

EZPay Process

American Modern is focused on obtaining updated EZPay Forms that connect to a traceability database. This will allow a seamless conversion from modernLINK to AMsuite for existing EZPay customers, and ensures EZPay customers do not lapse in EZPay automatic payments. The process for AMsuite and modernLINK is outlined in this job-aid.

AMsuite new business

Dwelling Special - Quote (0000031775)
Polly Holder
Click the Named Insured above to access mailing/account address

[Print Binder](#)

Payment Details

Total Annual Premium:
\$1,548.00

Billing

| | |
|----------------------|----------------------|
| Billing Method * | Direct Bill |
| Renew Method * | Direct Bill |
| Billing Type * | Recurring Electronic |
| Date of Payment * | 2 |
| Bill To * | Polly Holder |
| EZPay form signed? * | No |
| EZPay form version * | |

When issuing new business, the system defaults to Recurring Electronic. Policies on EFT have a better retention rate.

If customer elects to E-Sign then completed authorization forms will be automatically uploaded to the system. If they elect Traditional Signature, follow the steps below.

You may either print the documents requiring signature now or after issuance. If you print now, you must write the policy number on the form(s) when a number gets assigned at issuance. Coverage is not bound until a policy has been issued.
 To print now, use the button below, print locally, issue the policy, fill in the policy number by hand, and collect the signature(s).
 To print after issuance, issue the policy, go to the Documents page of the issued policy, select which documents to print, print locally, and collect the signature(s).
 Retain signed copies of documents, or scan and attach them to the policy.

[View/Print All](#)

| | FORM # | DESCRIPTION |
|----------------------------|--------------|------------------------------------|
| View/Print | DW-CW-O-0001 | Dwelling Application |
| View/Print | EFT AUTH | EZPay Enrollment and Authorization |

The system directs the user to attach the signed EZPay Form that is obtained from the view/print button.

[Attach Signed EZPay Form](#)

[Cancel](#)
[Previous](#)
[Buy Now](#)

EZPay Process

Manufactured Home - Quote (0000000776)

Polly Holder

Click the Named Insured above to access mailing/account address

Attention! Documents containing unmasked credit card numbers or sensitive nonpublic personal information (NPPI), such as a social security number should not be uploaded to the policy. Company guidelines prohibit such information being accessed or displayed. These documents must be securely retained in your office. All other documents must be uploaded to the policy file. Failure to comply could result in a breach of contract. Maximum of 50 documents displayed. To find specific documents, click the Summary tile to view AMsuite Core and search on the Documents page to view more.

Documents Please be aware that the file name as it is stored on your computer will display as the document Name as you may want to change the file name (e.g. unit 1 photograph) before uploading.

Type

Form Name *

EZ Pay Form Version *

Choose EZPay form version. Form revision date can be found on the bottom of the form.

If user tries to attach a form with the 10-15 version date selected, a warning message in bold red font shall display: 'Action Required: This form version is no longer valid.' Please provide your insured with their activation code located on the Billing page and refer them to www.amig.com/mypolicy to complete a new EZPay authorization form.'

Note: Only forms with revision dates of 05-18, 02-19 and RE04-19 are current and acceptable.

EZPay Process

Account: Polly Holder
 Manufactured Home (990001621) In Force

SUMMARY CONTACTS VIEW/ADD ACTIVITIES VIEW/ADD NOTES **VIEW/UPLOAD DOCUMENTS** BILLING / MAKE PAYMENT

Attention! Documents containing unmasked credit card numbers or sensitive nonpublic personal information (NPPI), such as a social security number should not be uploaded to the policy. Company guidelines prohibit such information being accessed or displayed. These documents must be securely retained in your office. All other documents must be uploaded to the policy file. Failure to comply could result in a breach of contract. Maximum of 50 documents displayed. To find specific documents, click the Summary tile to view AMSuite Core and search on the Documents page to view more.

