



Making Payments in the Agent Portal

This job aid demonstrates the Payment Methods and steps to make payments in the Agent Portal.

Prerequisite logging in to the Agent Portal.

Payment Methods Summary

The Payment Methods appear in the Agent Portal depending on the Policy type that is being quoted.

- Rental Properties will not display Mortgagee Escrow as it is not owned.
- All Payment Methods appear if the Policyholder owns the property.

View Payment information [HERE](#).

Payment Methods	Funding Source	Amount Paid
EFT (only if Agency is enrolled)	Uses the Agency's banking information to pay the premium.	Payment Plans Available
eCheck	Uses the Insured's Routing and Account numbers to make the payment.	Payment Plans Available
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.



1. On the Payment Details screen, click the drop down menu to view and select from the available payment methods.

NOTE: EFT will not show as a payment option unless the Agency is enrolled in the plan.

2. Confirm the **Payment Method** from the drop down menu.

Quote Request

Account: Jane

Tenant Personal Property Only Quote ([REDACTED])

Payment Details

Total Premium including Credits And Surcharges
\$100.00

* Payment Method

Policyholder Email Address

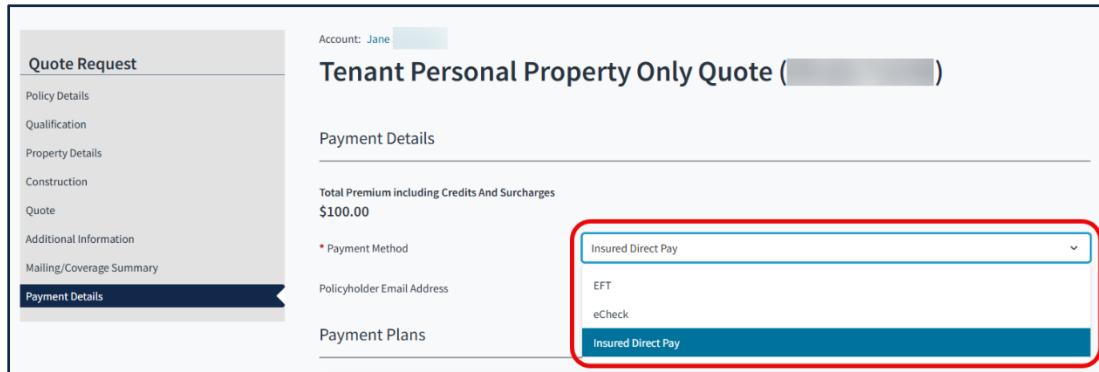
Payment Plans

Insured Direct Pay

EFT

eCheck

Insured Direct Pay



3. After selected, confirm the email address for the Policyholder and proceed to appropriate **Payment Plan**. Click **Submit**.

Important! A valid email must be on file for the Policyholder to access the portal for their policy (once established).

Quote Request

Account: Jane

Tenant Personal Property Only Quote ([REDACTED])

Payment Details

Total Premium including Credits And Surcharges
\$100.00

* Payment Method

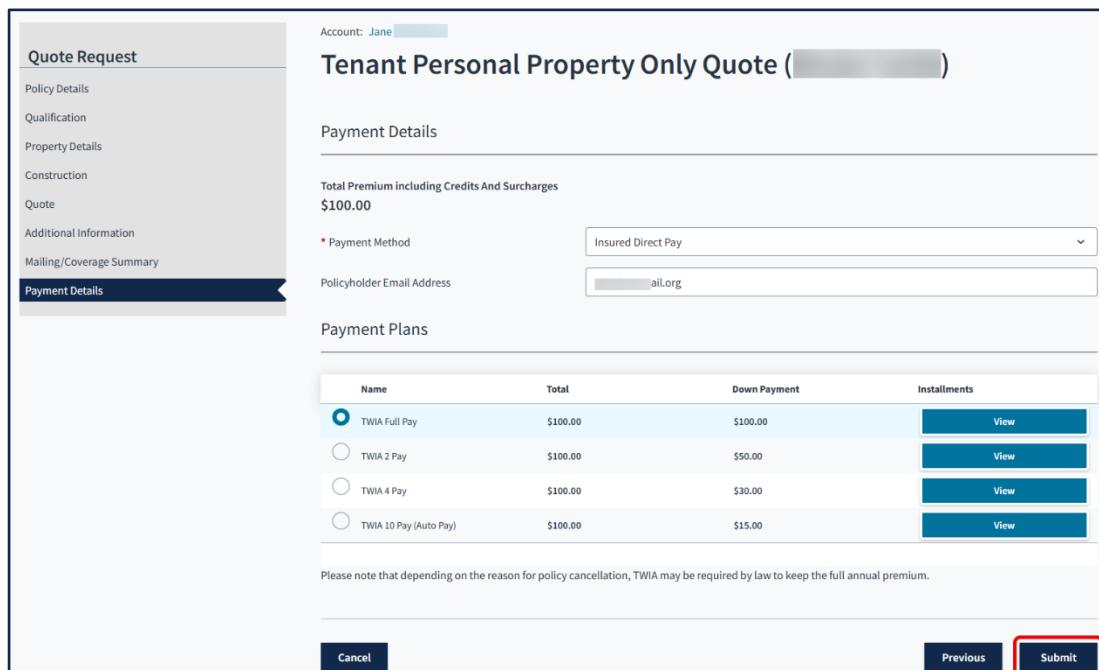
Policyholder Email Address
[REDACTED]@il.org

Payment Plans

Name	Total	Down Payment	Installments
<input checked="" type="radio"/> TWIA Full Pay	\$100.00	\$100.00	View
<input type="radio"/> TWIA 2 Pay	\$100.00	\$50.00	View
<input type="radio"/> TWIA 4 Pay	\$100.00	\$30.00	View
<input type="radio"/> TWIA 10 Pay (Auto Pay)	\$100.00	\$15.00	View

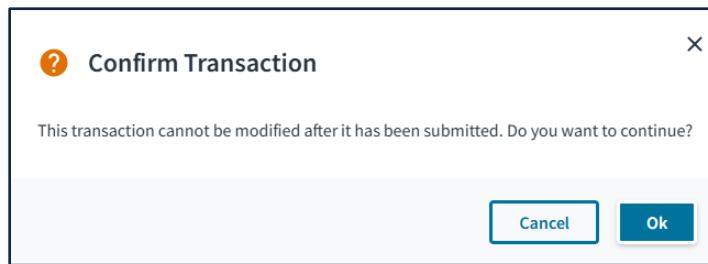
Please note that depending on the reason for policy cancellation, TWIA may be required by law to keep the full annual premium.

[Cancel](#) [Previous](#) [Submit](#)





4. Confirm the Transaction by clicking **Ok**.



Important! Once the Transaction is confirmed, it cannot be changed.

5. Review the **Submission Successful** page. A view of the policy is available by clicking the hyperlink labeled **here**.

A screenshot of the "Submission Successful" page. The page header says "Submission Successful". Below it, a message states: "TWIA has received this application. Coverage will be bound and a policy issued upon TWIA's receipt of payment. The applicant will receive an email with instructions on how to make a payment, if needed. This offer will expire in 30 days." A link "Click [here](#) to review and download the following documents:" is shown, with "here" highlighted in red. A list of documents follows: "Offer Letter and Payment Coupon" and "Application". The "Summary" section lists application details: Offer Number (redacted), Requested Coverage Start Date (redacted), Proposed Policy Period (redacted), Total Premium including Credits And Surcharges (\$100.00), Payment Method (Insured Direct Pay), and Payment Plan (TWIA Full Pay). The "Primary Insured" section is listed but contains no visible information.