



## **Attention Agents!**

**Agents are now able to sign up for the Recurring Payment Program (RPP) without making a payment.**

**And**

**You are now able to edit a customer's credit card information on RPP without deactivating their card!**

We have some exciting news to share! Agents are now able to sign up for the Recurring Payment Program (RPP) without making a payment. Also, Agents are able to edit a customer's credit card information on RPP without deactivating their card! We have added this feature to provide the ease of use for our agents, underwriters and FTZ.

representatives.

12AU001390955

**Customer Information**

Customer: NB FEE [Order UDI](#)

DOB: 01/01/1989

Address: 1234 MAIN ST  
City: CHICAGO  
State: IL  
Zip: 60629

Language: English

Mobile: [✎](#)  
Home: [✎](#)  
Other: [✎](#)  
Email: [✎](#)  
OCP Email: Not Registered

**Policy Information**

Type: Customer Since 2018  
Status: Cancelled - Non Payment  
Non-Renewal: ---  
Term: 6 Months  
Dates: 12/28/2018 - 06/28/2019

**Billing Information**

Bill Due Date/Amount: 02/28/2019 \$51.52  
Pay in Full (Excluding Fees): (\$0.52)  
Fee Balance: \$0.00  
Cancel Date: 01/28/2019  
Equity Date: 01/28/2019  
Cancel Sent: 01/14/2019  
RPP Status: None [✎](#)

**Agency Information**

Agency:  
Producer Code:  
Phone:  
Fax:  
Email:

**Buttons:** DB Corrections, Run Nightly Batch, Display Billing Schedule, Future Equity, Generate Revised Bills, Payment Override, **Manage RPP**, ReCalc Payment, View DB ID, Change Installments, Do Not Allow Reinstatement, Reinstatement Override, Return Premium Letter, Reviewed LL

**Navigation:** Bill, Direct Bill Admin, Documents

To enroll in RPP, click "Manage RPP" or click on the edit icon in the "RPP Status". These buttons will appear on a policy regardless if the customer is currently active on RPP or not.

RPP Status: None [✎](#)

### Recurring Payment Maintenance

Read the terms and agreement prior to signing up the customer

This policy is not currently signed up for Recurring Payments.

By checking this box, I have confirmed that customer has been read the following information, agrees to the terms of the recurring credit card program, and has provided authorization for the following:

- Your credit card will not be charged today. If you have a payment due today, we can take a manual payment.
- Your credit card will be charged each month for the premium/fees per your policy.
- Your card will be charged through the term of the policy and all renewal terms.
- Your signed authorization (obtained through your agent) is required should you choose to opt out of the program.
- If your card is declined for any reason (including invalid expiration date), you will automatically be removed from the recurring credit card program. Separate payment will be required to keep your policy in good standing.


This screen will appear to enroll a customer if the customer has NEVER signed up for RPP

[Add Card Information](#) [Cancel](#)

Add card information to enroll RPP

**RPP Signup** [X]

<b>Policy Number:</b>	<b>Withdrawal Date:</b>
12AU001391035	02/28/2019

Credit Card Number 5454 5454 5454 5454 

Expiration Date 01 / 21

Security Code 555

Cardholder on Policy?  Yes  No

Name RPP TEST

Address 1234 main st

Address 2

City Downers Grove

State IL [v]

Zip 60515

Phone 555 555 5555

**RPP pull date will be displayed**

**Add the customer's credit card info and complete all fields on the payment modal.**

Email cgibbs@aains.com

**Save** **Cancel**

12AU001391035

**Customer Information**

Customer: RP TEST Order UID

DOB: 10/01/1980

Address: 1234 MAIN ST  
City: DOWNERS GROVE  
State: IL  
Zip: 60515

Language: English

Mobile:   
Home:   
Other:   
Email:

OCP Email: Not Registered

Vehicles: 1   
Drivers: 1

**Policy Information**

Type: Customer Since 2019  
Status: In-Force  
Non-Renewal: ---  
Term: 6 Months  
Dates: 02/01/2019 - 08/01/2019

**Billing Information**

Bill Due Date/Amount: 03/01/2019 \$85.48  
Pay in Full (Excluding Fees): \$355.92  
Fee Balance:  
Cancel Date:  
Equity Date: 03/03/2019  
Cancel Send: 02/15/2019  
RPP Status: Activated   
RPP Pull Date: 02/28/2019

**RPP is now activated**

**RPP pull date is displayed**

**Go to "Manage RPP" to edit card information. Can access through the RPP edit icon in the RPP status OR button in the Direct Bill Admin tab.**

Policy History | Services | Claims | Direct Bill | **Direct Bill Admin** | Documents

DB Corrections | Run Nights | Future Equity | Generate PDF | ReCalc Payment | View DB ID | Change Installments | Do Not Allow Reinstale | Return Premium Letter | Reviewed LL

**Recurring Payment Maintenance**

Current Status:

Cardholder Name: RP TEST

Credit Card Number: \*\*\*\*\*5454

Expiration Date: 1/2021

Billing Zip Code: 60515

Cardholder Phone: 555-555-5555

E-Mail Address: cgibbs@aains.com

E-Mail Address Valid:

Cardholder on policy? Yes:  No:

**Edit credit card information without deactivating the RPP**

**12AU001391035**  
RP TEST

Validated:  
02/01/2019 11:02:38 AM by camegibbs

**View Log to see any changes to the RPP**

**View sign up and deactivation alerts** → Recurring Payments Alerts

12AU001391035

Close

Date/Time	Created By User	Description	Date of Alert	Resolved	Resolved By	Notes	Processed
02/01/2019 11:02:39 AM	cameogbbs	Thank You					No