Documents Please be aware that the file name as it is stored on your computer will display as the document Name as you may want to change the file name (e.g. unit 1 photograph) before uploading. + Upload Documents

When the policy is issued, the EZPay form can be viewed on the View/Upload Documents page.

| Description | Type | Author | Date Uploaded |
|-----------------------------|--------------------------|-------------|---------------|
| EZ Pay Form | EZPay Authorization Form | autotester2 | 6/2/19 |

AMsuite existing business

Account: Julia EZPay
 Tenant (990001620) In Force

SUMMARY CONTACTS VIEW/ADD ACTIVITIES VIEW/ADD NOTES VIEW/UPLOAD DOCUMENTS BILLING / MAKE PAYMENT

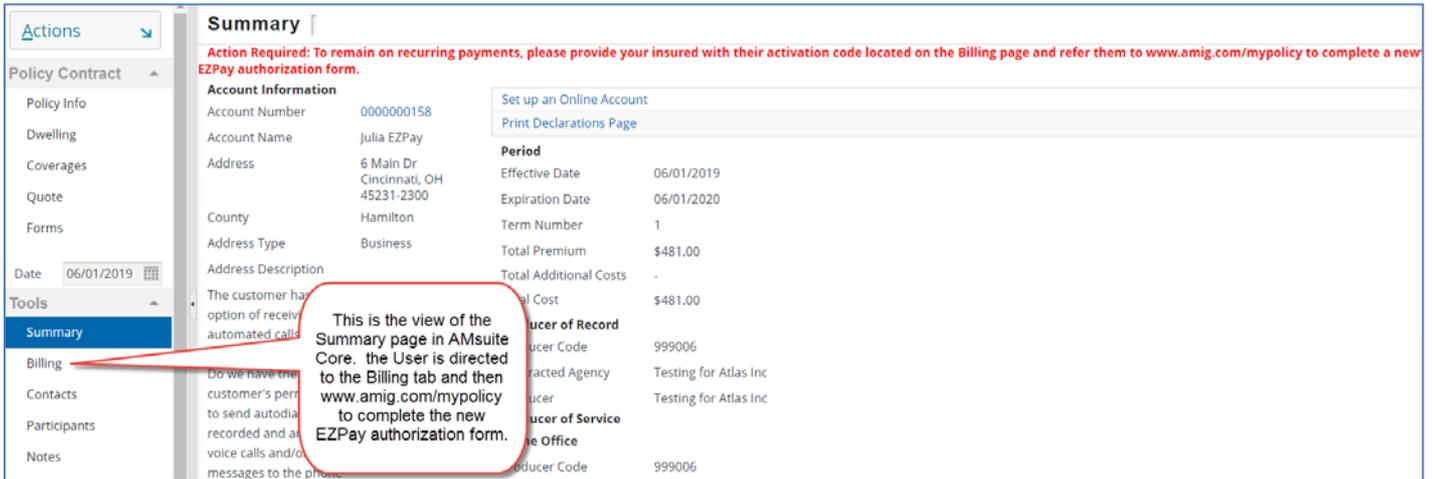
Change Policy Cancel Policy >AMsuite Core Set Up An Online Account

DECLARATION PAGE APPLICATION (unsigned version)
 Action Required: To remain on recurring payments, please provide your insured with their activation code located on the Billing page and refer them to www.amig.com/mypolicy to complete a new EZPay authorization form.

The message below will appear when the existing policy does not have the correct EZPay form version on file. Click on Billing/Make Payment tile.

