Billing Epic Processing Instructions

Workflow Step	Details
Agency Bill - Invoice Premiums	a) Highlight the policy b) Select Access in Tool Bar (top of the screen) c) Choose Transactions in Drop Down Menu o Click White Paper o Verify correct policy is highlighted o Select appropriate Service Summary Line o Verify appropriate radio buttons (Invoice, Basic, Agency, New Bill) o Complete Details o Select the applicable Code o Give a detailed description o Enter the amount o Select Continue d) Select Billing Tab o Verify Detail Information o Verify Structure Information e) Select Invoice Tab o Verify Client and Address information is accurate o Delievery Method keep as Mail f) Select Commissions Tab o Verify/Confirm Commissions and Producer Information g) Select Finish (If there are taxes or fees see Taxes & Fees step) ***DO NOT CLICK FINISH*** o Generate Invoice o Select appropriate Policy o Under Properties Select the Appropriate Layout in the Drop Down Menu o Select Preview and Confirm the information is accurate o Save to desktop if e-mailing the invoice o Select Finish (Prints) Note: invoice is available in attachments for future reference

Billing Epic Processing Instructions

Workflow Step	Details
Taxes & Fees (ie. Motor Vehcile Fee, Fire Fee, Excess Line Taxes/Fees (Wholesaler/Carrier Responsible to Pay Government Entity), etc.)	a) Click Add o Verify correct policy is highlighted o Select appropriate Service Summary Line o Verify appropriate radio buttons (Invoice, Basic, Agency, Existing) o Complete Details Choosing the Correspondig Taxes/Fees code o Click add for any additional taxes/fees b) Select Finish o Generate Invoice o Select appropriate Policy o Under Properties Select the Appropriate Layout in the Drop Down Menu o Select Preview and Confirm the information is accurate o Save to desktop if e-mailing the invoice o Select Finish (Prints)
Excess Line Taxes & Fees (Sterling to Pay Government Entity)	a) Click Generate Tax/Fee o Verify Information in Transaction is accurate o Select Finish b) Select Finish o Generate Invoice o Select appropriate Policy o Under Properties Select the Appropriate Layout in the Drop Down Menu o Select Preview and Confirm the information is accurate o Save to desktop if e-mailing the invoice o Select Finish (Prints)

Billing Epic Processing Instructions

Workflow Step	Details
Agency Bill Invoice Premiums on Installments	a) Highlight the policy b) Select Access in Tool Bar (top of the screen) c) Choose Transactions in Drop Down Menu o Click White Paper o Verify correct policy is highlighted o Select appropriate Service Summary Line o Choose the appropriate radio buttons (Invoice, Installment, Agency, New Bill) o Complete Details o Select the applicable Code o Give a detailed description o Enter the amount o Select Continue d) Select Billing Tab o Verify Detail Information o Verify Structure Information e) Select Invoice Tab o Verify Client and Address information is accurate o Delievery Method keep as Mail f) Select Commissions Tab o Verify/Confirm Commissions and Producer Information g) Select Continue h) Verify Installment Summary i) Select Finish (If there are taxes or fees see Taxes & Fees step) *DO NOT CLICK FINISH* o Generate Initial Invoice (Future invoices are generated automatically) o Select appropriate Policy o Under Properties Select the Appropriate Layout in the Drop Down Menu o Select Preview and Confirm the information is accurate o Save to desktop if e-mailing the invoice o Select Finish (Prints) Note: invoice is available in attachments for future reference
AE - If Direct Bill	Update servicing/billing section with line and policy level annualized and estimated premium and commission fields to reflect term premium.