RECURRING PAYMENT PLAN

AGENT’S EDITION

* Please be aware that all American Access Casualty Company material is confidential and should not be shared with anyone.

REVISED 082912
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</tbody>
</table>
American Access Casualty Company now offers the automatic payment option called the Recurring Payment Plan (R.P.P.). The objectives of this option are to decreased cancellation rate and increased convenience. The R.P.P. will be integrated into our current AAXIS system. Only credit/debit card payments with a VISA or MASTERCARD logo can be used to become a member of the R.P.P. A Policy Holder can become a member when making a payment using that card. American Access Casualty Company does not accept credit/debit cards using a PIN therefore they cannot be used to become a member of the R.P.P.

AN ACTIVE POLICY HOLDER CAN SIGN UP FOR THE R.P.P. DURING A PAYMENT IF THEIR POLICY IS A DIRECT BILL POLICY AND THEY ARE NOT ALREADY A MEMBER OF THE R.P.P.
A Policy Holder does not have to be present at the time they become a member of the R.P.P.

POLICY HOLDERS WILL BE NOTIFIED OF THE R.P.P.
Every bill and receipt of Policy Holders who are not members of the R.P.P. will included an ad for it.

RENEWING A POLICY IF THE POLICY HOLDER IS A MEMBER OF THE R.P.P.
The minimum down payment to renew the policy will be debited. This will renew the policy. Renewal Bills will explain this.

Policies will automatically renew if the Policy Holder is a member of the R.P.P even when a Policy has been preprogrammed to change Broker of Record at Renewal.

ADDITIONAL PREMIUM ENDORSEMENT PAYMENT PROCESS IF THE POLICY HOLDER IS A MEMBER OF THE R.P.P.
After an additional premium endorsement payment is posted, the subsequent minimum amounts that will be due may be more than previous minimum amounts that were due. If they the subsequent minimum amounts that will be due are more, then the bills will reflect the change.

CANCELLING THE R.P.P.
American Access Casualty Company must receive a completed R.P.P. Cancellation Form and it must be processed by an American Access Casualty Company Representative in order cancel the R.P.P.

The minimum amounts due will continue to be debited until the R.P.P. Cancellation Form is received and processed.
The question **Sign insured up for Recurring Payments?** has been added to the payment screen.

If **No:** is selected for **Sign insured up for Recurring Payments?** continue with the normal payment process.

If **Yes:** is selected for **Sign insured up for Recurring Payments?** the following will appear:

*(ALL FIELDS ARE REQUIRED)*

If **E-Mail Address:** is left blank the following will appear:

Continue with the normal payment process after making a selection.
SIGNING UP A POLICY HOLDER FOR THE R.P.P.

If *Card holder On Policy:* is answered *No:* the following will appear *(ALL FIELDS ARE REQUIRED):*

![Image](image-url)

If *E-Mail Address:* is left blank the following will appear:

![Image](image-url)

Continue with the normal payment process after making a selection.
MANUALLY POSTING A PAYMENT WHEN A POLICY HOLDER IS A MEMBER OF THE R.P.P.

Posting manual payments does not stop the R.P.P.’s scheduled payments from being debited. When a policyholder is a member of the RPP and an attempt is made to manually post a payment (by clicking **POST PAYMENT** on the **Direct Bill Inquiry** screen) the following will appear:

![Windows Internet Explorer window showing a message about policy activation](image)

*This policy is currently pending full activation for recurring payments, awaiting paperwork.*

Click **Cancel** to cancel the transaction and stay on the **Direct Bill Inquiry** screen.
MANUALLY POSTING A PAYMENT WHEN A POLICY HOLDER IS A MEMBER OF THE R.P.P.

Click [OK] to continue with the payment. The following screen will appear:

![Windows Internet Explorer]

Policy is currently signed up for Recurring Credit Card Payments

Do you wish to continue with this payment?

[OK] [Cancel]

Click [OK] to continue with the payment. The following screen will appear:

![Enter Payment]

Policy is currently signed up for Recurring Credit Card Payments.
MANUALLY POSTING A PAYMENT WHEN A POLICY HOLDER IS A MEMBER OF THE R.P.P.

If all the required information is entered and Continue is clicked the following will appear:

Click Cancel to cancel the transaction and stay on the Enter Payment screen.

Click OK to continue with the normal payment process.

