scribehow.com/shared/Eleviant_Checking_the_Security_First_Website_for_Payments__97x9wOzzQC6tdXqR4XrBVg

Run the Epic Report and Locate Policies On Carrier Website

Example: Payment Has Posted

Example: Payment Has NOT Posted and Billed to Insured

10 Click the carrot to expand the payment information

Cancellation & Reinstatement

Cancellation Date: / /   Last Day to Reinstate: /

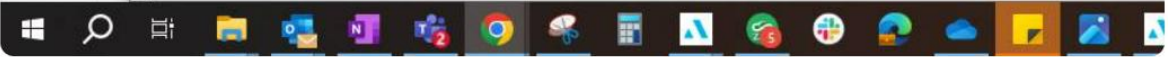| Installments | Payments | Refund Requests | Transactions | Billing Activity | Documents |

∨ Payments

Receipt Number	Outgoing Payment	Payment Type	Payment Subtype	Status
3272849		Cash	ACH	Paid

https://sfiprod.hostedinsurance.com/AgentPortal/Client-flow?execution=e1s4#

Run the Epic Report and Locate Policies On Carrier Website

Example: Payment Has Posted

Example: Payment Has NOT Posted and Billed to Insured

11 Locate the "Applied Amount" and "Receipt Date". Create the PRDB activity on the renewal term in Epic and close it.

ber	Outgoing Payment	Payment Type	Payment Subtype	Status	Applied Amount	Premium	Fees	Taxes
		Cash	ACH	Paid	$1,581.99	$1,529.00	$52.99	$0.00

Receipt Number: 3272849

Status: Paid

Receipt Date: 9/20/2023

Processed Date: 09 / 20 / 2023

Payment Type: Cash

Payment Subtype: ACH

Adjustment Reason:

Installment: 10/7/2023

Comments:

Applied Amount: $1,581.99

Premium: $1,529.00

Policy Fees: $52.99

Installment Fee: $0.00

Penalty Fee: $0.00

Late Fee: $0.00

Fees Tax: $0.00

Premium Tax: $0.00

Example: Payment Has NOT Posted and Billed to Insured

Run the Epic Report and Locate Policies On Carrier Website

Example: Payment Has Posted

Example: Payment Has NOT Posted and Billed to Insured

12 Scroll down and select "Payments" tab

Total Net Premium:	$1,639.00		Policy Fee(s):	$54.8
Net Premium Received:	$0.00		Assessed Installment Fee(s):	$0.00
Net Premium Remaining:	$1,639.00		Premium Tax:	$0.00

Cancellation & Reinstatement

Cancellation Date: ___ / ___ / ___   Last Day to Reinstate: ___ /

| Installments | Payments | Refund Requests | Transactions | Billing Activity | Documents |

˅ Installments

Installment #	Status ❓	Due Date ↑	Installment Amount ❓	Premium
1	Scheduled	10/8/2023	$1,041.26	$983.40
2	Scheduled	4/5/2024	$658.60	$655.60

3 of 4

Run the Epic Report and Locate Policies On Carrier Website

Example: Payment Has Posted

Example: Payment Has NOT Posted and Billed to Insured

11 Locate the "Applied Amount" and "Receipt Date". Create the PRDB activity on the renewal term in Epic and close it.

CARINA - Policy Management

| Cancellation Date: | / / | Last Day to Reinstate: | / / | Reinstatement Amount: |

| ...yments | Refund Requests | Transactions | Billing Activity | Documents |

...ber	Outgoing Payment	Payment Type	Payment Subtype	Status	Applied Amount	Premium	Fees	Taxes
		Cash	ACH	Paid	$1,581.99	$1,529.00	$52.99	$0.00

Receipt Number 3272849   Payment Type: Cash   Applied Amount: $1,581.99

Status: Paid   Payment Subtype: ACH   Premium: $1,529.00

Receipt Date: 9/20/2023   Adjustment Reason: Policy Fees: $52.99

Processed Date: 09 / 20 / 2023   Installment: 10/7/2023   Installment Fee: $0.00

Penalty Fee: $0.00

Late Fee: $0.00

Comments: Fees Tax: $0.00

Premium Tax: $0.00

Example: Payment Has NOT Posted and Billed to Insured

Run the Epic Report and Locate Policies On Carrier Website

Example: Payment Has Posted

Example: Payment Has NOT Posted and Billed to Insured

Insured

12 Scroll down and select "Payments" tab

Total Net Premium:	$1,639.00
Net Premium Received:	$0.00
Net Premium Remaining:	$1,639.00

