#)
    - i. [New Paperless Registration – Not Registered on nationwide.com](#)
    - ii. [New Paperless Registration – Already Registered, Not signed up for Paperless](#)
    - iii. [View/Update Existing Paperless Registration](#)
    - iv. [Online Registration Invitation](#)
  - c. [Update Insured Information](#)
  - d. [Warnings and Notices](#)
9. [Reprint Important Documents](#)
  - a. [Reprint EFT Authorization Form](#)
  - b. [Reprint Receipt](#)

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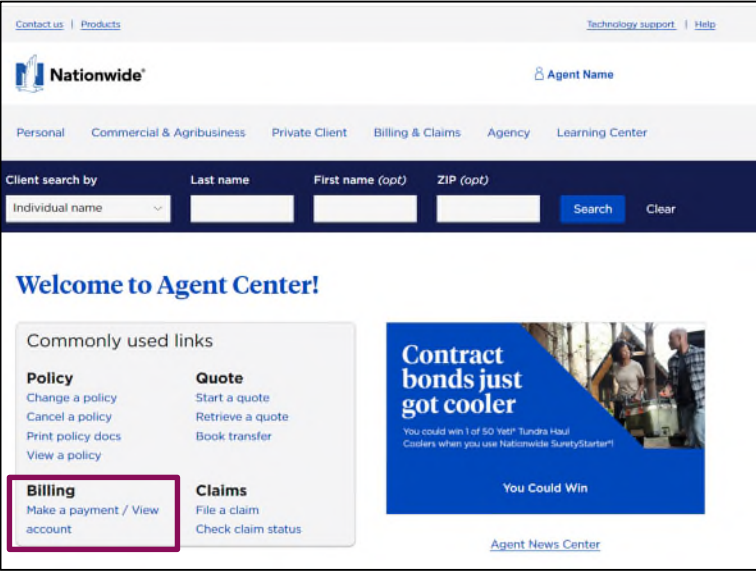
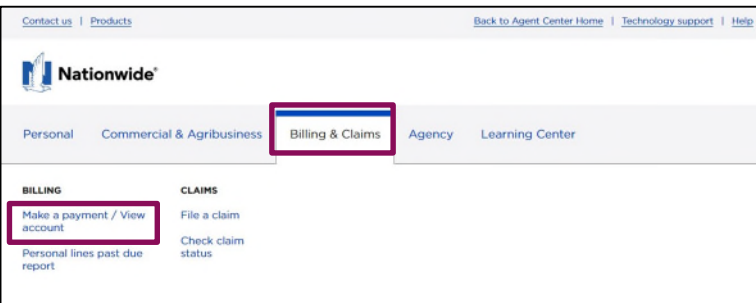

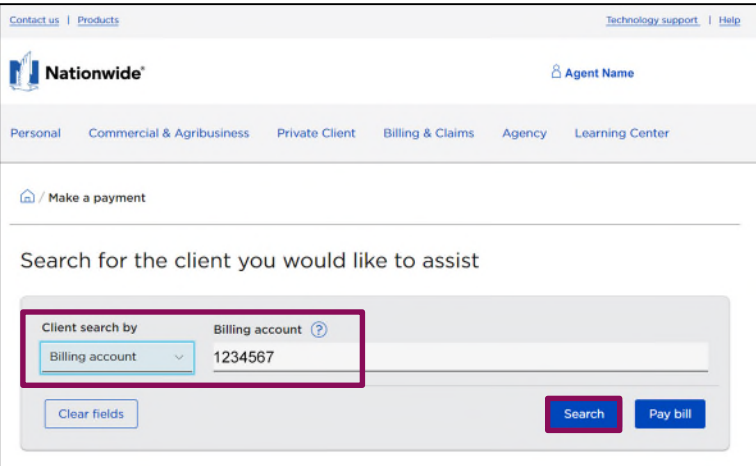
(2) I agree that the information contained in this training presentation is confidential and proprietary to Nationwide and may not be disclosed or provided to third parties without Nationwide's prior written consent.

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# Billing Inquiry

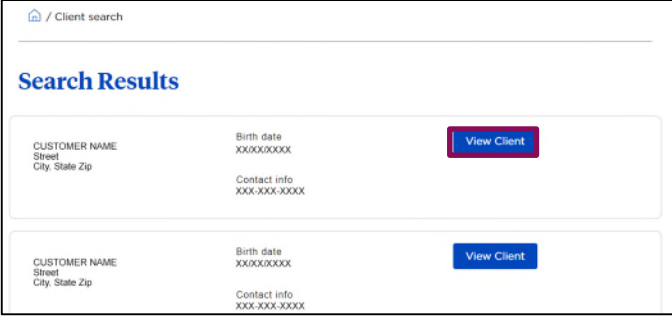
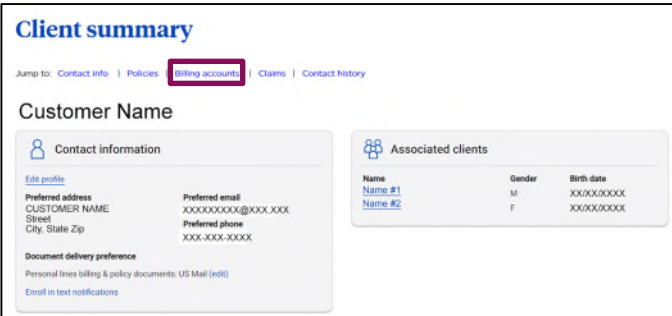
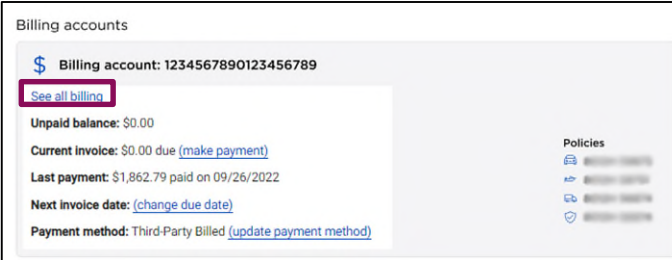
## Steps 1-4

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.	 <p>The screenshot shows the Nationwide Agent Center homepage. At the top, there are links for 'Contact us', 'Products', 'Technology support', and 'Help'. Below the Nationwide logo, there are tabs for 'Personal', 'Commercial &amp; Agribusiness', 'Private Client', 'Billing &amp; Claims', 'Agency', and 'Learning Center'. A 'Client search by' section includes a dropdown menu set to 'Individual name' and input fields for 'Last name', 'First name (opt)', and 'ZIP (opt)', with 'Search' and 'Clear' buttons. The main content area features a 'Welcome to Agent Center!' message and a 'Commonly used links' section. In this section, the 'Billing' link, which includes 'Make a payment / View account', is highlighted with a red box. Other links include 'Policy', 'Quote', and 'Claims'. To the right, there is a promotional banner for 'Contract bonds just got cooler'.</p>
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.	 <p>This screenshot shows the 'Billing &amp; Claims' tab selected in the top navigation bar. The 'BILLING' section on the left contains the link 'Make a payment / View account', which is highlighted with a red box. The 'CLAIMS' section on the right includes links for 'File a claim' and 'Check claim status'.</p>
3. For a full view of client information prior to paying a bill, use the “Client search by” dropdown.	 <p>The screenshot shows the 'Client search by' dropdown menu open. The dropdown is highlighted with a red box, and it lists several search criteria: 'Individual name', 'Company name', 'Policy number', and 'Billing account'.</p>
4. To search by billing account, key the billing account number and select “Search”.	 <p>This screenshot shows the 'Make a payment' screen. The 'Client search by' dropdown is set to 'Billing account', and the billing account number '1234567' is entered in the adjacent field. The 'Search' button is highlighted with a red box. There is also a 'Pay bill' button.</p>

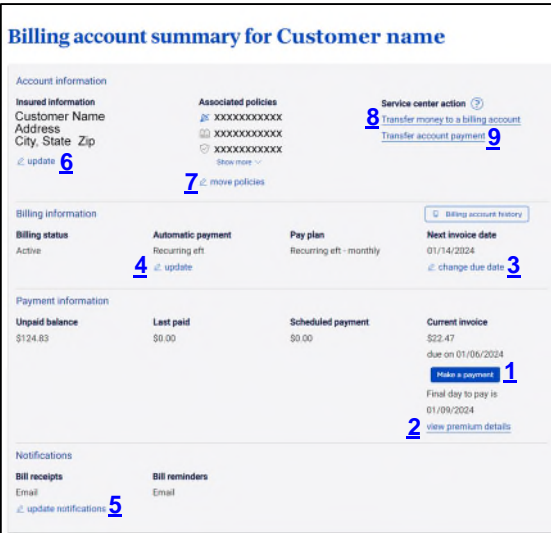


## Billing Inquiry (cont'd)

## 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 <a href="#">link</a> to the desired task. For additional billing tasks, select “See all billing”.	

## Billing Account Summary

Action	Screen
<p>“Billing Account Summary” displays and provides information on the billing account such as account information, billing information, payment information, etc.</p> <p>Select the <b>number</b> by the billing task to review its functionality.</p>	



## 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

**Billing account summary for Customer name**

Account information

Insured information  
Customer Name  
Address  
City, State Zip

Associated policies  
XXXXXXXXXXXX  
XXXXXXXXXXXX  
XXXXXXXXXXXX

Service center action  
[Transfer money to a billing account](#)  
[Transfer account payment](#)

[Billing account history](#)

Billing information

Billing status: Active  
Automatic payment: Recurring eft  
Pay plan: Recurring eft - monthly  
Next invoice date: 01/14/2024

Payment information

Unpaid balance: \$124.03  
Last paid: \$0.00  
Scheduled payment: \$0.00  
Current invoice: \$22.47  
Due on: 01/09/2024  
Final day to pay is: 01/09/2024

Notifications  
Bill receipts: Email  
Bill reminders: Email

**Account history XXXXXXXXXX for Customer Name**

Search by policies (Homeowner, Auto, Personal Umbrella)  
(optional)

All  
Homeowner  
Auto  
Personal Umbrella

Start Date: 12/04/2022  
End Date: 12/04/2023

Go

All  
Debits/credits  
Customer communications  
User comments

Start Date: xx/xx/xxxx  
End Date: xx/xx/xxxx

Go

Return to billing account summary

Search by policies (Homeowner, Auto, Personal Umbrella)  
(optional)

All

Filter By (optional)  
All

Start Date: 12/04/2022  
End Date: 12/04/2023

Go

Processed	Transaction	Description	Debit/Credit	Balance	Action
11/14/2023	Email Address Change	OLD EMAIL: NEW EMAIL: DATE CHANGED: 2023-11-13 USERID: INTERNET		\$4,828.32	
11/10/2023	Paperless Statement	FULL PAY AMT OF \$4,828.32, MIN AMT OF \$400.94, DUE DATE: 12-04-2023		\$4,828.32	<a href="#">View</a>
11/10/2023	Billed Amount	Installment in the amount of \$23.41 was billed.		\$4,828.32	
11/10/2023	Billed Amount	Installment in the amount of \$379.71 was billed.		\$4,828.32	
11/10/2023	Billed Amount	Installment in the amount of -\$9.18 was billed. (Prior Term Amount)		\$4,828.32	
11/10/2023	Installment Fee	Reversible if paid in full	\$7.00	\$4,828.32	
10/31/2023	Policy Renewal	Renewal transaction was processed.	\$4,556.56	\$4,828.32	
10/31/2023	Policy Renewal	Renewal transaction was processed.	\$280.94	\$271.76	
10/04/2023	Policy Change	Decrease in Coverage transaction was processed.	-\$9.18	-\$9.18	

