eCheck Payment Processing Overview

This overview assists you in facilitating a payment from a policyholder by drafting their bank account.

Policyholder on the Phone

Review TEL Guidelines

Reference for details

Complete TEL ACH Debit Auth

Print, sign and retain for your records

Email Federal ESIGN Disclosure

Obtain policyholder consent

Complete TEL Auth Notice

Email or mail to policyholder

Policyholder in the Office

Review PPD Guidelines

Reference for details

Complete Consumer Auth for ACH Debit

Policyholder signs and agent retains for records

For additional information, refer to the eCheck Payment Processing Guide.

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