*Posting manual payments does not stop the R.P.P.’s scheduled payments from being debited.*
RECURRING PAYMENT MAINTENANCE

The following screen (Recurring Payment Maintenance) will appear when “This policy is currently signed up for recurring payment.” on the Direct Bill Inquiry screen is clicked:

Update any information if necessary.

If Is card holder on the policy? is answered No: the following will appear:

(ALL FIELDS ARE REQUIRED)

Click View Alerts to view the Alerts. The following screen will appear:

Click Close to return to the Recurring Payment Maintenance screen.
RECURRING PAYMENT MAINTENANCE

The following will appear:

Click **No** to stay on the *Recurring Payments Changes/View Alerts* screen.

Click **Yes** to return to the *Recurring Payment Maintenance* screen.

Click **View Change Log** to view the Change Logs. The following screen will appear:
RECURRING PAYMENT MAINTENANCE

Recurring Payments Changes

Policy Number:

Date/Time:  
Created By User:  
Change:  
Close

Click to return to the Recurring Payment Maintenance screen.

The following will appear:

Click to stay on the Recurring Payments Changes/View Change Log screen.

Click to return to the Recurring Payment Maintenance screen.

Click to update the information and return to the Direct Bill Inquiry screen.

Click to cancel the update and return to the Direct Bill Inquiry screen.
CANCELLING THE R.P.P.

An Agent and an American Access Casualty Company Representative can start the cancellation process via the Current Status: drop down box on the Recurring Payment Maintenance screen.

If Pending De-Activation is selected and Submit is clicked the following message will appear:

![Image](image1.png)

If Cancel is clicked the user will be returned to the Recurring Payment Maintenance screen.

If OK is clicked the system will generate the Cancellation Form. (see page 13)

Click Cancellation Form to also view the Cancellation Form. (see page 13).

If Spanish was chosen for Language: the form will be in Spanish.

* The R.P.P. will not be de-activated/cancelled until the Cancellation Form is received and processed by an American Access Casualty Company Access Representative.
CANCELLING THE R.P.P.

If an American Access Casualty Company Representative begins the cancellation process the R.P.P. Cancellation Form will be attached to an email that is sent to the Policy Holder if they provided an email address. If they did not provide one the R.P.P. Cancellation Form will be mailed to them.

If an Agent begins the cancellation process the R.P.P. Cancellation Form will appear in a new window.

The R.P.P. Cancellation Form will then be available in View All Documents on the policy’s homepage and in Cancellation Form in the Recurring Payment Maintenance screen.

If Spanish was chosen for Language: the form will be in Spanish.

---

"Respectfully deliver the most convenient and accessible Auto Insurance."

***RECURRING PAYMENT PLAN CANCELLATION FORM***

NAME

ADDRESS1
ADDRESS2

Date: / / 
Policy #: AU

I, ____________________________, would like for American Access Casualty Company to cancel the recurring payment plan effective immediately.

(REPRINT NAME) 

SIGNATURE OF INSURED ____________________________ DATE __________________

* PLEASE NOTE THAT WE WILL CONTINUE TO DEBIT YOUR ACCOUNT UNTIL THIS FORM IS SIGNED, DATED AND RECEIVED BY AMERICAN ACCESS CASUALTY COMPANY.

MAIL TO: American Access Casualty Company
1 S 450 Summit Avenue Suite 230
Oakbrook Terrace, IL 60181

PHONE #: 1(630) 570-7181 (Policy Services)
FAX TO: 1(630) 645-7788  6888568
EMAIL: policydocs@aaic.com

RPPCFEN2010
A Policy Holder can become a member of the R.P.P. when making a payment if their policy is a Direct Bill policy and they use an credit/debit card to make the payment that is accepted by American Access Casualty Company.

Agents that do not have EPX, American Access Casualty Company’s credit/debit system, activated cannot signup Policy Holders for the R.P.P.

A Policy Holder can only be removed from the R.P.P. if:

1. Their Policy cancels for Non-Payment

   OR

2. Their Credit Card is declined when the system tries to debit the payment.

   OR

3. A completed RPP Cancellation Form is received and processed by an American Access Casualty Company Representative.

Posting manual payments does not stop the R.P.P.’s scheduled payments from being debited.