Items per page: 10 1 - 10 of 12

Return to billing account summary



## Policy billing at a glance

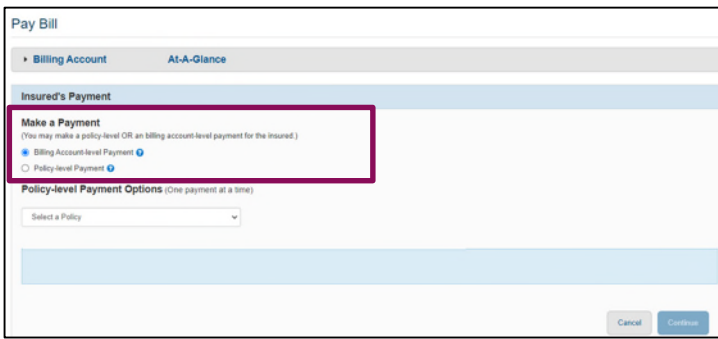
### Steps 1-2

Action	Screen																																																
<div><div>1. You can view “Policy billing at a glance” below “Billing account summary”.</div><div>2. The policy/policies on the billing account display. You can select the “v” to view the policy information for each policy.</div></div>	<div><div><div>Policy billing at a glance1</div><div><div><div>Policy information AutoXXXXXXXXXXXX</div><div><table><tr><td>Policy status</td><td>Current amount due</td><td>Total unpaid balance</td><td>Total premium</td></tr><tr><td>Active</td><td>\$604.08</td><td>\$604.08</td><td>\$1,129.60</td></tr><tr><td>Term months</td><td>Months remaining</td><td>Renewal date</td><td>Equity date</td></tr><tr><td>NA</td><td>11</td><td>NA</td><td>05/22/2024</td></tr><tr><td>Original effective date</td><td>Cancel effective date</td><td colspan="2">Non renewal indicator</td></tr><tr><td>NA</td><td>NA</td><td colspan="2">N</td></tr></table></div></div></div><div><div>2</div><div><div><div>Policy information Personal UmbrellaXXXXXXXXXXXX</div><div><div><div>Policy information HomeownerXXXXXXXXXXXX</div><div><table><tr><td>Policy status</td><td>Current amount due</td><td>Total unpaid balance</td><td>Total premium</td></tr><tr><td>Active</td><td>\$370.53</td><td>\$4,547.38</td><td>\$4,556.56</td></tr><tr><td>Term months</td><td>Months remaining</td><td>Renewal date</td><td>Equity date</td></tr><tr><td>NA</td><td>11</td><td>NA</td><td>12/05/2023</td></tr><tr><td>Original effective date</td><td>Cancel effective date</td><td colspan="2">Non renewal indicator</td></tr><tr><td>NA</td><td>NA</td><td colspan="2">N</td></tr></table></div></div></div></div></div></div></div></div>	Policy status	Current amount due	Total unpaid balance	Total premium	Active	\$604.08	\$604.08	\$1,129.60	Term months	Months remaining	Renewal date	Equity date	NA	11	NA	05/22/2024	Original effective date	Cancel effective date	Non renewal indicator		NA	NA	N		Policy status	Current amount due	Total unpaid balance	Total premium	Active	\$370.53	\$4,547.38	\$4,556.56	Term months	Months remaining	Renewal date	Equity date	NA	11	NA	12/05/2023	Original effective date	Cancel effective date	Non renewal indicator		NA	NA	N	
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## Make a Payment

### Billing Account- or Policy-Level Payments

### Steps 1-2

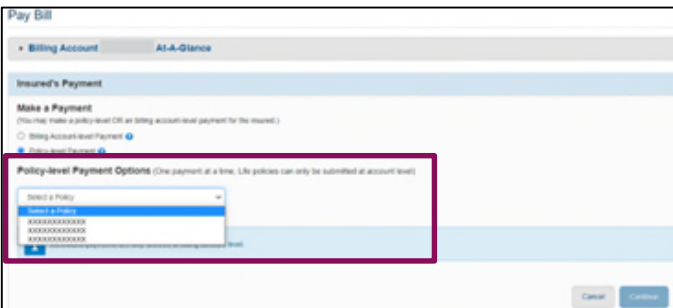
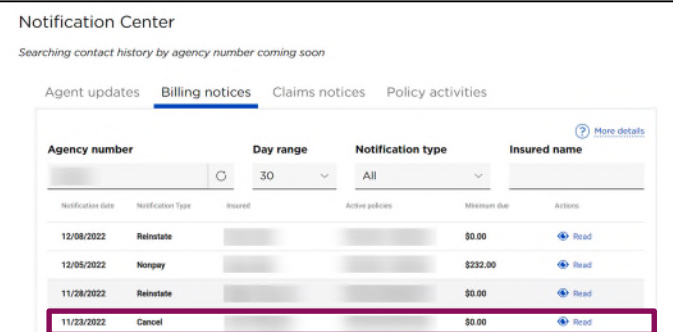
Action	Screen
<ol style="list-style-type: none"> <li>Once you select “Make a Payment” from the Billing account summary or one of the other ways available to you, there are two “Make a Payment” options: “Billing Account-Level Payment” or “Policy-Level payment”.</li> <li>If there is more than one policy 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.</li> </ol> <p>NOTE: Account- vs Policy-Level makes a difference if:</p> <ul style="list-style-type: none"> <li>only one of the policies is past due (currently in non-pay status) OR</li> <li>the customer wants to pay more than the minimum.</li> </ul> <p>If you choose Account-Level to pay, any overpayment will go to the account or toward future account bills.</p>	 <p>Pay Bill</p> <p>Billing Account At-A-Glance</p> <p>Insured's Payment</p> <p>Make a Payment (You may make a policy-level OR an billing account-level payment for the insured.)</p> <p><input checked="" type="radio"/> Billing Account-Level Payment</p> <p><input type="radio"/> Policy-Level Payment</p> <p>Policy-Level Payment Options (One payment at a time)</p> <p>Select a Policy</p> <p>Cancel Continue</p>





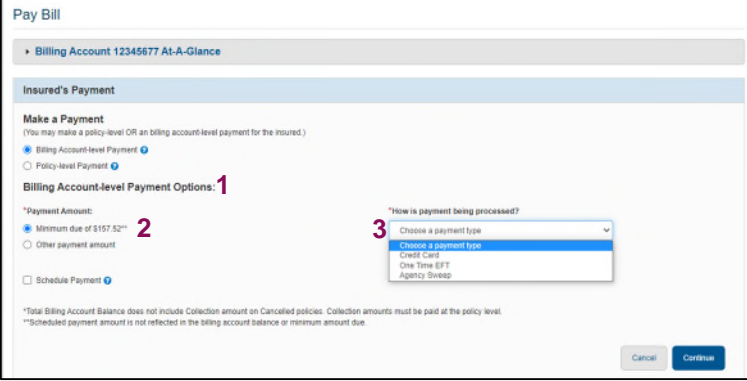
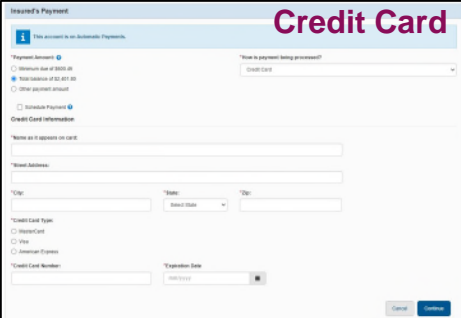
## Billing Account- or Policy-Level Payments (cont'd)

### 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.	
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.	
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".	

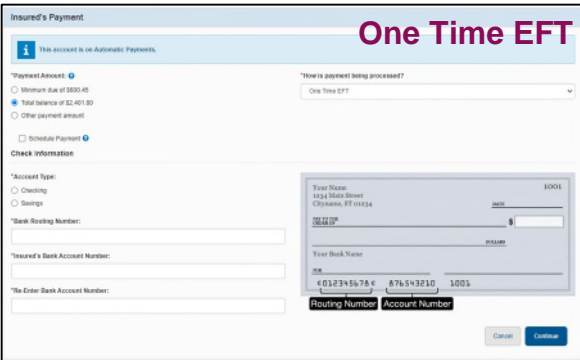
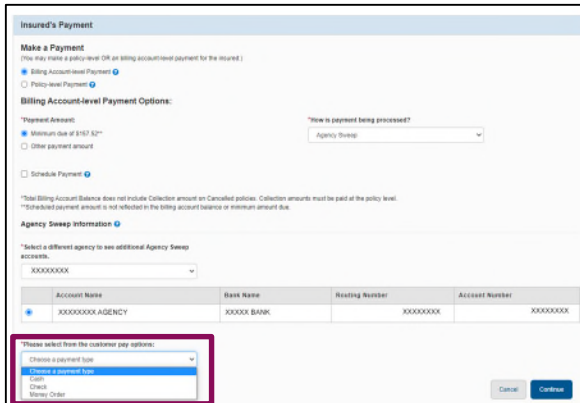
Nationwide accepts the following credit cards:

- ✓ Visa,
- ✓ MasterCard,
- ✓ Discover, AND
- ✓ American Express



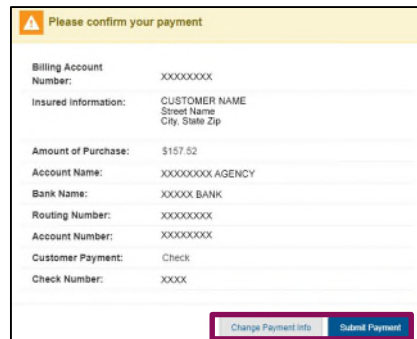
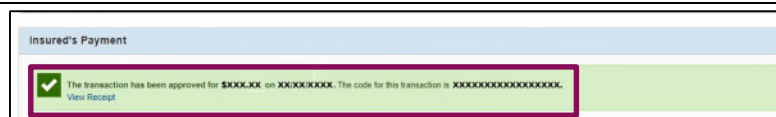
## Make a Payment – Payment Types (cont'd)

## 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.	

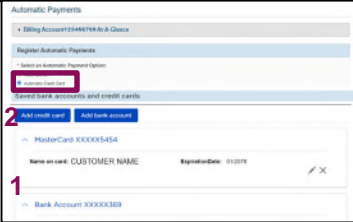
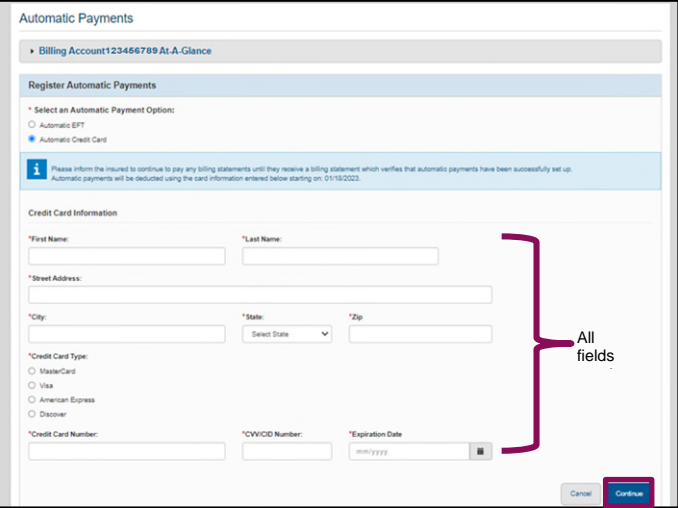
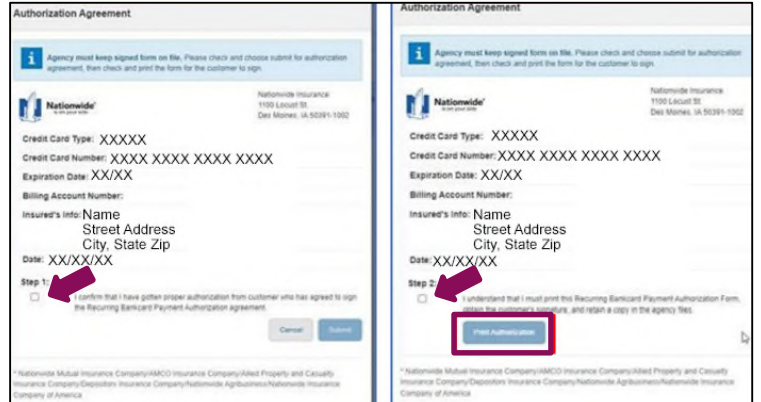