Policy Fee(s):	$54.8
Assessed Installment Fee(s):	$0.00
Premium Tax:	$0.00

Cancellation & Reinstatement

Cancellation Date: ___ / ___ / ___   Last Day to Reinstate:

Installments **Payments** **Refund Requests** **Transactions** **Billing Activity** **Documents**

˅ **Installments**

	Installment #	Status ❓	Due Date ↑	Installment Amount ❓	Premium
▼	1	Scheduled	10/8/2023	$1,041.26	$983.40
▼	2	Scheduled	4/5/2024	$658.60	$655.60

Run the Epic Report and Locate Policies On Carrier Website

Example: Payment Has Posted

Example: Payment Has NOT Posted and Billed to Insured

13 Notice there are no entries

Cancellation & Reinstatement

Cancellation Date: ___ / ___ / ___   Last Day to Reinstate: ___ /

| Installments | **Payments** | Refund Requests | Transactions | Billing Activity | Documents |

∨ Payments

	Receipt Number	Outgoing Payment	Payment Type	Payment Subtype	Status

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Run the Epic Report and Locate Policies On Carrier Website

Example: Payment Has Posted

Example: Payment Has NOT Posted and Billed to Insured

14 Scroll back up and see that Bill To says Insured. Set up CNPY activity and indicate it's billed to the insured.

Management

Tue Sep 26 2023: Welcome, JOHN MICHAEL... ▾ ❓ Help

Policy Dashboard   Make Payment   Bind Policy   Action ▾   Save

int Number: **1844140**   Bill To Insured

Billing Address: 4811 Saxon Dr, A302, New Smyrna Beach, FL 32169-4410

oduct Type: Homeowners   Term: 10/08/2023 - 10/08/2024

yment Plan: 2 Pay Recurring   Equity Date: 10 / 08 / 2023

nent Status: Waiting For Funds   Gross/Net: Gross

Example: Payment Has NOT Posted and Billed to

4 of 4

Run the Epic Report and Locate Policies On Carrier Website

Example: Payment Has Posted

Example: Payment Has NOT Posted and Billed to Insured

Mortgagee

15 Scroll down and select "Payments" tab

Total Net Premium:	$2,462.00
Net Premium Received:	$0.00
Net Premium Remaining:	$2,462.00

Policy Fee(s):	$68.8
Assessed Installment Fee(s):	$0.00
Premium Tax:	$0.00

Cancellation & Reinstatement

Cancellation Date: ___ / ___ / ___   Last Day to Reinstate:

| Installments | **Payments** | Refund Requests | Transactions | Billing Activity | Documents |

⌄ **Installments**

Installment #	Status ❓	Due Date ↑	Installment Amount ❓	Premium
▼ 1	Billed	10/8/2023	$2,530.85	$2,462.00

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Run the Epic Report and Locate Policies On Carrier Website

Example: Payment Has Posted

Example: Payment Has NOT Posted and Billed to Insured

16 Notice there are no entries

Cancellation & Reinstatement

Cancellation Date: [ ] / [ ] / [ ]   Last Day to Reinstate: [ ] /

| Installments | **Payments** | Refund Requests | Transactions | Billing Activity | Documents |

∨ **Payments**

Receipt Number	Outgoing Payment	Payment Type	Payment Subtype	Status

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17 Scroll back up and see that Bill To says Mortgagee. Set up CNPY activity and

Run the Epic Report and Locate Policies On Carrier Website

Example: Payment Has Posted

Example: Payment Has NOT Posted and Billed to Insured

17 Scroll back up and see that Bill To says Mortgagee. Set up CNPY activity and indicate it's billed to the mortgagee.

> ⓘ   Tip! To perform the fuzzy check on the mortgagee between the carrier and Epic follow these steps.

Run the Epic Report and Locate Policies On Carrier Website

Example: Payment Has Posted

Example: Payment Has NOT Posted and Billed to Insured

18   Click "Policy Dashboard"

art Page   ✕ | +

?s13

: Online Pa...   ⚡ Epic LIBCO01   📁 Sheets   📁 Jotforms   📁 Sharepoint   📁 OneDrive   Ⓦ DSI Knowledge Bas...   » | 📁 All Bool

- Policy Management   Tue Sep 26 2023:   **Welcome, JOHN MICHAEL...** ▾   ❓ H

Policy Dashboard   (Make Payment)   (Bind Policy)   (Action ▾)   (Save)

