Manual Billing Instructions for Brand New Policy :

For billing the policy, you will have to create the policy shell with the details of policy and then go to the transaction selecting the policy.

Open the policy document

Click on Policy shell in EPIC and select the radio button Contracted. Fill the blank fields, (Type, Description, Policy #, Effective Date, Expiry Date, Line, Status) checking the policy document. Select the Billing Type Agency Bill or Direct Bill. Add the Premium as per the policy. Update the Agency commission % and click on Detail

The Line screen will automatically open. Add Agency commission under the line tab if % is missing. Click on PR/BR Commission Tab and add producer code and commission percentage. Click on save and close all screens. Policy shell is created. For creating Transaction:

Go to Transactions and click on plus button to add transaction.

Select the policy you want to transact, select the code (renewal, endorsement, cancellation etc), Amount and click on Continue button

Make sure that accounting month and production month is the month of the effective start date of policy

Click on commission tab and make sure agency commission % is populated and producer code if any is entered. Click on Finish button.

Manual Billing Instructions for Renewal Policy :

Right Click on policy

Select Renew

Click Continue

Enter Premium

Write Commission amount

Click on Finish

Right Click on policy and select Issue Policy

Click Transactions.

Add transactions

Change Description

Click Finish

Manual Billing Instructions for Endorsement Policy :

Right Click on policy

Select Endorse/Revise (existing Line)

Lines of Business screen will open. Update Effective date of Change & Description

Click on Details

Enter Premium

Write Commission amount

Click on Finish

Right Click on policy and select Issue Policy

Click Transactions.

Add transactions, select Type Endorsement from the policy

Change Description

Click Finish

Auto Billing Instructions for RENEWAL Policy :

These companies Auto generate billing. However, we need to verify and check.

Wawanesa

Family

Gore Mutual

Intact

Optimum West

Aviva

Travelers

Mutual Fire

Open Account / Policy in Attachments. Check the premium amount

Go to Transactions verify premium is matching policy

Double click on the transaction.

Check Left Menu Fields – Agency Commission

Check Agency Field Percentage – this must not be zero and must 20%

Go to account details if there is a producer. Check Left Menu Fields – PR/BR Commission

Check Producer Code is entered here and Commission percentage is entered 50%

If this all match, then you are finished otherwise go to next step.

If zero agency Commission or PR/Br blank

Action – Adjust Commission. go to bottom Click Plus Button add Producer. Click OK

Action – Adjust Commission. go to top section add commission percentage 20% Click Ok

Click on POLICY – Line /Percentage change to 20%

Click on Tab PR/Br Commission   add producer. Click Save

Generating Invoice:

Go to Transaction screen and click on Actions

Select Generate Invoice

Click On Preview

The preview of invoice will open in a new window. View the invoice and click on Finish

Button. The invoice will be attached in the attachment of the client's account.

Billing Glass Policies :

Special Risk Glass Policies : For posting glass policies, check if there is any policy

attached in the clients account. If policy not attached, go to Sepcial Risk portal, search

the policy and download the policy. Attach the copy in the account and bill glass policy

as per the instructions mentioned above. Link for Special risk portal :

Agency ID : 1183 Password : Goldkey1

For Beck Glass Policy : Check if there is policy document attached in the client account,

if not then go to folder Homeowner X: drive ->Processing Folder->Beck Glass

Check if policies are there. If yes, attach the policy document in the clients account and bill the glass policy. If Policy document is not on the Beck Glass folder, login to Beck Glass Portal and download the policies. Below is the link for Beck Glass portal with password.

ID :

Password : sumrita1234

Family Insurance – Posting transaction for payment collected on Insurance companies portal :

Locate the client and go to Transactions

Click on Plus button (+)

Select the policy for which payment is collected. In Details section, select code PAYT. Enter the amount of payment collected in amount field. The amount will automatically change in negative sign. Click on continue. In the next screen, under Commission tab, make sure agency commission % is zero. Click on Finish button.

Note : if any client have policies for multiple locations, then the description of the policy should be added with the location address as well.