## Set up Automatic Payments

Action	Screen
<p>This screen displays when selecting “update” in “Automatic Payments”. “Select an Automatic Payment Option” (either “Automatic EFT” or “Automatic Credit Card”).</p> <p><b>Note:</b> 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 <b>Remove</b> steps listed below to change to direct billed, then follow <b>Add</b> steps above for new pay method.</p>	

## Set up Automatic Credit Card Payments

### Steps 1-4

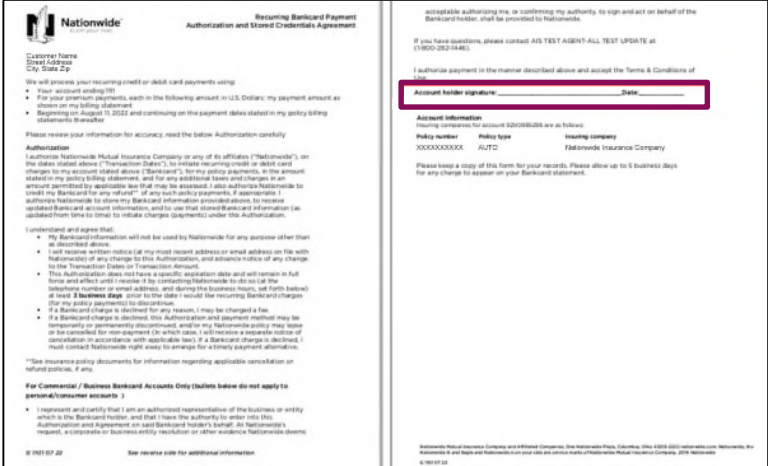
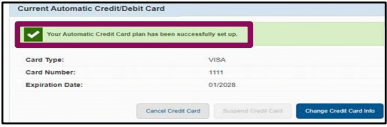
Action	Screen
<p>1. If “Automatic Credit Card” is chosen, a table with saved credit cards will appear in the Credit Card Information field (if applicable).</p> <p>2. To add a credit card, select “Add credit card”.</p>	
<p>3. Enter the Credit Card information. All fields are required. Select “Continue”.</p>	
<p>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 &amp; 2 and complete the authorization form. Select “Print Authorization”.</p>	





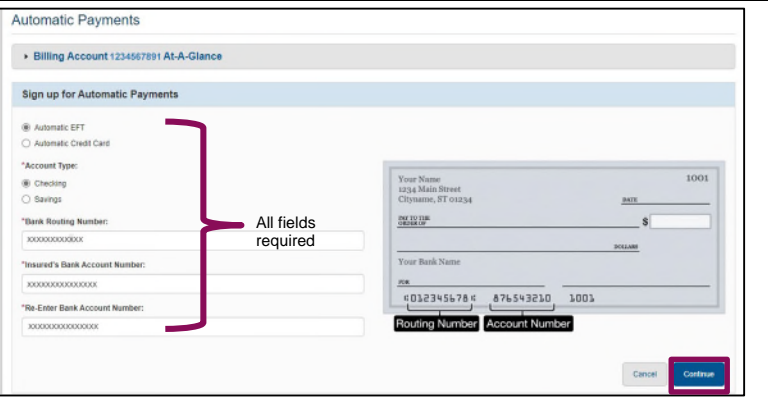

## Set up Automatic Credit Card Payments (cont'd)

### 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

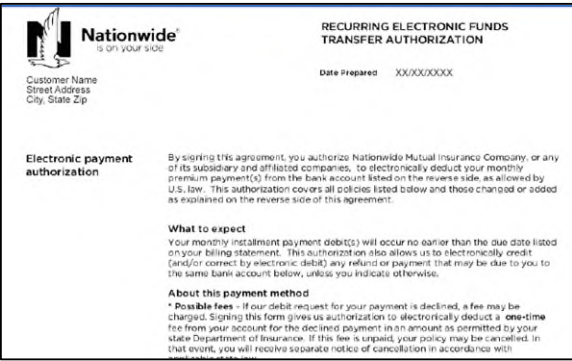
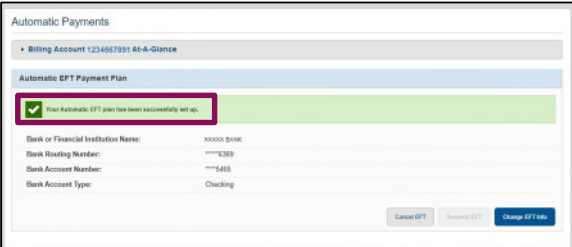
### Steps 1-2

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. <ul style="list-style-type: none"> <li><b>Step 1:</b> 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.</li> <li><b>Step 2:</b> Select the second checkbox to activate the REFT Authorization form link to open it.</li> </ul>	



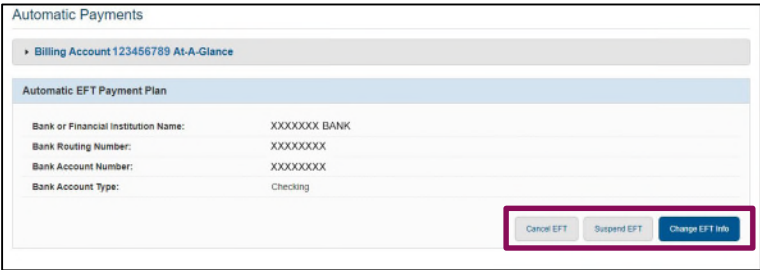
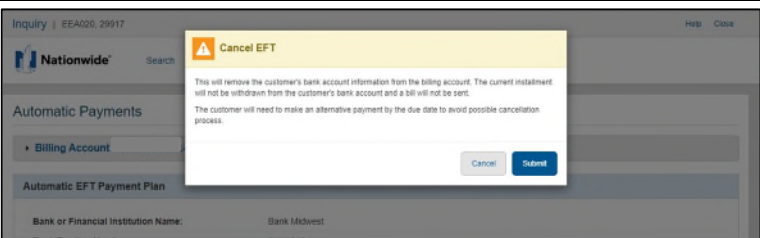
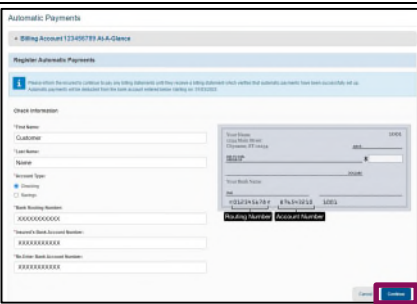
## Set up Automatic EFT Payments (cont'd)

### 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

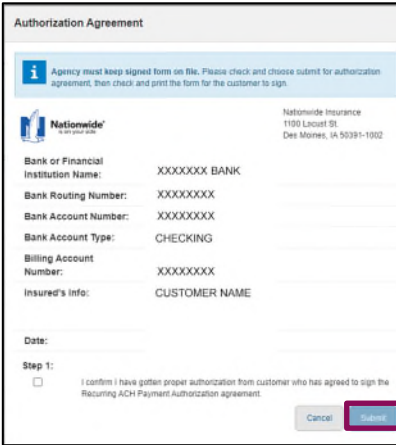
### Steps 1-2

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”.	
<b>Cancel EFT</b> 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.	
<b>Change EFT Info</b> 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”.	



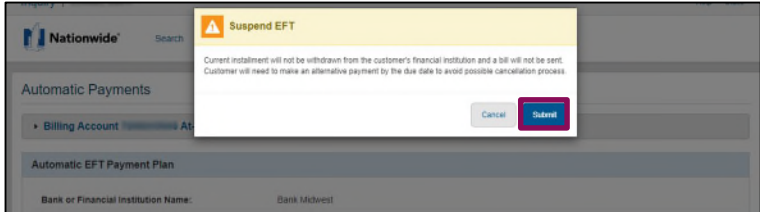
## Update Automatic EFT Payments – Cancel and Change EFT Info (cont'd)

## 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

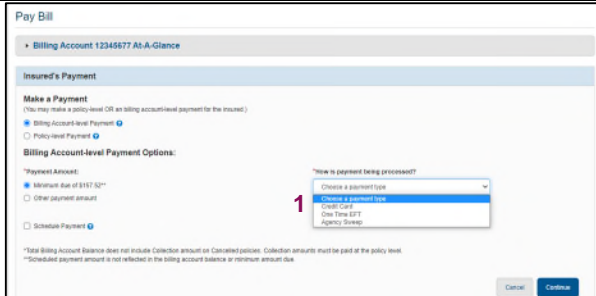
## Steps 1-2

Action	Screen
<b>Suspend EFT</b> 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. 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

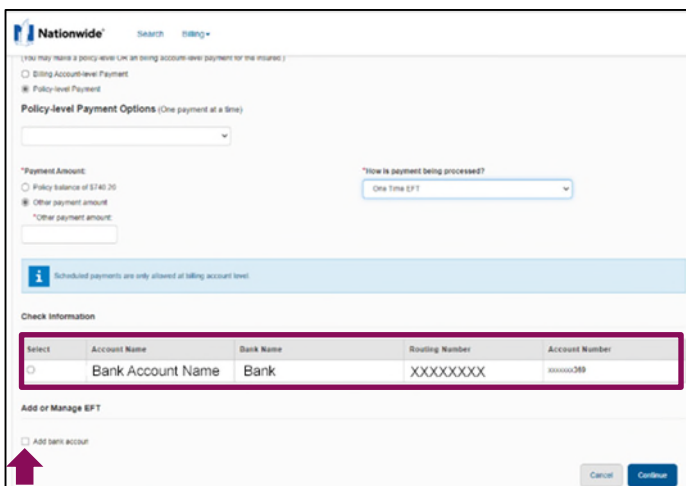
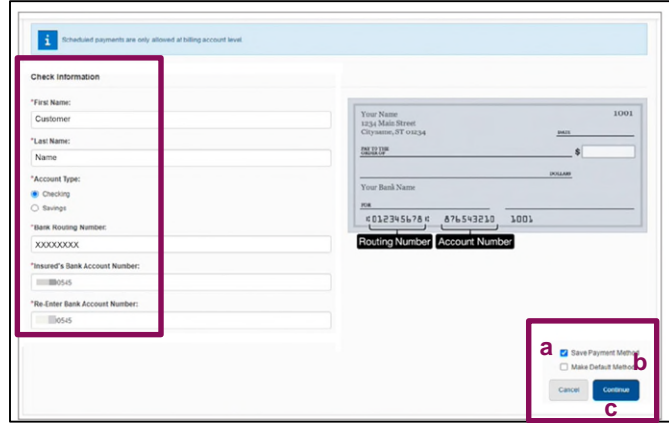
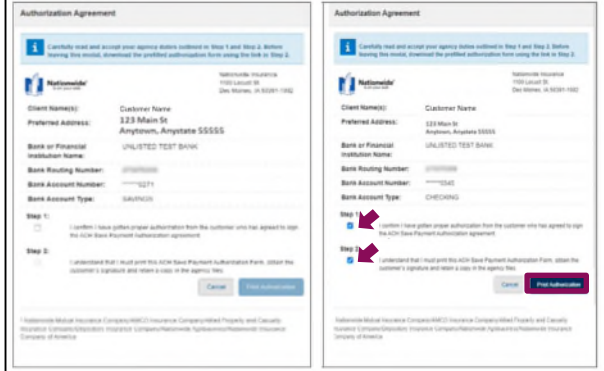