EZPay Process

AMsuite Core-existing policies

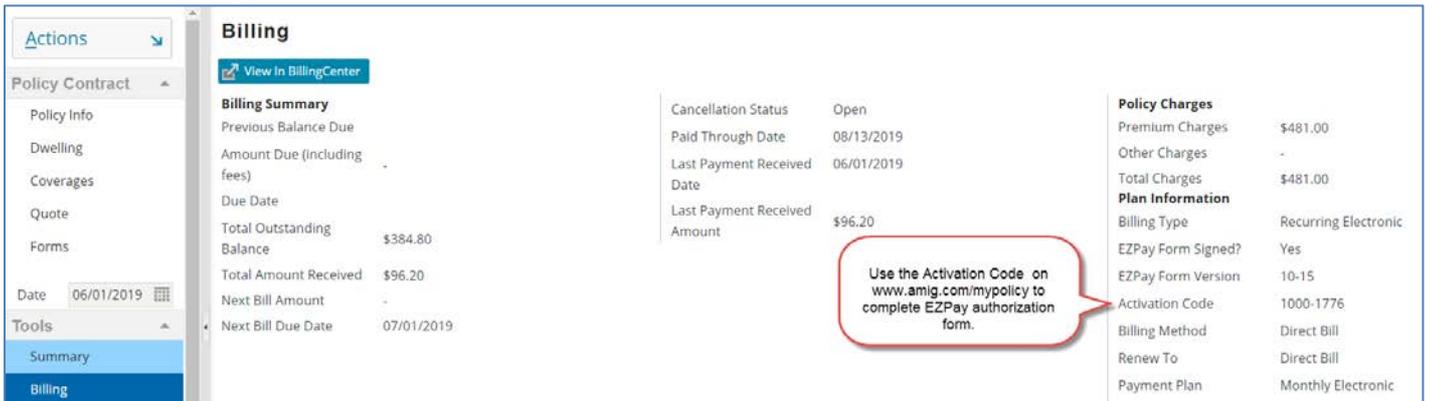


Summary

Action Required: To remain on recurring payments, please provide your insured with their activation code located on the Billing page and refer them to www.amig.com/mypolicy to complete a new EZPay authorization form.

Account Information

| | | | |
|---------------------|---|----------------------------|-----------------------|
| Account Number | 0000000158 | Set up an Online Account | |
| Account Name | Julia EZPay | Print Declarations Page | |
| Address | 6 Main Dr Cincinnati, OH 45231-2300 | Period | |
| County | Hamilton | Effective Date | 06/01/2019 |
| Address Type | Business | Expiration Date | 06/01/2020 |
| Address Description | The customer has the option of receiving automated calls | Term Number | 1 |
| | Do we have the customer's permission to send automated recorded and answered voice calls and/or messages to the producer? | Total Premium | \$481.00 |
| | | Total Additional Costs | - |
| | | Total Cost | \$481.00 |
| | | Producer of Record | |
| | | Producer Code | 999006 |
| | | Contracted Agency | Testing for Atlas Inc |
| | | Producer | Testing for Atlas Inc |
| | | Producer of Service | |
| | | Producer Office | |
| | | Producer Code | 999006 |



Billing

[View In BillingCenter](#)

Billing Summary

| | |
|-----------------------------|------------|
| Previous Balance Due | |
| Amount Due (including fees) | |
| Due Date | |
| Total Outstanding Balance | \$384.80 |
| Total Amount Received | \$96.20 |
| Next Bill Amount | - |
| Next Bill Due Date | 07/01/2019 |

Cancellation Status: Open

Paid Through Date: 08/13/2019

Last Payment Received Date: 06/01/2019

Last Payment Received Amount: \$96.20

Policy Charges

| | |
|-----------------|----------|
| Premium Charges | \$481.00 |
| Other Charges | - |
| Total Charges | \$481.00 |

Plan Information

| | |
|--------------------|----------------------|
| Billing Type | Recurring Electronic |
| EZPay Form Signed? | Yes |
| EZPay Form Version | 10-15 |
| Activation Code | 1000-1776 |
| Billing Method | Direct Bill |
| Renew To | Direct Bill |
| Payment Plan | Monthly Electronic |

EZPay Process

modernLINK Motorcycle & Collector Vehicle

Policy Information **Billing** History Diaries & Memos Policy Actions Attachments

Billing Details Transaction History Installment Schedule

Billing Client

Billing Client Name Julia MC-Ezpay
 Billing Client Address 100 5th Ave Pine Bluff, AR 71601

Payment

| | | | |
|-------------------------------|------------|------------------------|------------------------|
| Amount Due Now(Incl. Charges) | \$0.00 | Pending Payment | Yes |
| Due Date | | Last Payment Amount | \$0.00 |
| Equity Calculation | \$7.30 | Last Payment Rec. Date | |
| Next Bill Amount | \$13.60 | Receipt Number | 0 |
| Next Bill Due Date | 06/18/2019 | Bill Plan | MONTHLY PAY ELECTRONIC |
| Remaining Installments | 9 | Collection Method | Credit Card |
| | | EZPay Form Signed? | YES |
| | | EZPay Form Version | 02-19 |
| | | EZPay Activation Code | 1000-1610 |

Premium

EZPay Activation Code-found on the Billing tab.

