Making Payments in the New Agent Portal

This job aid demonstrates the payment methods in the New Agent Portal.

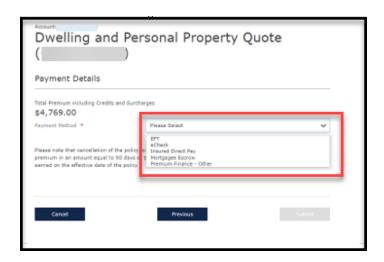
PAYMENT OPTIONS SUMMARY

Payment Methods	Funding Source	Amount Paid
EFT (only if agency is enrolled)	Uses the Agency's Banking Information to pay the premium. New for 11-2022 USING EFT PAYMENT METHOD FOR POLICYHOLDER'S DOWN PAYMENT ON A TWIA PAYMENT PLAN	As of 11-2022, agents may make the down payment for policyholders on all available TWIA payment plans.
eCheck	Uses the Insured's Routing and Account Numbers to make the payment. New for 11-2022 USING eCHECK PAYMENT METHOD FOR POLICYHOLDER'S DOWN PAYMENT ON A TWIA PAYMENT PLAN	Payment Plans Available— As of 11-2022, agents may pay the down payment for the policyholder on all available TWIA payment plans.
Insured Direct Pay	See Job Aid for Policyholder: Making-Payments-in- TWIA-Policyholder-Portal.pdf for more information.	Payment Plans Available
Mortgagee Escrow	Funds paid by Mortgagee out of Escrow Account. For the first year, it is up to the agent to bill the mortgage company and collect the payment. At renewal, any mortgagee on file will automatically be sent a renewal offer (billing info included) 35 days before the policy's renewal date.	100% of Premium due at inception. If anything less is received, it will be returned.
Premium Finance- Other	Premium Finance Company pays 75% of the premium and the Insured pays 25% of premium + any waiver surcharge on the policy. Any partial payments sent in will be returned. The insured's down payment and the premium finance company's draft need to come in together.	100% of Premium Due at inception; anything less than 100% paid will be returned.

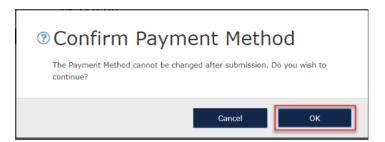


GENERAL STEPS FOR ALL PAYMENT METHODS

1. On the Payment Details screen, click the drop-down arrow to see the available payment methods (see red box below). Note: EFT will not show as payment option unless your agency is enrolled in the plan.



2. You will be asked to confirm your payment method and warned you will be unable to switch the method once submitted. Select "OK" when ready.



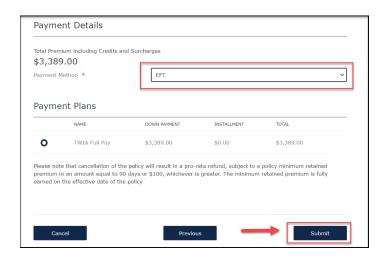
3. Last, you will see the Submission Successful message.





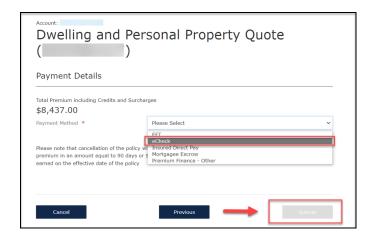
EFT PAYMENT METHOD

1. Select "EFT" and then select "Submit." In this example, TWIA Full Pay is shown. Next you will see a "Confirm Payment" notice followed by a "Submission Successful" screen.