## Step 1

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	



# Add Saved Payment Method During Bill Pay (cont'd)

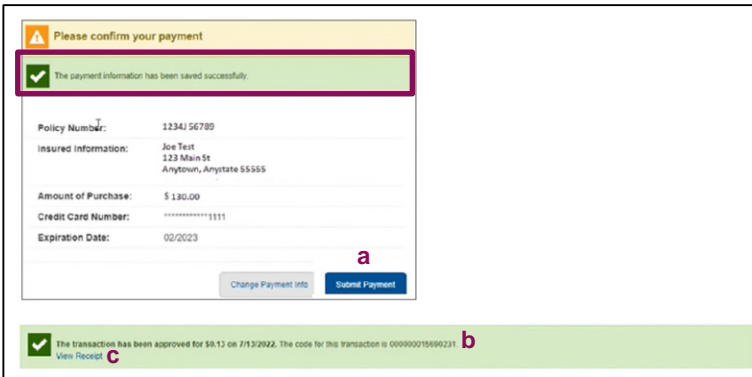
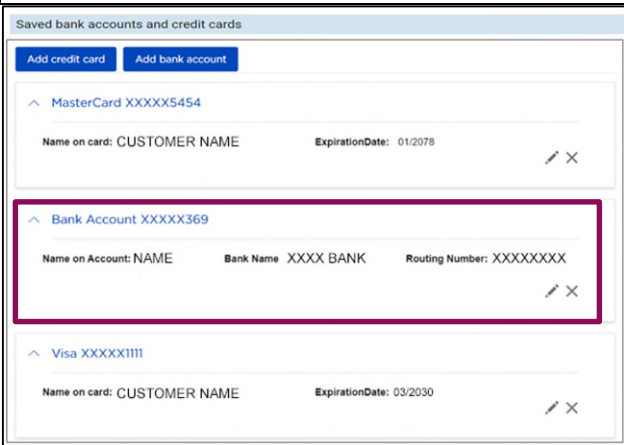
## Steps 2-6

Action	Screen
<p>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. <b>(This example is for EFT.)</b></p> <p>3. To add a new payment method, select the box next to "Add bank account" and select "Continue".</p>	
<p>4. In the "Check Information" enter the appropriate information in the required fields.</p> <ol style="list-style-type: none"> <li>Select "Save Payment Method".</li> <li>If this account should be designated as the default payment method, select "Make Default Method".</li> <li>Select "Continue".</li> </ol>	
<p>5. The Authorization Agreement appears. For authorization, check Step 1 and Step 2. Select "Print Authorization".</p>	
<p>6. The ACH form will open in a new browser. Download and have the customer sign. Retain a copy in the agency office.</p>	



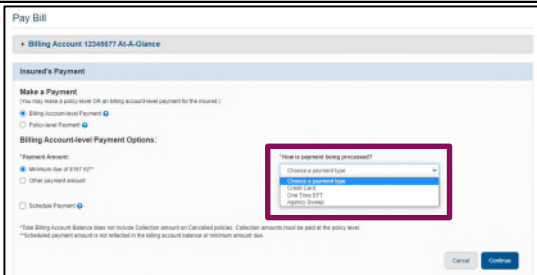
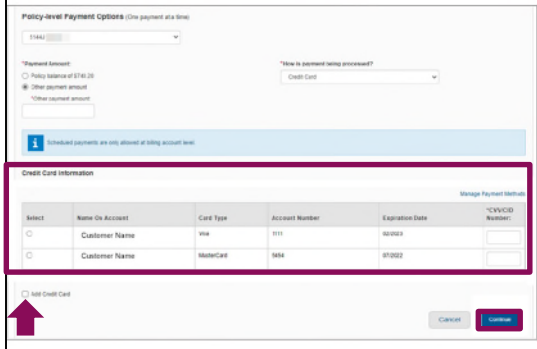
## Add Saved Payment Method During Bill Pay (cont'd)

## Steps 7-8

Action	Screen
7. A box appears confirming that the payment method has been saved successfully. a. Select "Submit Payment" to pay the bill. b. A confirmation box appears to confirm that the payment has been received. 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

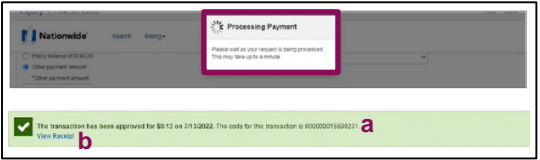
Action	Screen
1. On the Make a Payment screen, select payment type from the "How is payment being processed?" dropdown, either Credit Card or One Time EFT	
2. Once you choose a payment type, any existing saved payment method will appear in the table. (This example is for credit card.)  To pay the bill,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





## Retrieve and Choose Existing Saved Payment Method

### Step 3

Action	Screen
3. A "Processing Payment" box appears. a. Once payment is complete, a transaction approved message appears. 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
<b>Bankcard</b>	If last payment was made with a bankcard and the refund is $\leq$ 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).
<b>EFT Refund</b>	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).
<b>Chase Refund</b>	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).	<ul style="list-style-type: none"> <li>Client has 7 calendar days to accept digital deposit. Once client accepts the Chase refund, they will receive refund in 1-2 business days.</li> <li>If no action is taken within those 7 calendar days, the refund will be mailed to the client. (See Check Refund Timeline).</li> <li>Client's <b>do not</b> have to have a Chase bank account to be eligible for this refund method.</li> </ul>
<b>Check Refund</b>	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)

- In Agent Center's "Billing Account History", refund information displays for 90 days, but you can go back longer using the search filters.
- 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"](#).

Account history xxxxxxxxxx for Customer Name

Search by policies (Auto) (optional)

Filter By (optional)

Start Date: 10/15/2023 End Date: 12/15/2023

Use this format: MM/DD/YYYY

**EFT Refund**

Processed	Transaction	Description	Debit/Credit	Balance	Action
12/12/2023	Paperless Renewal Statement	Full amount due \$305.87. Due Date 01/13/2024.	\$305.87		<a href="#">View</a>
12/12/2023	Billed Amount	Installment in the amount of \$30.59 was billed.	\$305.87		
12/16/2023	Policy Renewal	Renewal transaction was processed.	\$335.87	\$305.87	
12/01/2023	Electronic Communication	An EFT refund confirmation email was sent to the customer on 2023-12-01 confirming that a refund was sent for policy.	\$0.00		
12/01/2023	EFT Refund	\$31.18 Refund. Recent change in your policy.	\$31.18	\$0.00	
11/30/2023	Policy Change	Change in Policy Balance transaction was processed.	\$31.18	\$31.18	
11/30/2023	User Comment	A RESERVE WAS PERFORMED ON PRIOR TERMS ON 11/30/2023 DUE TO A SMARTPHONE DRIVER AND/OR POLICY SCORE ISSUE. INTEREST WAS CALCULATED AND APPLIED TO THE BAL.	\$0.00		

Items per page: 30 1-7 of 7

[Return to billing account summary](#)

**Events impacting this bill**

Billing account (XXXXXXXXXX)  
Effective 12/01/2023

- You were issued a refund of \$31.18. Effective 07/25/2023
- You were issued a refund of \$15.94. Effective 01/13/2024

AUTO (XXXXXXXXXX)  
Effective 01/13/2024

- Your policy renewed.

Account history xxxxxxxxxx for Customer Name

Search by policies (Auto) (optional)

Filter By (optional)

Start Date: 10/15/2023 End Date: 12/15/2023

Use this format: MM/DD/YYYY

**Bank Card Refund**

Processed	Transaction	Description	Debit/Credit	Balance	Action
10/16/2023	Electronic Communication	A BANK CARD REFUND VOUCHER (EMAIL) WAS GENERATED FOR: XXXXXXXX@XXX.XXX DATE: 2023-10-16 USERID: XXXXXXXX	\$0.00		

Items per page: 10 1-1 of 1

[Return to billing account summary](#)

Account history xxxxxxxxxx for Customer Name

Search by policies (Auto) (optional)

Filter By (optional)

Start Date: 09/25/2023 End Date: 12/15/2023

Use this format: MM/DD/YYYY

**Check Refund**

Processed	Transaction	Description	Debit/Credit	Balance	Action
09/25/2023	Refund Check	\$24.53 Refund. Recent change in your policy.	\$24.53	\$0.00	

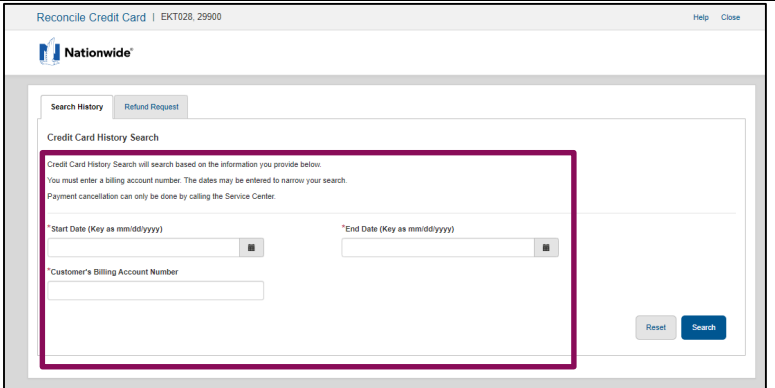
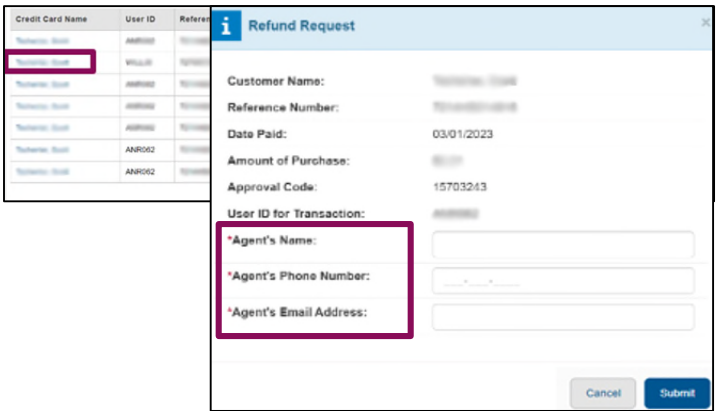
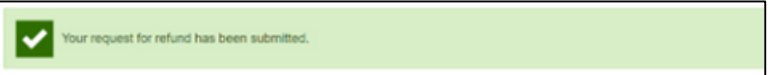
Items per page: 30 1-1 of 1

[Return to billing account summary](#)

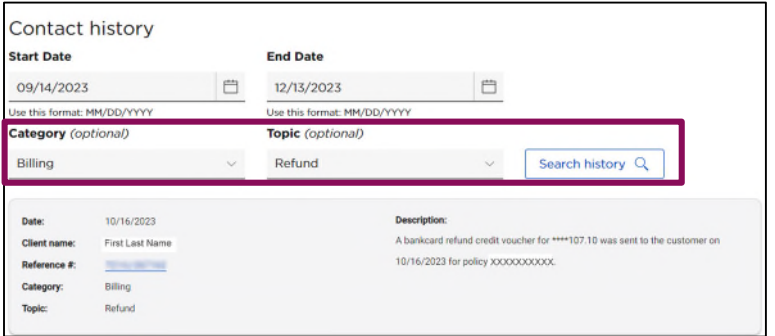


## Credit Card Refunds

## 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.	

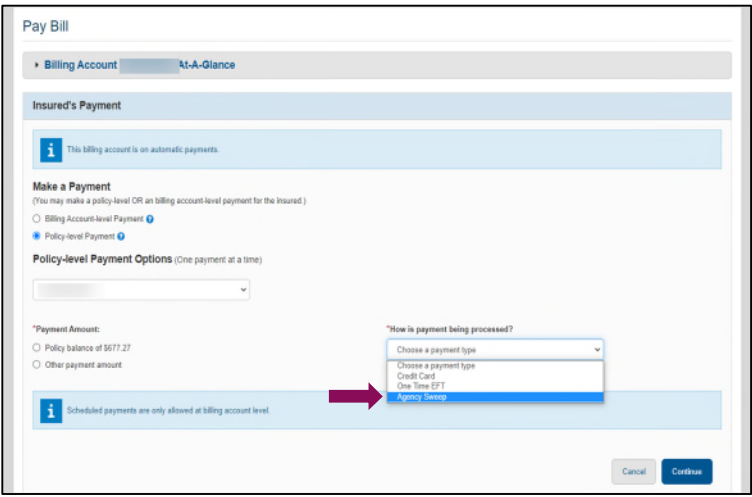
## Additional View of Refund Status

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.	