Account Number: **1488205**   Bill To: Mortgagee

?414   Billing Address: 3861 NW 19TH ST, GAINESVILLE, FL 32605-2414

Product Type: Homeowners   Term: 10/08/2023 - 10/08/2024

Payment Plan: Full Payment   Equity Date: 10 / 08 / 2023

Payment Status: Waiting For Funds   Gross/Net: Gross

Run the Epic Report and Locate Policies On Carrier Website

Example: Payment Has Posted

Example: Payment Has NOT Posted and Billed to Insured

19 Click "View DEC Page"

Reference #:	P000106337	Status:	Active
Risk Address:	3861 NW 19TH ST, GAINESVILLE, FL 32605-2414		
Policy Inception Date:	10 / 08 / 2015	Payment Status:	Waiting For Funds
Agency Name:	DARR SCHACKOW INSURANCE AC	Agent Name:	JOHN MICHAEL DARR JR

tions

Document Actions

y As Of

View Policy Forms

y History

View DEC Page

y Mortgagee

View Billing Doc & Invoices

y Insured

Upload Attachment

rage Changes

rsements

write Policy

e.com/AgentPortal/Client-flow?execution=e2s14#

20 Click "Renewal Evidence of Property Insurance" document

Run the Epic Report and Locate Policies On Carrier Website

Example: Payment Has Posted

Example: Payment Has NOT Posted and Billed to Insured

20   Click "Renewal Evidence of Property Insurance" document

C ⌂   sfiprod.hostedinsurance.com/AgentPortal/Client-flow?execution=e2s15

ay - Inbox   📇 DealRoom Pipeline   🐝 Workvivo   ⠿ Timezone calculator   📊 Microsoft Online Pa...   ⚡ Epic LIBCO01   📒 Sheets   📒 Jotforms

rity First   ≡   CARINA - Policy Management

∨ Package

Created Date	Package Name	Recipient	Re...
▼ 8/19/2023, 6:44 AM	Renewal Evidence of Property Insurance ⓘ		
▼ 8/19/2023, 6:44 AM	Renewal Invoice ⓘ	ANYELO JIMENEZ	Cu
▼ 8/19/2023, 6:44 AM	Renewal ⓘ	ANYELO JIMENEZ	Cu
▼ 3/19/2023, 8:37 AM	Important Policy Notice-Change to Claims Reporting Timeline ⓘ	ANYELO JIMENEZ	Cu
▼ 8/19/2022, 6:49 AM	Renewal Evidence of Property Insurance ⓘ		
▼ 8/19/2022, 6:49 AM	Renewal Invoice ⓘ	ANYELO JIMENEZ	Cu

21   Open the document

Run the Epic Report and Locate Policies On Carrier Website

Example: Payment Has Posted
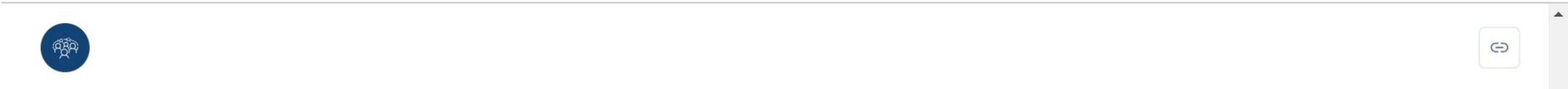
Example: Payment Has NOT Posted and Billed to Insured

21 Open the document

22 This is what the 1st page looks like, scroll down to the 2nd page

Run the Epic Report and Locate Policies On Carrier Website

Example: Payment Has Posted

Example: Payment Has NOT Posted and Billed to Insured

22 This is what the 1st page looks like, scroll down to the 2nd page

wnloads/Renewal%20Evidence%20of%20Property%20Insurance%20(2).pdf

2).pdf   1 / 2   — 100% +

Evidence of Property Insurance

Security First Insurance Company
P.O. Box 628336
Orlando, FL 32862-8336

Customer Service
(877) 333-9992

Policy Type: Homeowners HO3
Policy Number: P000106337
Policy Effective Date: 10/08/2023 12:01 AM
Policy Expiration Date: 10/08/2024 12:01 AM
Date Printed: 08/19/2023

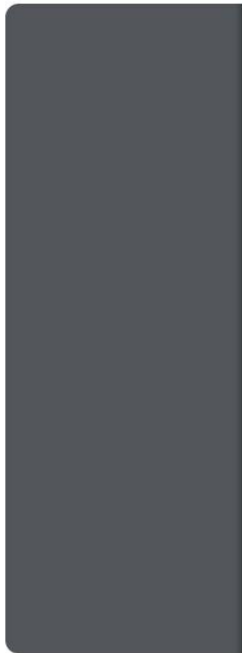| Agent Contact Information	Property Information
DARR SCHACKOW INSURANCE AGENCY, LLC JOHN MICHAEL DARR JR 5200 W NEWBERRY RD STE B GAINESVILLE, FL 32607-6109 Phone: (352) 338-0552 Email: info@darrschackowinsurance.com	Property Address: 3861 NW 19TH ST GAINESVILLE, FL 32605-2414