American Access Casualty Company will be working the R.P.P. Dash Board Reports and entering notes. An Agent has access to these reports but American Access Casualty Company suggests not working them in order to potentially avoid contacting the Policy Holder multiple times for the same reason. If an Agent works the reports American Access Casualty Company suggests that the Agent enter noted so that it does not work them twice.

There are 2 stages to cancelling the R.P.P.:

1. **Starting the cancellation process (Pending De-Activation)**
   An Agent and an American Access Casualty Company Representative can start the cancellation/pending de-activation process via the *Recurring Payment Maintenance*

2. **Cancellation (De-Activation)**
   Only an American Access Casualty Company Representative Access Representative can cancel/de-activate the R.P.P. when they receive and process a completed R.P.P. Cancellation Form
RECENT UPDATES

An Underwriter manually reinstated a policy without a lapse and the Policy Holder is a member of the R.P.P.

Previously if an Underwriter manually reinstated a policy without a lapse the R.P.P. payment would be debited on the transaction submit date rather than the original debit date. This has been resolved.

EXAMPLE:

The R.P.P. payment will be debited the day before the due date on 08/02/2012. This is consistent with the original signup of R.P.P. at New business.

If there is a lapse in coverage the new date the R.P.P. payment will be debited will be based on the transaction date of the reinstatement.
RECENT UPDATES
When a Policy Holder becomes a member of the R.P.P. midterm – All states except Nevada

If an Insured becomes a member of the R.P.P. midterm the date the R.P.P. payment will be debited will be based on the date of the sign up. This is true for all states except Nevada.

EXAMPLE (all states except Nevada):
The sign up date is 07/02 and the next pull date is 08/02 (the day before the due date)

---

This policy is currently signed up for recurring payments.

POST PAYMENT

Direct Bill Transactions

<table>
<thead>
<tr>
<th>Transaction Date</th>
<th>Post Mark OR Bill Due Date</th>
<th>Description</th>
<th>Premium/Amount</th>
<th>Total DB Fees</th>
<th>Total Policy Fees</th>
<th>Running Total</th>
<th>Payment Mode</th>
<th>Check Number/Bank Status</th>
<th>User</th>
<th>NSF</th>
<th>Void</th>
<th>Memo</th>
</tr>
</thead>
<tbody>
<tr>
<td>06/03/2012</td>
<td>06/04/2012</td>
<td>New Business</td>
<td>255.00</td>
<td>0.00</td>
<td>255.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>06/03/2012</td>
<td></td>
<td>NB Down Payment</td>
<td>-49.20</td>
<td>0.00</td>
<td>195.60</td>
<td>255.00</td>
<td>Receipts</td>
<td></td>
<td>test</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Bill/Cancel-sent Update Due Date</td>
<td>49.77</td>
<td>0.00</td>
<td>195.60</td>
<td></td>
<td></td>
<td>Receipts 03000201</td>
<td>test</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>07/02/2012</td>
<td></td>
<td>Installment Payment</td>
<td>-49.77</td>
<td>0.00</td>
<td>156.03</td>
<td></td>
<td>Receipts</td>
<td>Receipts 03000203</td>
<td>test</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>07/02/2012</td>
<td></td>
<td>Recieve Bill/Cancel Update Due Date</td>
<td>49.76</td>
<td>0.00</td>
<td>156.03</td>
<td></td>
<td>Receipts</td>
<td>EPX: 012835</td>
<td>test</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

TOTALS: 156.03 10.00 0.00
**RECENT UPDATES**

When a Policy Holder becomes a member of the R.P.P. midterm – Nevada only

If an Insured becomes a member of the R.P.P. midterm in Nevada, the first R.P.P. payment will be debited will be the day before the equity runs out. The subsequent dates that will the R.P.P. payment will be debited will be based on whatever date the R.P.P. was originally debited. (see page 18)

**Example (Nevada only):**

The sign up date is 7/23 and the first pull after sign up is 08/31 (the day before equity)
RECENT UPDATES
The subsequent dates that will the R.P.P. payment will be debited – Nevada only

In Nevada the first RPP pull date used to be the day before the bill due date. The first pull date has been changed to the day before equity.