Policy Information **Billing** History Diaries & Memos Policy Actions **Attachments**

Existing Attachments

Show Attachment History

| Description | User Name | Date | Status | Action |
|--------------------------------|-----------|------------|----------|---|
| EZPay Authorization Form 05-18 | A Tester | 03/08/2019 | Attached | View Remove |

Note: If you recently attached documents and they do not appear above, please click "Refresh" to update the list. This process may take several minutes.
 For more information on the required documentation to attach or retain, refer to Diaries and Memos.

New Attachments

Select files from your computer. Files need to be 15mb or less and one of the following types: .pdf, .jpg, .doc, .tif, .bmp, .txt, .xls, .docx, .xlsx and .png. Please ensure there are no spaces in the file names.

File Name * Choose File No file chosen

Description *

Choose EZPay Authorization Form from the drop down on the Attachments tab.

+ Add Another Attachment

Upload Files Cancel

Policy Information **Billing** History Diaries & Memos Policy Actions **Attachments**

Existing Attachments

Show Attachment History

| Description | User Name | Date | Status | Action |
|--------------------------------|-----------|------------|----------|---|
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File Name * Choose File No file chosen

Description * EZPay Authorization Form

EZPay Form Version * 05-18

Choose form version. Form date can be found on the bottom of the EZPay Authorization form. Click Upload Files.

+ Add Another Attachment

Upload Files Cancel

EZPay Process

modernLINK Dwelling and Manufactured Home

In modernLINK, prior to issuance, the EZPay form is obtained from the Print icon located on the olive colored bar at the top of the summary page. The policy must be issued before the EZPay form can be uploaded. It is uploaded on the Summary page.

Save Print Submit Delete Decline

Your calculated total premium is \$ 2422.00

This quote does not represent bound coverage and is subject to underwriting approval.

Note: When using a mouse, please select the desired dropdown option and click the mouse icon  at the end of each line.

| Billing Info | ? |
|---|--|
| <u>Policy Term:</u> | 12 Months |
| <u>Agent Billing Option:</u> | Direct Bill |
| <u>Payment Plan:</u> | EZPAY(EFT)/Monthly  |
| <u>Minimum Down Payment (includes service charge, if applicable):</u> | 404.66 |
| <u>Down Payment Method:</u> | EFT Down Payment  |
| <u>Payment Amount Received:</u> | 404.66 |
| <u>Down Payment Paid By:</u> | Insured |
| <u>EZPay(EFT) Bank ABA Number:</u> | 123123123 |
| <u>EZPay(EFT) Account Number:</u> | 123456 |
| <u>EZPay(EFT) Account Type:</u> | Checking |
| <u>EZPay(EFT) Date of Month (01-28):</u> | 06 |
| <u>Send all remaining bills to:</u> | Insured |
| <u>Send renewal bills to:</u> | Insured |

EZPay Process

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Print
Policy Copy Request
Add Memo
Upload Signed EZPay Form

Action Required: To remain on recurring payments, please provide your insured with their activation code and refer them to www.amig.com/mypolicy to complete a new EZPay authorization form.

Policyholder Info

| | » Request Change ? |
|----------------------|--------------------|
| Company Name: | G. U. I. C. |
| Policy Number: | 0047307141 |
| Policy Status: | Inforce |
| Entered Date: | 08/27/18 |
| User ID: | T60 |
| Policyholder's Name: | Jorge Vega |

Current Billing

| | » Request Change History ? |
|--------------------|----------------------------|
| Activation Code: | 1000 1780 |
| Date Due: | |
| Amount Due Now: | |
| Service Charge: | \$0.00 |
| Other Charges: | |
| Total Outstanding: | \$166.70 |