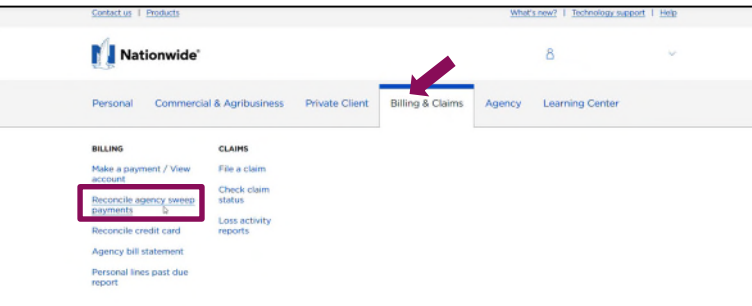
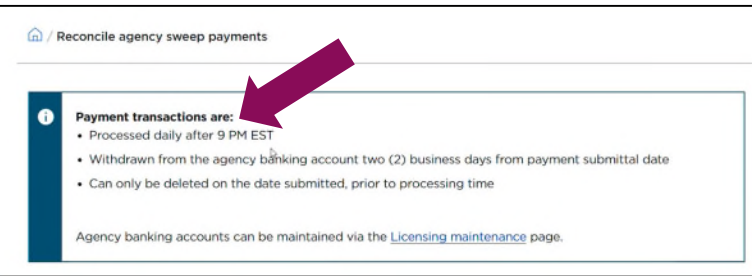


## Reconciliation

### Agency Sweep Account

Action	Screen
<p>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".</p> <div> <p><b>Day 1</b> Payment is recorded in Agent Center Billing</p> <p><b>Day 3</b> Account sweep occurs</p> </div> <p><u>Payment transactions:</u></p> <ol style="list-style-type: none"> <li>Are processed daily after 9 pm ET.</li> <li>Are withdrawn from agency banking account two business days from payment submittal date.</li> <li>Can only be deleted on the date submitted, prior to processing time.</li> </ol>	

## Reconcile Your Agency Sweep Account

### Steps 1-4

Action	Screen
<ol style="list-style-type: none"> <li>Access "Reconcile agency sweep payments" under the "Billing &amp; Claims" Tab on Agent Center Workspace.</li> </ol>	
<ol style="list-style-type: none"> <li>An information box displays with important payment transaction details.</li> </ol>	
<ol style="list-style-type: none"> <li>Your primary agency number will populate in the "Agency number" section; however, you can input a different agency number if applicable.</li> </ol>	
<ol style="list-style-type: none"> <li>Just as you see today, you have 3 tabs available to you: "All transactions", "NSF checks" or "Delete payments".</li> </ol>	



## All Transactions Tab

### Steps 1-3

Action	Screen
<ol style="list-style-type: none"> <li>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.</li> <li>Select the "Search" button. Your search results display.</li> <li>To print, you can export the results to an Excel spreadsheet by selecting the "Export" button and print.</li> </ol>	

## NSF Checks Tab (Request Reimbursement)

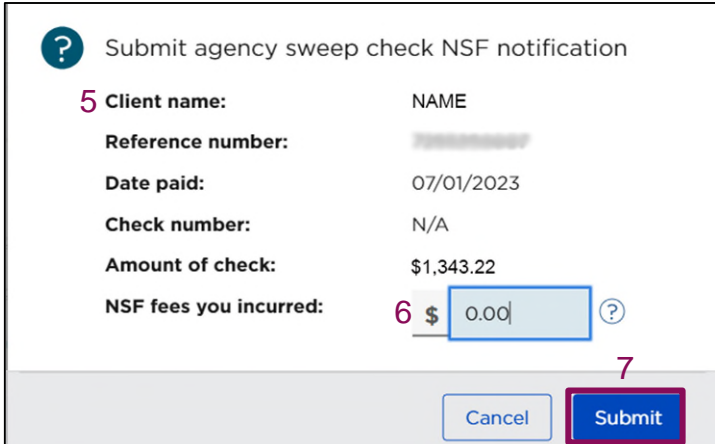
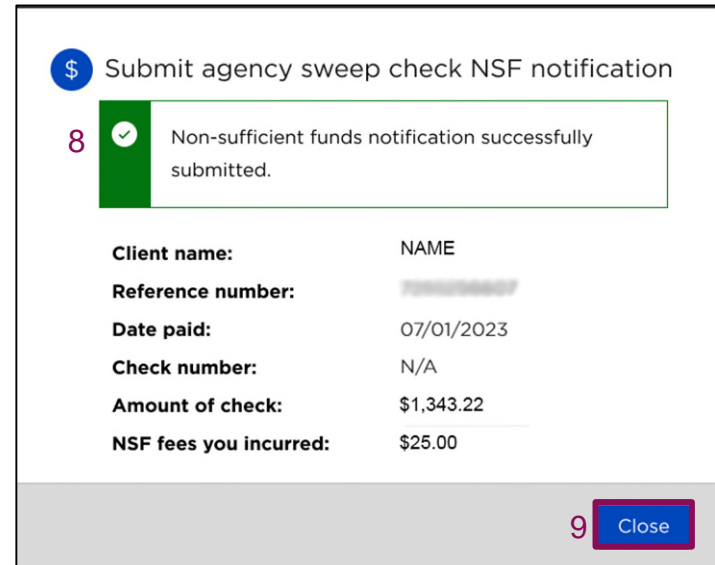
### Steps 1-4

Action	Screen
<ol style="list-style-type: none"> <li>You can search for the NSF check by client name (required) and check number (optional).</li> <li>Select the "Search" button to display results.</li> </ol>	
<ol style="list-style-type: none"> <li>Read the information box for important information.</li> <li>Select the appropriate client under the "Action" column.</li> </ol>	



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

## Steps 5-9

Action	Screen
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.	 <p>Submit agency sweep check NSF notification</p> <p>5 Client name: NAME</p> <p>Reference number: [redacted]</p> <p>Date paid: 07/01/2023</p> <p>Check number: N/A</p> <p>Amount of check: \$1,343.22</p> <p>NSF fees you incurred: 6 \$ 0.00 ?</p> <p>7 Submit</p> <p>Cancel</p>
	 <p>Submit agency sweep check NSF notification</p> <p>8 Non-sufficient funds notification successfully submitted.</p> <p>Client name: NAME</p> <p>Reference number: [redacted]</p> <p>Date paid: 07/01/2023</p> <p>Check number: N/A</p> <p>Amount of check: \$1,343.22</p> <p>NSF fees you incurred: \$25.00</p> <p>9 Close</p>

## Delete Payments Tab

## Steps 1-2

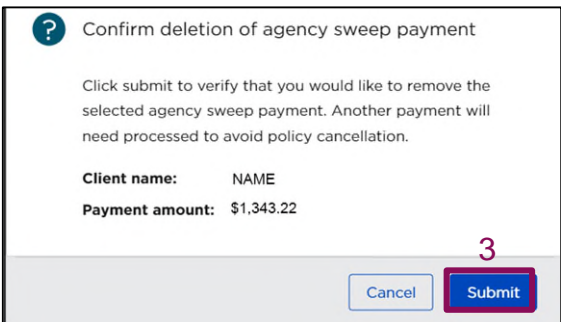
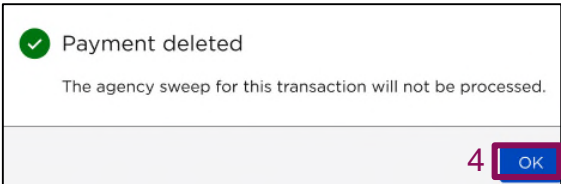
Action	Screen																								
<p>When daily reconciling your agency sweep account, you find that a payment was entered incorrectly. The information box indicates that a payment transaction can only be deleted on the date submitted, prior to processing time.</p> <ol style="list-style-type: none"><li>1. Select the “Delete payments” tab. The payments received today display.</li><li>2. Choose the appropriate client name by selecting “Delete” under the “Action” column.</li></ol>	<div><div><div><div></div><div>Payment transactions are:<ul style="list-style-type: none"><li>• Processed daily after 9 PM EST</li><li>• Withdrawn from agency the banking account two (2) business days from payment submittal date</li><li>• Can only be deleted on the date submitted, prior to processing time</li></ul></div><div>Agency banking accounts can be maintained via the Licensing Maintenance page.</div></div><div><h3>Reconcile agency sweep payments</h3><div>Agency number<div>Select</div></div><div>All transactionsNSF checksDelete payments1</div><table><tr><th>Date of submission</th><th>Client name</th><th>Reference number</th><th>Check number</th><th>Payment amount</th><th>Action</th></tr><tr><td>02/01/2023</td><td>NAME</td><td></td><td>N/A</td><td>\$104.22</td><td>Delete</td></tr><tr><td>02/02/2023</td><td>NAME</td><td></td><td></td><td>\$23.43</td><td>Delete</td></tr><tr><td>02/02/2023</td><td>NAME</td><td></td><td></td><td>\$1,203.42</td><td>Delete2</td></tr></table></div></div></div>	Date of submission	Client name	Reference number	Check number	Payment amount	Action	02/01/2023	NAME		N/A	\$104.22	Delete	02/02/2023	NAME			\$23.43	Delete	02/02/2023	NAME			\$1,203.42	Delete2
Date of submission	Client name	Reference number	Check number	Payment amount	Action																				
02/01/2023	NAME		N/A	\$104.22	Delete																				
02/02/2023	NAME			\$23.43	Delete																				
02/02/2023	NAME			\$1,203.42	Delete2																				





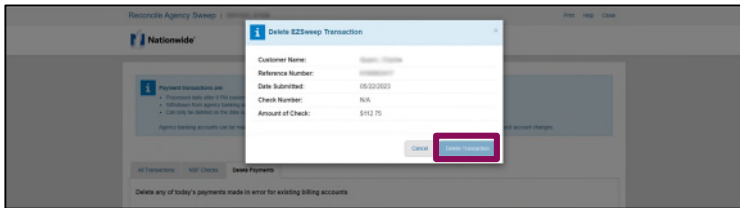
## Delete Payments Tab (cont'd)

## Steps 3-4

Action	Screen
<p>3. A pop-up message displays asking you to confirm that you want to delete the selected agency sweep payment. Select "Confirm" to proceed.</p> <p>4. A success message displays. Select the "OK" button when finished.</p>	 <p>Confirm deletion of agency sweep payment</p> <p>Click submit to verify that you would like to remove the selected agency sweep payment. Another payment will need processed to avoid policy cancellation.</p> <p>Client name: NAME</p> <p>Payment amount: \$1,343.22</p> <p>3</p> <p>Cancel Submit</p>  <p>Payment deleted</p> <p>The agency sweep for this transaction will not be processed.</p> <p>4 OK</p>

## Payment Taken/Entered in Error

## Steps 1-2

Action	Screen
<p>To correct a payment taken or entered in error by deleting the entry <b>prior to the daily cutoff of 9:00 pm ET</b>. If it's after this time, contact ITSD to escalate a ticket.</p> <p>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.</p> <p>2. Then go back to the billing account to re-enter it correctly in the make a payment function.</p>	 <p>Delete EZSweep Transaction</p> <p>Customer Name: [field]</p> <p>Reference Number: [field]</p> <p>Date Submitted: 05/22/2023</p> <p>Check Number: N/A</p> <p>Amount of Check: \$102.75</p> <p>Cancel Delete Transaction</p>