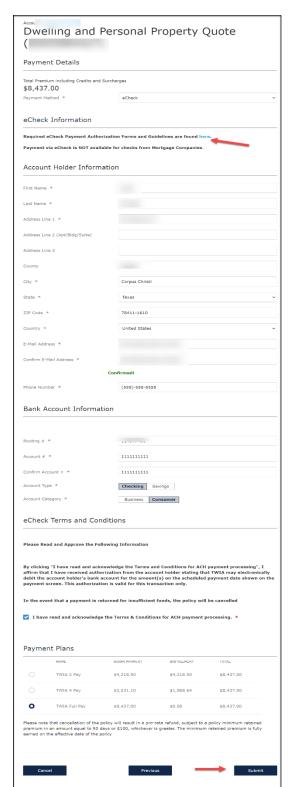
eCHECK PAYMENT METHOD

1. Select "eCheck" and then select "Submit."



2. Fill in all fields with an *asterisk and choose the payment plan. After all required fields have been completed, select "Submit." Please note: you will also need to confirm the email address where indicated in order to proceed. Next you will see a "Confirm Payment" notice followed by a "Submission Successful" screen.



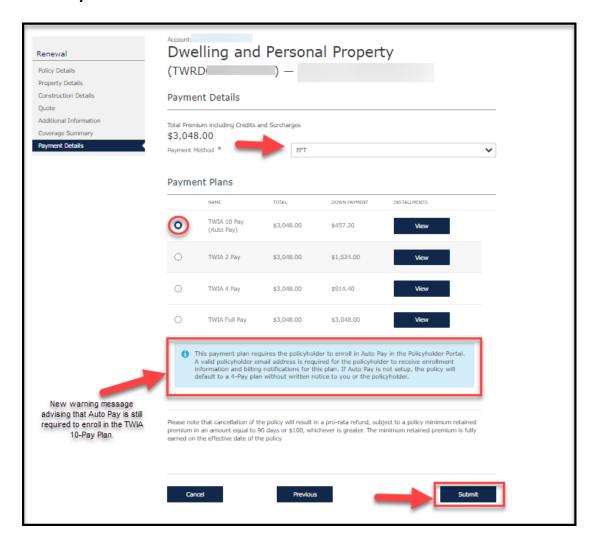


New for 11-2022 USING EFT OR eCHECK

PAYMENT METHOD FOR POLICYHOLDER'S DOWN PAYMENT ON A TWIA PAYMENT PLAN

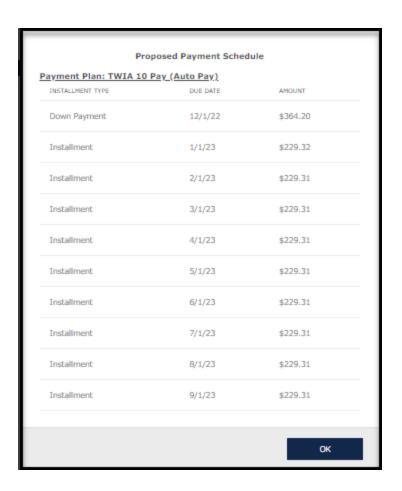


If you would like to make the first installment payment on behalf of the policyholder, you may use either EFT or eCheck to do so. The example below shows making an initial payment via EFT for the 10-Pay Plan. The policyholder will still need to enroll in Auto Pay to use the 10-Pay plan. Be sure to provide a valid policyholder email address (they will be sent a link directly) so they can set up their Auto Pay though the TWIA Policyholder Portal.





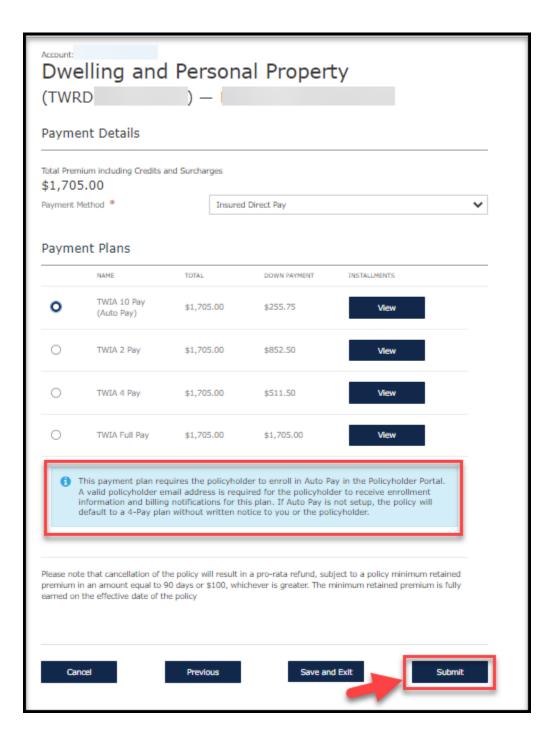
^{*****}Also new is the ability to see the proposed payment plan for each option. If you click "View" on the 10-Pay Plan, you will see:



