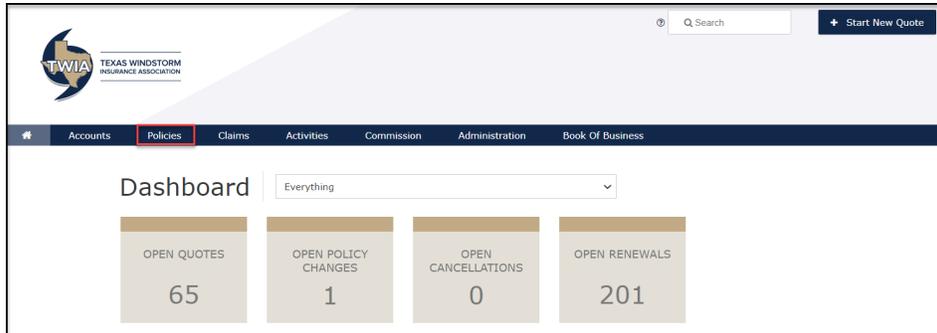


Using the Billing Functions in the TWIA Agent Portal

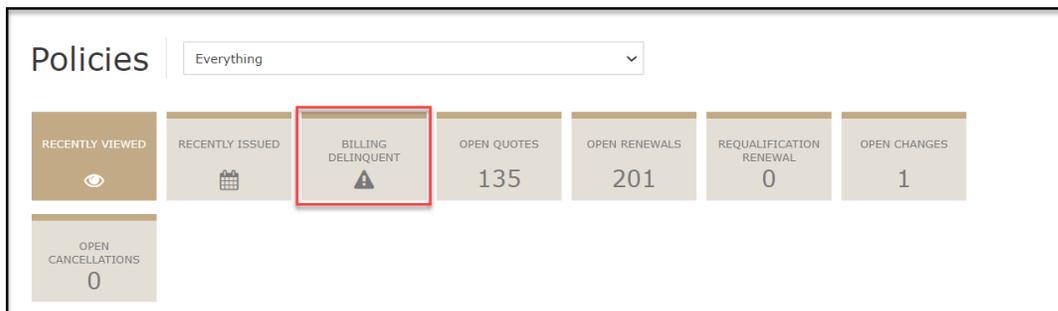
This job aid demonstrates the steps needed to use the Billing Delinquent tab and the Billing tab to see the policyholder's billing status and payment schedule.

Part I---Using the Billing Delinquent Tab

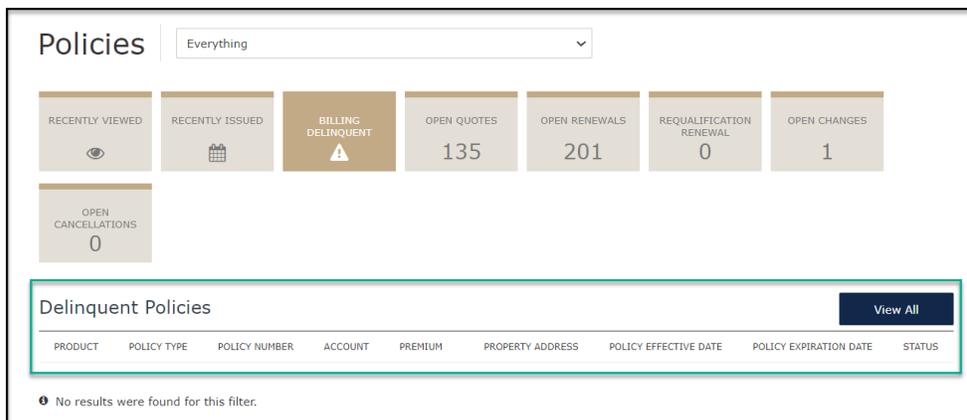
1. From the agent dashboard (i.e. the landing page when you log in to the Agent Portal), select "Policies."



2. Next, select "Billing Delinquent" to see if you have any policies with notices of cancellation due to non-payment.



3. This agent does not have any billing delinquent policies per the results shown below.



Part 2—Using The Billing Tab

1. Navigate to the policy you are checking the billing status on. Next select “Billing.”

Account: [redacted]
Residential (TWRD [redacted]) In Force

SUMMARY CONTACTS OPEN ACTIVITIES NOTES DOCUMENTS CLAIMS **BILLING**

COMMISSION

Change Policy Cancel Policy Privacy Policy

2. The results show the payment plan (shows 4-pay plan and the policyholder enrolled in Auto Pay) and the schedule of payments.

Account: [redacted]
Residential (TWRD [redacted]) In Force

SUMMARY CONTACTS OPEN ACTIVITIES NOTES DOCUMENTS CLAIMS **BILLING**

COMMISSION

Policy Period: 1: 10/11/2022 - 10/11/2023 (Current)

Total Premium: \$1,162.00
Total Costs: \$1,162.00

Payment Plan: TWIA 4 Pay
Auto Pay Enabled: Yes

Payment Schedule

BILL DATE	DUE DATE	STATUS	INVOICE TOTAL	OUTSTANDING	INVOICE #
10/6/22	10/11/22	Paid/Adjustment	\$318.00	\$0.00	1000848976
12/17/22	1/11/23	Planned	\$281.35	\$281.35	1000848977
3/17/23	4/11/23	Planned	\$281.33	\$281.33	1000848978
6/16/23	7/11/23	Planned	\$281.32	\$281.32	1000848979