**View all changes made to the RPP** → Recurring Payments Changes

12AU001391035

Close

Date/Time	Created By User	Change
02/01/2019 11:16:10 AM	cameogbbs	<p>Recurring Payments information was updated with the following:</p> <ul style="list-style-type: none"> <li>• Exp Month: 1 to 2.</li> <li>• Exp Year: 2021 to 2022.</li> <li>• Address: 1234 main st to 1324 main st.</li> <li>• City: Downers Grove to Aurora.</li> <li>• Zip: 60515 to 60502.</li> <li>• Phone: 555-555-5555 to 123-456-7890.</li> <li>• Email: cgbbs@aains.com to none@aains.com.</li> </ul>
02/01/2019 11:02:38 AM	cameogbbs	<p>Recurring Payments was activated with following information:</p> <ul style="list-style-type: none"> <li>• Name: RPP TEST</li> <li>• Last 4: 5454</li> <li>• Exp Date: 1/2021</li> <li>• Email: cgbbs@aains.com</li> </ul>

**Change log will display the old and new information**

Recurring Payment Maintenance

Current Status: Pending De-Activation  
 Changed by cameogbbs on 02/01/2019 11:43:32 AM

Cardholder Name: RPP TEST

Credit Card Number: \*\*\*\*\*5454

Expiration Date: 2/2022

Billing Zip Code: 60502

Cardholder Phone: 123-456-7890

E-Mail Address: none@aains.com

E-Mail Address Valid:

Cardholder on policy? Yes:  No:

**The procedure to de-activate RPP remains the same. You must select "Pending De-activation" from the drop-down to get the RPP cancellation form to generate.**

**The cancellation form or verbal statement from the customer is still required to de-activate a customer's RPP. Once this information is received, you may de-activate RPP.**

**To de-activate RPP, simply select "De-activated" and "save".**

12AU001391035  
RPP TEST

Validated: 02/01/2019 11:16:10 AM by cameogbbs

View Alerts

View Log

Cancellation Form

Edit Card Information

Save Cancel

Activated  
 De-Activated  
 Pending De-Activation

Term: 6 Months      Cancel Date: 01/18/2019  
 Dates: 12/18/2018 - 06/18/2019      Equity Date: 01/18/2019  
 Cancel Sent: 01/04/2019  
 RPP Status: **De-Activated**

### Recurring Payment Maintenance

Current Status: De-Activated  
Changed by cameogbbs on 02/01/2019 12:00:35 PM

Cardholder Name: rpp test

Credit Card Number: \*\*\*\*\*5454

Expiration Date: 1/2021

Billing Zip Code: 60515

Cardholder Phone:

E-Mail Address:

E-Mail Address Valid:

Cardholder on policy? Yes:  No:

Card information cannot be added or edited until a payment is made.

Policy History    **Services**    Claims    Direct Bill    Direct Bill Admin    Documents

Type	Effective	Expiration	Term Premium	Original Premium	Add/R Premi
<a href="#">Cancel</a>					
Non Payment of Installment	01/18/2019	06/18/2019	\$0	\$0	- \$356
<a href="#">New Business</a>	12/18/2018	01/17			

## Enter Payment

12AU001390946  
 ILLINOIS RPP TEST  
 1234 MAIN ST  
 DOWNERS GROVE, IL 60515

**The system will redirect you back to the payment page**

EZ-Pay		Current Balance & Equity		Balance & Equity After Payment	
Pay Policy Off in Full:	\$331.92	Premium Balance	(\$0.00)	Premium Balance	\$246.84
<b>Suggested Payment (including fees):</b>	<b>\$85.08</b>	Fee Balance:	\$0.00	Fee Balance:	\$0.00
		<b>Total Balance with Fees:</b>	<b>(\$0.00)</b>	<b>Total Balance with Fees:</b>	<b>\$246.84</b>
		Equity:	Jan 18, 2019	Equity:	Mar 5, 2019

Tender Type	Ref #	Amount
		\$ 85.08
<b>Total Paid:</b>		<b>\$85.08</b>

Sign Insured up for Recurring Payments? Yes:  No:

Card holder Name:

Card holder On Policy: Yes:  No:

E-Mail Address:

By checking the box below, I have confirmed that customer has been read the following information, agrees to the terms of the recurring credit card program, and has provided authorization for the following:

- Your credit card will be charged each month for the premium/fees per your policy.
- Your card will be charged through the term of the policy and all renewal terms.
- Your signed authorization (obtained through your agent) is required should you choose to opt out of the program.
- If your card is declined for any reason (including invalid expiration date), you will automatically be removed from the recurring credit card program. Separate payment will be required to keep your policy in good standing.

Accept

**The customer is able to sign back up for RPP while making a payment**

A Few things to remember:

Customers can still sign up for RPP when making their payment. This is an additional service to our customers who wish to sign up for RPP when their payment is not yet due.

Customers with SR-22 policies will be able edit their credit card information without having to de-activate their card. This option is available as long as their RPP status is “Activated”.

SR-22 policies will not be able to enroll in RPP mid-term. If the policy cancels or if RPP becomes de-activated due to a declined payment, the customer will have to wait until their renewal payment to enroll or sign back up again.

Non SR-22 policies are able to enroll in RPP up to the day before the expected RPP pull date and the payment will pull on the expected pull date.

Both Non SR-22 and SR-22 policies are able to edit the credit card information up to the day before the expected RPP pull date and the payment will pull on the expected pull date.

Thank you for your continued business!

Your friends at:  
American Access Casualty Company

Questions?

Please contact Underwriting Department at: (630) 645-7777