## Waive Late Fees

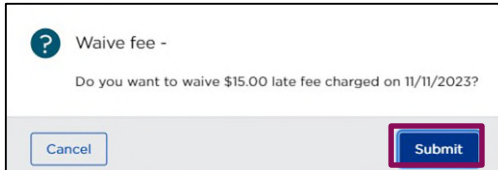
## Step 1

Action	Screen																																										
<p>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.</p> <p>a. When you select the “?” a message box displays: “Only one fee may be waived per 12-month period on this policy.”</p>	<div><div>Account history XXXXXXXXX for Customer Name</div><div><div>Search by policies (Auto, Property, Homeowner) (optional)</div><div>All</div><div>Filter By (optional)</div><div>All</div><div>Start Date12/01/2022End Date12/01/2023</div><div>Use this format: MM/DD/YYYYUse this format: MM/DD/YYYY</div><div><table><thead><tr><th>Processed</th><th>Transaction</th><th>Description</th><th>Date/Credit</th><th>Balance</th><th>Action</th></tr></thead><tbody><tr><td>05/15/2023</td><td>Installation Fee</td><td>Installation fee in the amount of \$7.00 was billed.</td><td>\$7.00</td><td>\$115.50</td><td></td></tr><tr><td>05/08/2023</td><td>Account Payment</td><td>A Payment was received on 05/08/2023 at 10:20 AM.</td><td>-\$145.13</td><td>\$588.53</td><td><a href="#">View</a></td></tr><tr><td>08/21/2023</td><td>Statement</td><td>Full pay amt of \$467.46, MIN AMT of \$145.13, DUE DATE:</td><td>08/21/2023</td><td></td><td><a href="#">View</a></td></tr><tr><td>08/17/2023</td><td>Late Fee</td><td>Late Fee (Default) transaction was processed.</td><td>\$15.00</td><td>\$164.79</td><td><a href="#">Waive Fee ?</a></td></tr><tr><td>08/17/2023</td><td>Late Fee</td><td>Late Fee in the amount of \$15.00 was billed.</td><td>\$15.00</td><td>\$169.79</td><td></td></tr><tr><td>07/08/2023</td><td>Statement</td><td>Full pay amt of \$762.79, MIN AMT of \$145.13, DUE DATE:</td><td>08/14/2023</td><td></td><td><a href="#">View</a></td></tr></tbody></table></div><div>Items per page: 1011 - 10 of 12</div><div><a href="#">Return to billing account summary</a></div></div><div><div>Only one fee may be waived per 12 months period on this policy.</div></div></div>	Processed	Transaction	Description	Date/Credit	Balance	Action	05/15/2023	Installation Fee	Installation fee in the amount of \$7.00 was billed.	\$7.00	\$115.50		05/08/2023	Account Payment	A Payment was received on 05/08/2023 at 10:20 AM.	-\$145.13	\$588.53	<a href="#">View</a>	08/21/2023	Statement	Full pay amt of \$467.46, MIN AMT of \$145.13, DUE DATE:	08/21/2023		<a href="#">View</a>	08/17/2023	Late Fee	Late Fee (Default) transaction was processed.	\$15.00	\$164.79	<a href="#">Waive Fee ?</a>	08/17/2023	Late Fee	Late Fee in the amount of \$15.00 was billed.	\$15.00	\$169.79		07/08/2023	Statement	Full pay amt of \$762.79, MIN AMT of \$145.13, DUE DATE:	08/14/2023		<a href="#">View</a>
Processed	Transaction	Description	Date/Credit	Balance	Action																																						
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08/17/2023	Late Fee	Late Fee (Default) transaction was processed.	\$15.00	\$164.79	<a href="#">Waive Fee ?</a>																																						
08/17/2023	Late Fee	Late Fee in the amount of \$15.00 was billed.	\$15.00	\$169.79																																							
07/08/2023	Statement	Full pay amt of \$762.79, MIN AMT of \$145.13, DUE DATE:	08/14/2023		<a href="#">View</a>																																						



## Waive Late Fees (cont'd)

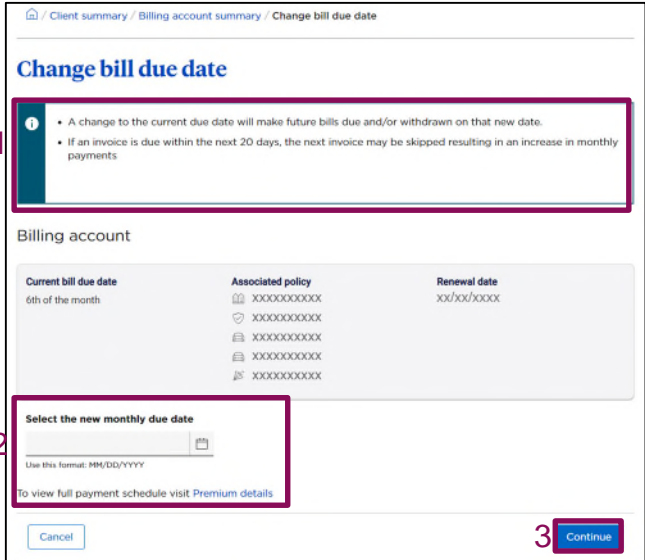
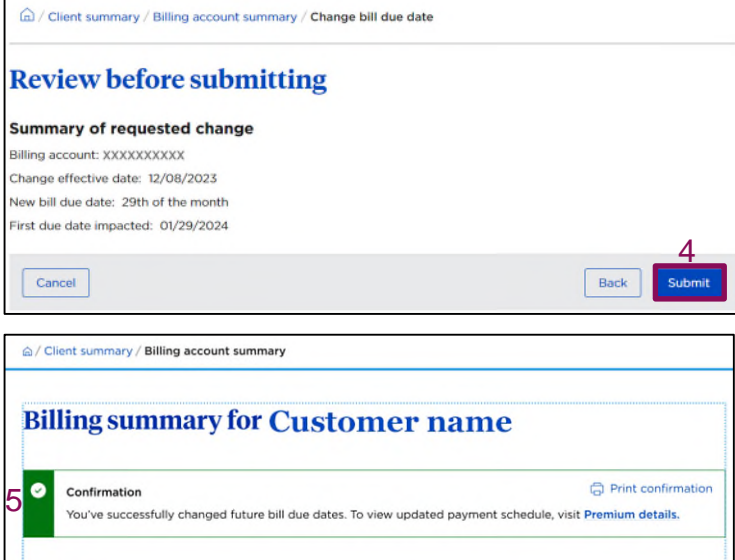
## Step 2

Action	Screen
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.	 <p>The screen displays a confirmation message: "Waive fee - Do you want to waive \$15.00 late fee charged on 11/11/2023?". At the bottom, there are two buttons: "Cancel" and "Submit". The "Submit" button is highlighted with a red box.</p>

## Manage Billing Account

## Change Due Date (Next Invoice Date)

## Steps 1-5

Action	Screen
<p>1. From the "Billing Account Summary," select the "Change due 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.</p> <p>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.</p> <p>3. Select "Continue"</p>	 <p>The screen shows the "Change bill due date" page. It includes a warning box with two points: "A change to the current due date will make future bills due and/or withdrawn on that new date." and "If an invoice is due within the next 20 days, the next invoice may be skipped resulting in an increase in monthly payments." Below this is a "Billing account" section with a table of policies. At the bottom, there is a "Select the new monthly due date" section with a date picker and a "Continue" button highlighted with a red box and the number 3.</p>
<p>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.</p> <p>5. A "Confirmation" message displays.</p>	 <p>The screen shows the "Review before submitting" page. It displays a "Summary of requested change" with details: "Billing account: XXXXXXXXXX", "Change effective date: 12/08/2023", "New bill due date: 29th of the month", and "First due date impacted: 01/29/2024". At the bottom, there are "Cancel", "Back", and "Submit" buttons. The "Submit" button is highlighted with a red box and the number 4.</p> <p>The next screen shows the "Billing summary for Customer name" page. It includes a "Confirmation" message: "You've successfully changed future bill due dates. To view updated payment schedule, visit Premium details." and a "Print confirmation" link. The "Confirmation" message is highlighted with a green box and the number 5.</p>



## Request Service Center Action

Action	Screen
<ol style="list-style-type: none"> <li>Use "Request Service Center Action" from "Billing Account Summary" if you need help to <b>"Transfer money to another billing account"</b> OR <b>"Apply money to policy balance"</b>. <ol style="list-style-type: none"> <li>Select the correct radio button for the action needed under "Select action".</li> <li>Select the billing account to transfer or apply money.</li> <li>Complete the dollar amount and effective date.</li> <li>Include "Additional Comments" as needed</li> <li>Select "Continue".</li> </ol> </li> <li>Review the "Summary of requested change". If you need to make changes, select the "Back" button.</li> <li>If everything is correct select the "Submit" button.</li> </ol> <p>Both options send an email to the PL Service Center for Processing to handle.</p>	<p><b>Billing account money transfer for account XXXXXXXXXX</b></p> <p>Request service center action <b>1</b></p> <p>Select action</p> <p><input checked="" type="radio"/> Transfer money to another billing account <b>a</b></p> <p><input type="radio"/> Apply money to policy balance</p> <p>Transfer to billing account</p> <p>Select billing account <b>b</b></p> <p>Amount to transfer <b>c</b></p> <p>Effective date <b>c</b></p> <p>Additional comments (optional) <b>d</b></p> <p>Cancel <b>e</b> Continue</p> <p><b>Review before submitting</b></p> <p><b>Summary of requested change</b></p> <p>Transfer to billing account: 7257022626</p> <p>Amount to transfer: \$250.00</p> <p>Effective date: 12/08/2023</p> <p>Comments:</p> <p>Cancel Back <b>3</b> Submit</p>

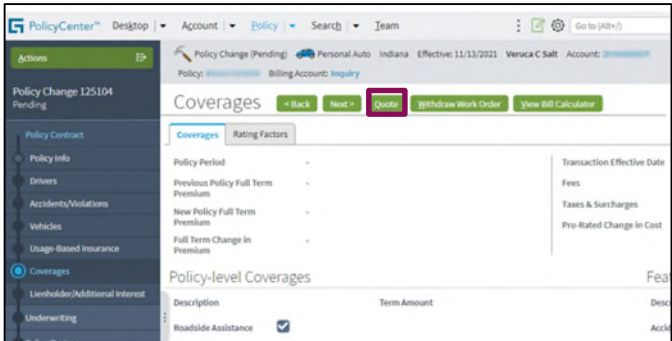
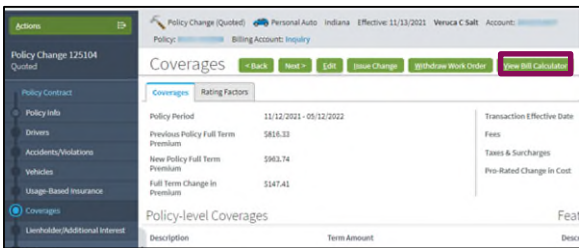
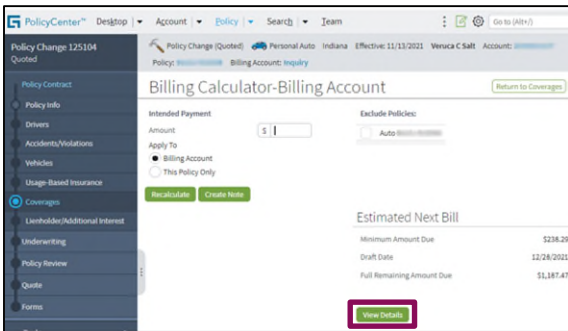
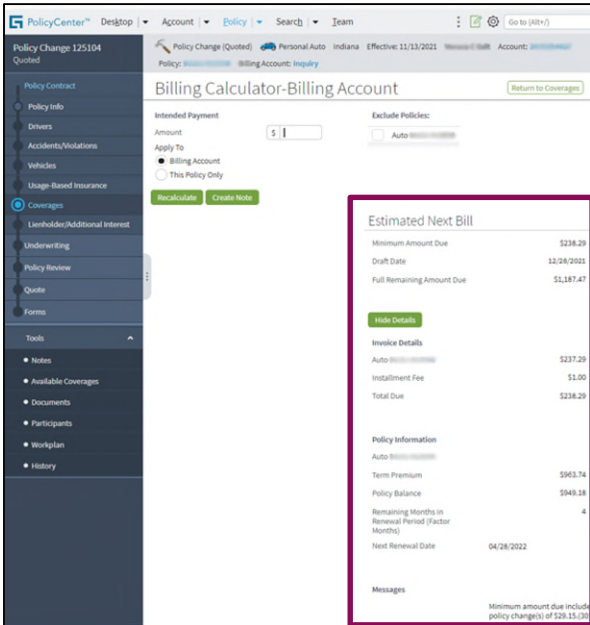
## View Premium Details

