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."

	TEXA INSUR	S WINDSTORM						٢	<b>Q</b> Search		+ Start New Quote
*	Accounts	Policies	Claims	Activities	Commission	n Administration	Book Of E	usiness			
		Dashb	oard	Everything			```	•			
	OPEN QUOTES		OTES	OPEN POLICY CHANGES 1		OPEN CANCELLATIONS 0	OPEN	OPEN RENEWALS			

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

Policies	Everything			~		
	RECENTLY ISSUED	BILLING DELINQUENT	OPEN QUOTES	OPEN RENEWALS	REQUALIFICATION RENEWAL	OPEN CHANGES
OPEN CANCELLATIONS						

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

Policies	Everything			~			
RECENTLY VIEWED	RECENTLY ISSUED		OPEN QUOTES	OPEN RENEWALS	REQUALIFICATION RENEWAL 0	OPEN CHANGES	
OPEN CANCELLATIONS							
Delinquent P	olicies					Vi	ew All
		IER ACCOUNT	PREMIUM PROPER	TY ADDRESS POLICY	EFFECTIVE DATE	POLICY EXPIRATION DATE	CTATUC



## Part 2—Using The Billing Tab

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

SUMMARY CO				Account: Residential (TWRD) In Force										
	INTACTS OF	PEN ACTIVITIES	NOTES	documents	claims O	BILLING								
	ancel Policy					🛔 Privacy	y Policy							

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

Residential (TWRD .) In Force												
	CONTACTS	ITACTS OPEN ACTIVITIES NOTES		DOCUMENTS 8	CLAIMS O							
Policy Period	1: 10/11/20	022 - 10/11/2023 (Cu	rrent) 💙									
Total Premium			\$1,162.00	Payment Plan		7	rwiA 4 Pay					
Total Costs		\$1,:	162.00	Auto Pay	Yes							
Payment Sch	edule											
BILL DATE	DUE DATE	STATUS	+	ENVOICE TOTAL	OUTSTANDING	INVOICE #						
10/0/22	10/11/22	Paid/Aujustmen		\$310.00	30.00	100040370						
12/17/22	1/11/23	Planned		\$281.35	\$281.35	1000848977						
3/17/23	4/11/23	I/23 Planned		\$281.33	\$281.33	1000848978						
6/16/23	7/11/23	Planned		\$281.32	\$281.32	1000848979						