INSURED DIRECT PAY PAYMENT METHOD

1. Select "Insured Direct Pay" from the drop-down menu, choose a payment plan and then select "Submit." You will then see a "Confirm Payment" notice followed by a "Submission Successful" screen. ***Please note as of 11-2022 agents may directly enroll in policyholders in the TWIA 10 Pay Plan. The policyholder may also select any of the payment plans when they log in to the policyholder portal; your choice does not lock them in.

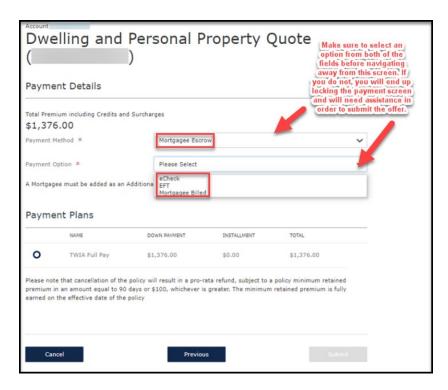




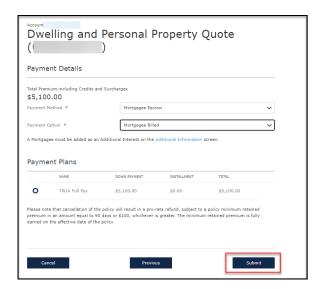


MORTGAGEE ESCROW PAYMENT METHOD

Select Mortgagee Escrow, then you may select from three available payment
options. ***Please note: for new business submissions, it is still up to the agent to
invoice and collect the premium from any mortgagee on file. The process will be
automated starting with the first renewal. Renewal offers are sent to any
mortgagee on file 35 days before the policy's renewal date.



2. In this case, Mortgagee Billed was selected. Once submitted, you will see the payment confirmation notice followed by the successful submission screen.

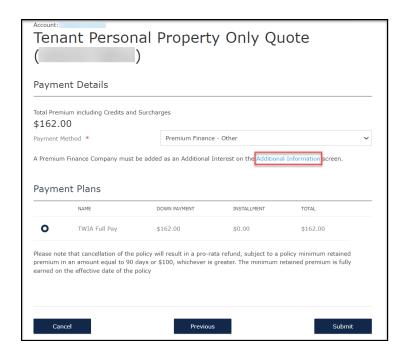




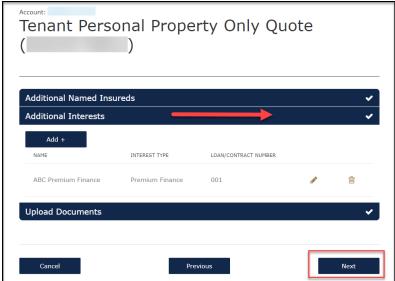
PREMIUM FINANCE PAYMENT METHOD

1. Select "Premium Finance Other" and then "Submit."

Please note: If a premium finance company is not listed on the submission, you will see the "Additional Information" link on the screen. Select the link to add the Premium Finance Company to the submission. You will not be able to submit the Premium Finance- Other payment method if a premium finance company is not listed on the submission.



2. Add the Premium Finance information in the Additional Interests Section. Once added, select "Next."





3. Navigate through the submission screens until you return to the Payment Details page. When ready, select "Submit." You will see the payment confirmation notice followed by the successful submission screen.