Action	Screen
<p>This screen displays when you select "View Premium Details". You can view current, future and past bills. Premium change amount displays.</p>	<p><b>Current bill</b> <b>1</b></p> <p>Current bill - November 30, 2023 - \$607.66</p> <p>Your current bill has not changed since the previous bill. Changes to your account since the previous bill include: You paid your premium in full. No payment is due. Your homeowner policy renewed on 11/30/2023.</p> <p><b>Amount breakdown</b></p> <p>Statement amount: \$607.66</p> <p>Received amount: \$12,331.89</p> <p>• Paid \$12,331.89 11/20/2023</p> <p>Balance due 11/30/2023: \$0.00</p> <p><b>Events impacting this bill</b></p> <p>Billing account XXXXXXXXXX</p> <p>HOMEOWNER XXXXXXXXXX</p> <p>Effective 11/30/2023</p> <p>• Your policy renewed.</p> <p>• <b>The Limit of Liability For Section I Coverage A Dwelling is Revised</b> - Your dwelling coverage amount has changed from \$825,934 to \$1,025,274. Dwelling coverage is the cost to rebuild your home, not the value of your home. Unrequested increases are due to the application of your policy's inflation protection. This feature helps to ensure that you have enough coverage to reconstruct your home as costs increase.</p> <p>• The Limit of Liability for Section I Coverage B Other Structures is revised.</p> <p>• The Limit of Liability for Section I Coverage C Personal Property is revised.</p> <p>• <b>General Rate Increase</b> - Your premium has changed because of general trends, not anything you did. <i>Nationwide® works to keep rates as low as possible while still protecting you against increased risk of loss.</i></p> <p>Homeowner policy XXXXXXXXXX</p> <p>Coverage period: 11/30/2023 - 11/30/2024</p> <p>Monthly installment: \$602.66</p> <p>Equity date: 11/09/2024</p> <p>Remaining balance for this coverage period: \$0.00</p> <p><b>Fees</b></p> <p>There are no fees on this bill.</p> <p><b>Future bills</b> <b>3</b></p> <p>Future bill - January 3, 2024 - \$340.08</p> <p>Future bill - February 3, 2024 - \$340.08</p> <p><b>Past bills</b> <b>4</b></p> <p>Past bill - November 3, 2023 - \$340.08</p> <p>Past bill - October 3, 2023 - \$318.71</p>



## Using the Billing Calculator

### Steps 1-4

Action	Screen
<p>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.</p> <p>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.</p> <ol style="list-style-type: none"> <li>After completing all changes on the policy, select the “Quote” button.</li> </ol>	
<ol style="list-style-type: none"> <li>When the policy is in “Quoted” status, select the “View Bill Calculator” button.</li> </ol>	
<ol style="list-style-type: none"> <li>On the “Billing Calculator-Billing Account” screen, select the “View Details” button.</li> </ol>	
<ol style="list-style-type: none"> <li>The “Estimated Next Bill” which includes “Invoice Details” and “Policy Information” displays for your review on the “Billing Calculator-Billing Account” screen.</li> </ol>	



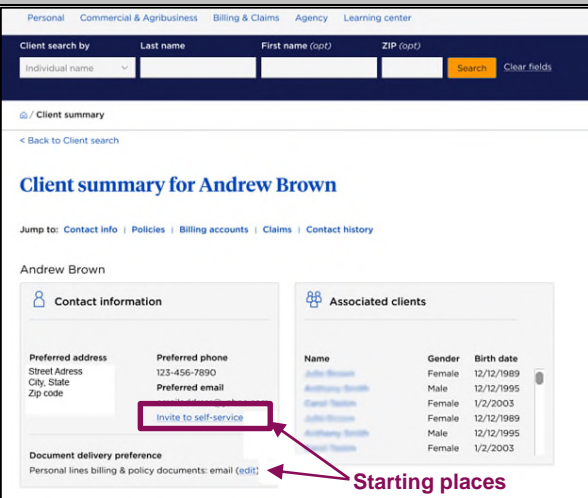
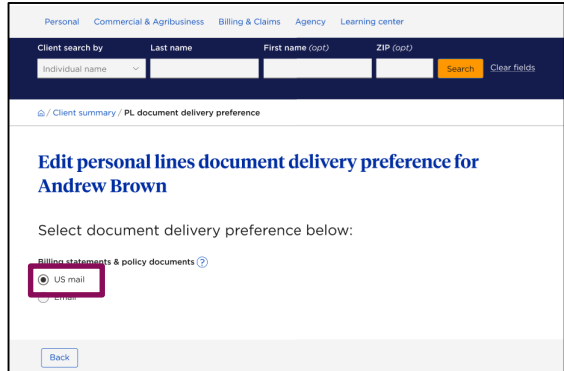
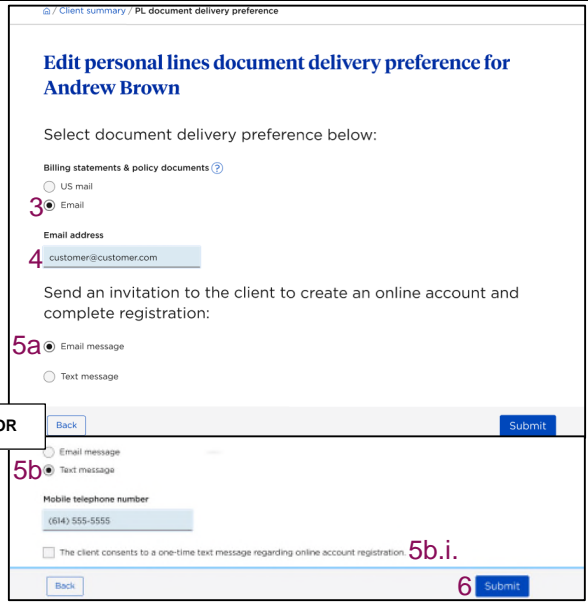
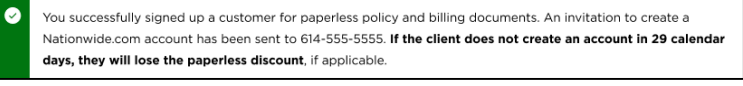




## Paperless Registration

## New Paperless Registration Not Registered on nationwide.com

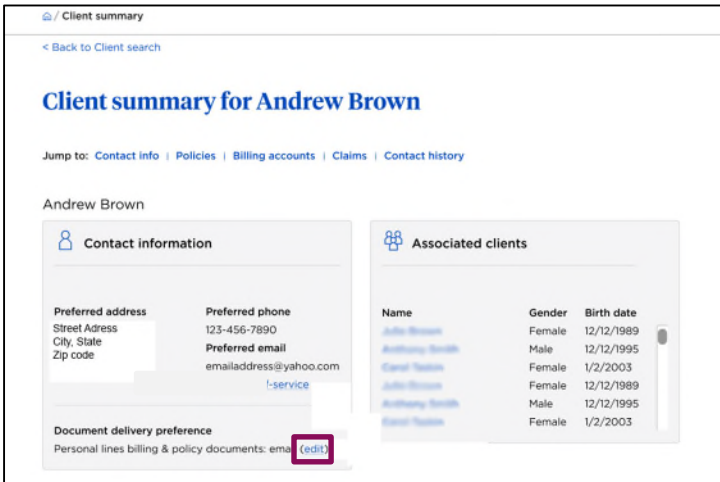
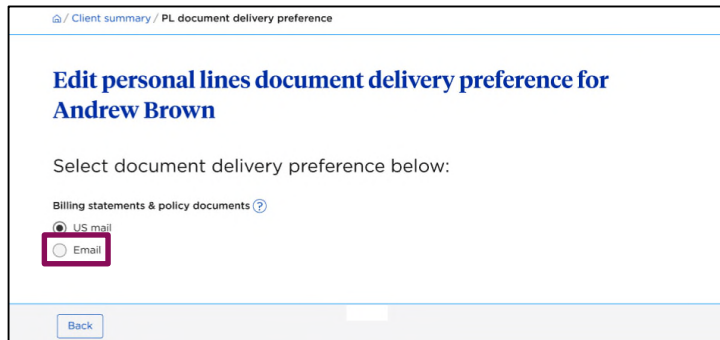
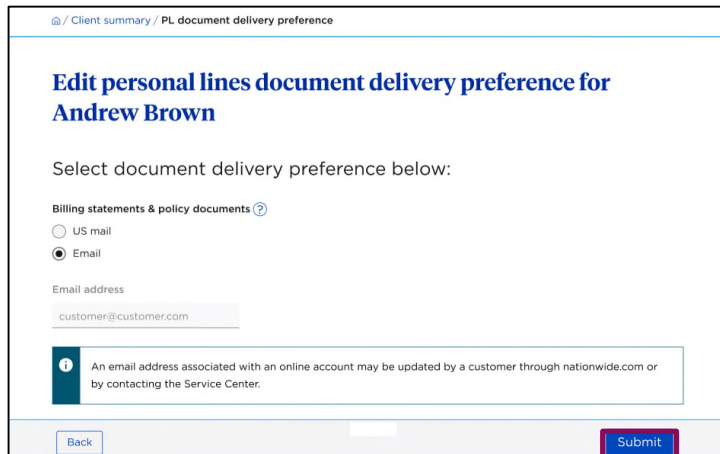
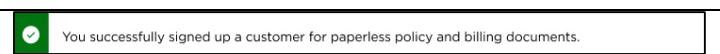
## Steps 1-7

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.	 <p>Starting places</p>
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”. 4. If there is an email on file, it will populate; if not, enter the customer’s email address. 5. If the customer wants the invitation to register and create an account sent via: a. <u>Email</u> – Select the “Email message” button; OR 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. 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: <div data-bbox="472 1759 719 1785" style="border: 1px solid black; padding: 2px; margin-top: 5px;"> Please confirm client consent. </div>	 <p>OR</p> <p>5b.i.</p> <p>6</p>
6. Select “Submit”.	
7. A confirmation message displays on the client summary screen.	



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

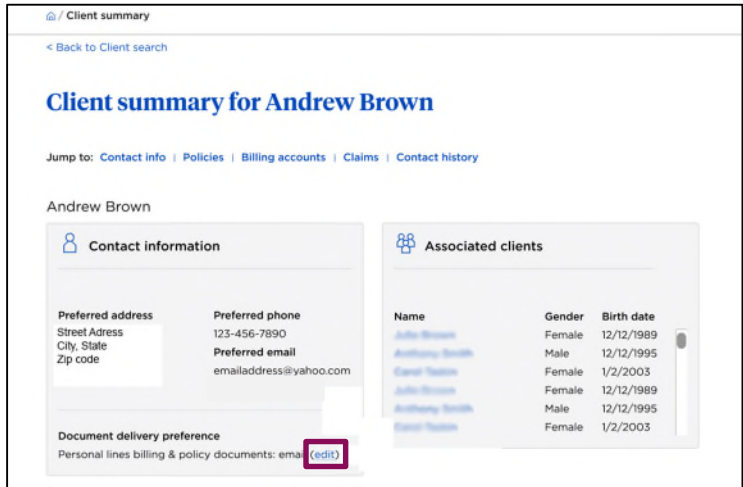
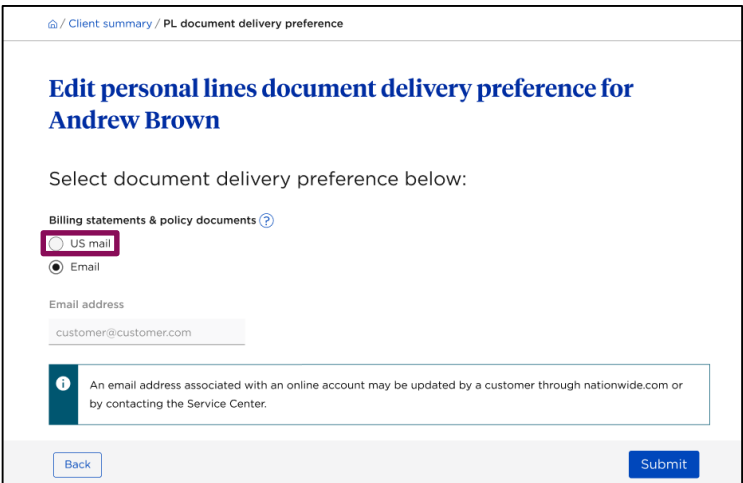
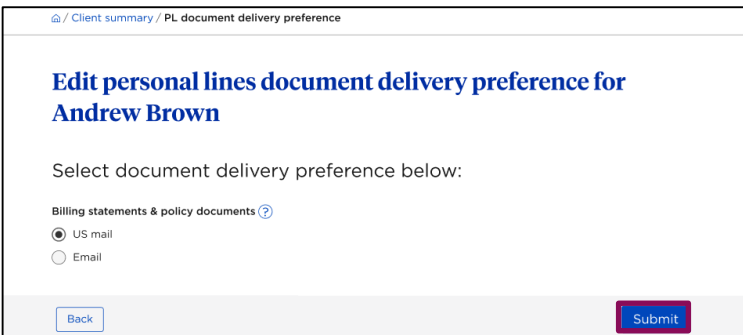
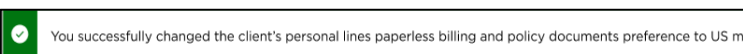
### Steps 1-4