23 The mortgagee and loan number are listed here. Check these against what is

Run the Epic Report and Locate Policies On Carrier Website

Example: Payment Has Posted

Example: Payment Has NOT Posted and Billed to Insured

23 The mortgagee and loan number are listed here. Check these against what is listed in Epic.

Cancellation Information

Should any of the above described coverages be cancelled before the expiration date thereof, the issuing insurer will endeavor to mail 10 days' written notice to the additional interest named below. Failure to mail such a notice shall impose obligation or liability of any kind upon the insurer, its agents or representatives.

Additional Interests/Insureds/Mortgagees

Type: Mortgagee - First Mortgagee
Loan #: 0101958874
Name: AmeriHome Mtg Co., LLC ISAOA/ATIMA c/o CENLAR
Address: PO Box 202028, Florence, SC 29502-2028

_____
Authorized Representative

Safeco Insurance™
A Liberty Mutual Company

Billing & Payment Services - Personal

Close Window ☒

Enter Account/Policy Number: [   ] [Go]

| Account | Bill Info | Manage Money | Make a Payment |

Account Summary | Account History | Account Options | Transfer Policy | Paperless | Remarks

Account Summary

You are not authorized to view the requested billing account: 72068967765

Feedback

```csharp
        [TestMethod]
        ⓘ | 0 references
        public void TestBasicControls()
        {
            var application = FlaUI.Core.Application.Launch(@"C:\Data\Visual Studio Workspace\FlaUiPractice\FlaUIPractice\BankSystem\bin\Release\BankSystem.exe");
            var automation = new UIA3Automation();
            var mainWindow = application.GetMainWindow(automation);
            ConditionFactory cf = new ConditionFactory(new UIA3PropertyLibrary());

            mainWindow.FindFirstDescendant(cf.ByName("Registration")).AsButton().Click();
            mainWindow.FindFirstDescendant(cf.ByAutomationId("InFName")).AsTextBox().Enter("Yadagiri");
            mainWindow.FindFirstDescendant(cf.ByAutomationId("InLName")).AsTextBox().Enter("Reddy");
            mainWindow.FindFirstDescendant(cf.ByAutomationId("InAge")).AsComboBox().Select(4).Click();
            mainWindow.FindFirstDescendant(cf.ByAutomationId("InCountry")).AsComboBox().Select("India").Click();
            mainWindow.FindFirstDescendant(cf.ByAutomationId("InPhone")).AsTextBox().Enter("9876543210");
            mainWindow.FindFirstDescendant(cf.ByAutomationId("InEmail")).AsTextBox().Enter("jhabcdefhjk@gmail.com");
            mainWindow.FindFirstDescendant(cf.ByAutomationId("InPass")).AsTextBox().Enter("12345");
            mainWindow.FindFirstDescendant(cf.ByAutomationId("InCard")).AsTextBox().Enter("456378963215");
            mainWindow.FindFirstDescendant(cf.ByAutomationId("VipCheck")).AsCheckBox().Click();
            mainWindow.FindFirstDescendant(cf.ByName("Ok")).AsButton().Click();
            var congratulationsWindow = mainWindow.FindFirstDescendant(cf.ByName("Congratulations")).AsWindow();
            Assert.IsNotNull(congratulationsWindow);
            congratulationsWindow.FindFirstDescendant(cf.ByName("OK")).AsButton().Click();
            mainWindow.FindFirstDescendant(cf.ByName("Exit")).AsButton().Click();
            var exitWindow = mainWindow.FindFirstDescendant(cf.ByName("Exit")).AsWindow();
            exitWindow.FindFirstDescendant(cf.ByName("Yes")).AsButton().Click();
        }

        public void Ts
    }
}
```

Example: Payment Has Posted

9 Scroll down and select "Payments" tab

Total Net Premium: $1,529.00

Net Premium Received: $1,529.00

Net Premium Remaining: $0.00

Policy Fee(s): $52.9

Assessed Installment Fee(s): $0.00

Premium Tax: $0.00

Cancellation & Reinstatement

Cancellation Date: __ / __ / __

Last Day to Reinstate: __

Installments	Payments	Refund Requests	Transactions	Billing Activity	Documents

∨ Installments

Installment #	Status ❓	Due Date ↑	Installment Amount ❓	Premium
▼ 1	Paid	10/7/2023	$1,581.99	$1,529.00