Action	Screen
1. From Client summary, Contact information tile, select the “edit” link under “Document delivery preferences”.	 <p>The screenshot shows the 'Client summary' page for Andrew Brown. Under the 'Contact information' tile, the 'Document delivery preference' section shows 'Personal lines billing &amp; policy documents: email' with an '(edit)' link highlighted in a red box.</p>
2. The current preference displays. To change the document delivery preference, select the “Email” button.	 <p>The screenshot shows the 'Edit personal lines document delivery preference for Andrew Brown' page. Under 'Billing statements &amp; policy documents', the 'Email' radio button is selected and highlighted with a red box, while 'US mail' is unselected.</p>
3. The email address is not editable on this screen. Select “Submit”.	 <p>The screenshot shows the same 'Edit personal lines document delivery preference for Andrew Brown' page. The 'Email' radio button is now selected. The 'Email address' field is pre-filled with 'customer@customer.com'. A 'Submit' button is highlighted with a red box at the bottom right.</p>
4. A confirmation message displays.	 <p>The screenshot shows a green checkmark icon followed by the text: 'You successfully signed up a customer for paperless policy and billing documents.'</p>



## View/Update Existing Paperless Registration

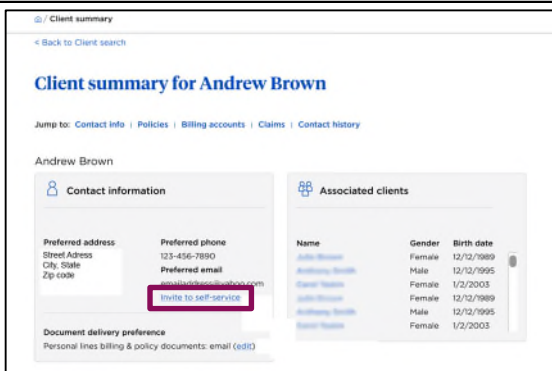
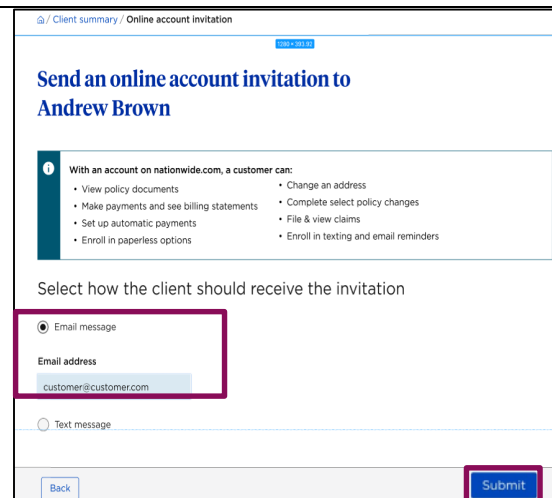
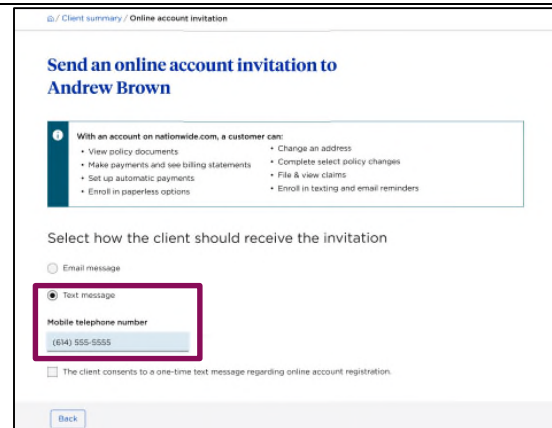
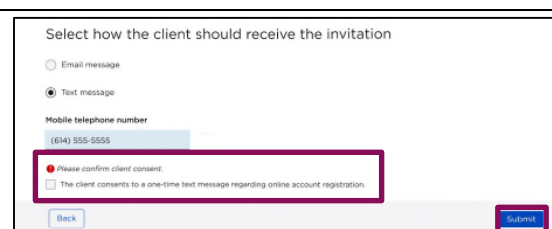

### Steps 1-4

Action	Screen
1. From Client summary, Contact information tile, select the “edit” link under “Document delivery preferences”.	
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.	
3. Select “Submit”.	
4. A confirmation message displays.	



## Online Registration Invitation

### Steps 1-7

Action	Screen
1. From Client summary, Contact information tile, select the “Invite to self-service” link.	
<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”.	
<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.	
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”.	
7. A confirmation message displays.	



## Update Insured Information

### Steps 1-4

Action	Screen
<ol style="list-style-type: none"> <li>From “Billing Account Summary”, select the “Update” link in the “Insured Information Update” section.</li> <li>Make changes to the billing account holder information.</li> <li>Select “Continue”.</li> <li>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.</li> </ol> <p><b>NOTE:</b> Changing the billing address does not update the policy address. Complete a policy amendment to change policy information, including third party or mortgagee addresses.</p>	

## Warnings & Notices

### Steps 1-3

Action	Screen
<ol style="list-style-type: none"> <li>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.</li> <li>You can see reinstatement information on this screen as well.</li> </ol>	
<ol style="list-style-type: none"> <li>After a period of time the warnings and notices will deactivate, but you will still see details in the “Billing Account History”.</li> </ol>	

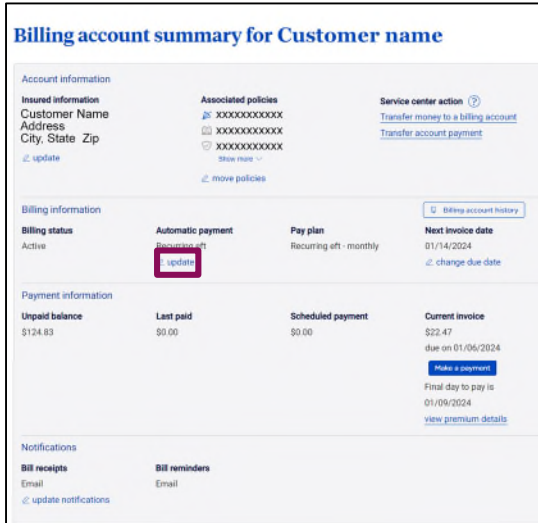
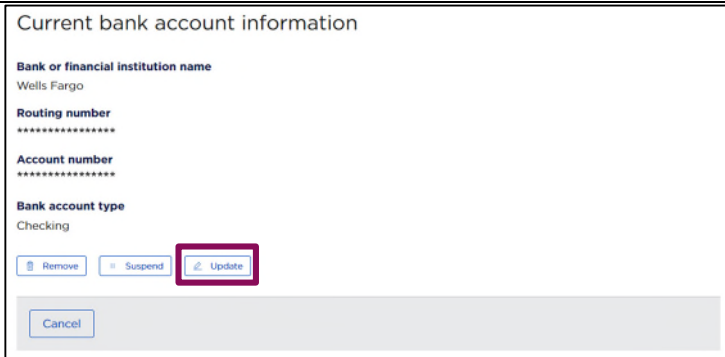
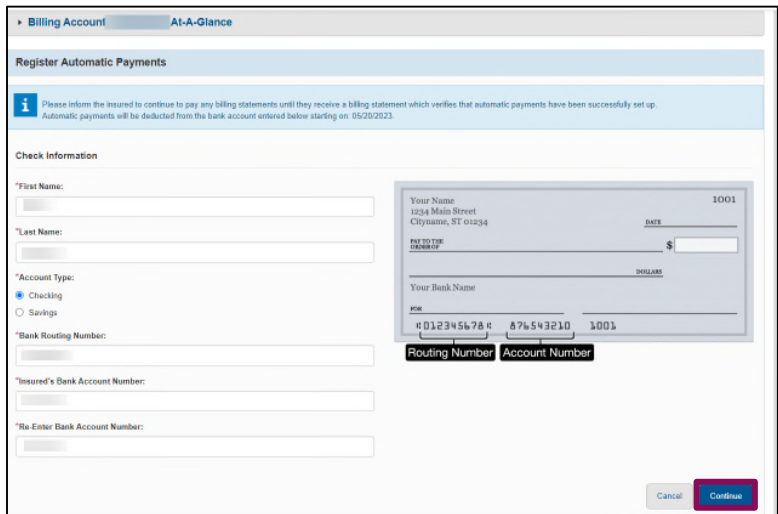




## Reprint Important Documents

## Reprint EFT Authorization Form

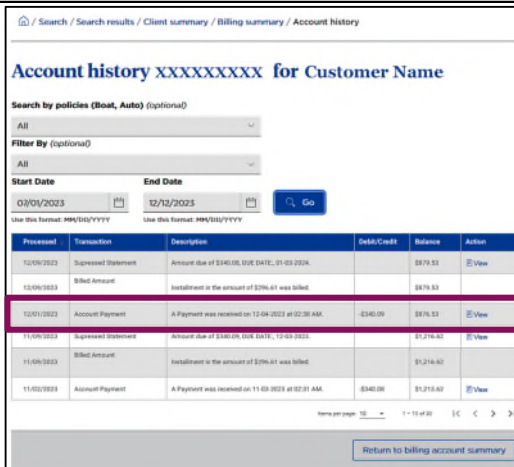
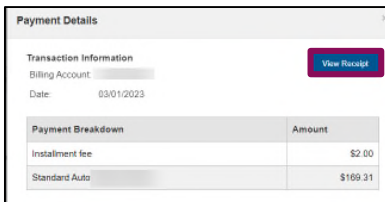
## Steps 1- 3

Action	Screen
<p>Here is a workaround to reprint an EFT Authorization Form.</p> <ol style="list-style-type: none"> <li>Select the “update” link in Automatic Payments on the Billing Account Summary screen.</li> </ol>	 <p>The screenshot shows the 'Billing account summary for Customer name' page. Under the 'Automatic payment' section, the 'update' link is highlighted with a red box.</p>
<ol style="list-style-type: none"> <li>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.</li> </ol>	 <p>The screenshot shows the 'Current bank account information' page. Under the 'Bank account type' section, the 'Update' button is highlighted with a red box.</p>
<ol style="list-style-type: none"> <li>Select “Continue” to get the authorization form.</li> </ol>	 <p>The screenshot shows the 'Register Automatic Payments' page. It includes a 'Check Information' section with fields for First Name, Last Name, Account Type (Checking is selected), Bank Routing Number, Insured's Bank Account Number, and Re-Enter Bank Account Number. A preview of the authorization form is shown on the right, with the Routing Number and Account Number highlighted. The 'Continue' button is highlighted with a red box.</p>



## 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.	
3. The receipt appears on the screen. Select the "Print" button to reprint the receipt.	