EXAMPLE:
RPP did not pull on 06/20 which is the day before the bill due date
RPP did pull on 07/06 which is the day before equity

![Policy Details]

This policy is currently signed up for recurring payments.
POST PAYMENT

<table>
<thead>
<tr>
<th>Transaction Date</th>
<th>Post Marks Or Bill Due Date</th>
<th>Description</th>
<th>Premium/Amount</th>
<th>Total DB Fees</th>
<th>Total Policy Fees</th>
<th>Running Total</th>
<th>Payment Mode</th>
<th>Check Number/Bank Status</th>
<th>User</th>
<th>NSF</th>
<th>Void</th>
<th>Memo</th>
</tr>
</thead>
<tbody>
<tr>
<td>06/05/2012</td>
<td>06/06/2012</td>
<td>New Business</td>
<td>1,250.00</td>
<td>0.00</td>
<td>1,250.00</td>
<td></td>
<td>test nvi</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>06/05/2012</td>
<td></td>
<td>Policy Fee</td>
<td>0.00</td>
<td>20.00</td>
<td>1,270.00</td>
<td>1,172.07</td>
<td>test nvi</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>06/05/2012</td>
<td></td>
<td>NB Down Payment</td>
<td>-105.93</td>
<td>0.00</td>
<td>1,162.07</td>
<td>1,152.07</td>
<td>test nvi</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>06/05/2012</td>
<td></td>
<td>Policy Fee Paid</td>
<td>0.00</td>
<td>-20.00</td>
<td>1,162.07</td>
<td>1,152.07</td>
<td>test nvi</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>06/06/2012</td>
<td>06/21/2012</td>
<td>Bill Sent Update</td>
<td>116.03</td>
<td>Inst $10 Total: 10.00</td>
<td>Inst $10 Total: 10.00</td>
<td>Batch Processing</td>
<td></td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>06/22/2012</td>
<td>07/07/2012</td>
<td>Cancel Sent Update</td>
<td>116.03</td>
<td>Inst $10 Total: 10.00</td>
<td>Inst $10 Total: 10.00</td>
<td></td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>07/06/2012</td>
<td>07/06/2012</td>
<td>Installment Payment</td>
<td>-116.03</td>
<td>Inst $10 Total: 10.00</td>
<td>Inst $10 Total: 10.00</td>
<td></td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
RECENT UPDATES
The subsequent dates that will the R.P.P. payment will be debited – Nevada only

The Next RPP pull date will be 8/3, holding the date of the month (3rd) from the previous month.

At any time equity is in the past that causes a revised cancellation to generate with an earlier due date RPP will pull the day before the cancel date
For an Illinois policy with an SR22, the first RPP pull will be day before the bill due date, which is 26 days. Subsequent pull days will be the same date of the month.

**EXAMPLE:**

The RPP pull date is the 23rd of each month.
American Access Casualty Company will no longer send immediate bill/cancels once a policy is issued. The system will wait approximately 16-18 days after policy issuance. This rule is excluded for all of the following types of policies:

- Nevada
- Arizona
- Illinois SR-2 policies

EXAMPLE:

Policy issued effective 06/05. The bill/cancel did not generate till 06/23/12 with a 07/07 due date.
RECENT UPDATES

The system used to ask for a minimum of $5 for an endorsement down payment even if the total amount of the endorsement was less than $5.00.

The system used to ask for a minimum of $5 for an endorsement down payment even if the total amount of the endorsement was less than $5.00. This has been changed for the actual amount to be collected if the amount is less than $5.00.

EXAMPLE:

In this scenario Towing was added for a paid in full policy which caused an additional premium of $3.00. The system is only asking for the $3.00.
In order to alleviate the Bill/Cancel SR/22/26 scenario we are collecting an installment payment minus the installment fee at the time of endorsing an SR/22.

**EXAMPLE:**

SR-22 was endorsed on 07/08. The system will take a payment equal to the installment payment minus the fee. The initial revised bill will be in a 22/26 scenario however as soon as the current bill is paid it will no longer be in a 22/26 scenario.

Please keep in mind the following:

- We do not allow RPP signup mid-term on an SR-22 policy
- If an endorsement is processed midterm on a non-sr22 policy it is possible that the system will be in a 22/26 scenario if the current bill has not been paid. To avoid this collect the current bill plus the Endorsement payment to add the SR-22
- A bill/cancel will generate if a policy is pending cancel for uw reasons however a cancel bill will not. Cancel bill will generate only after the policy has been reinstated for uw reasons.
- If the particular state has an sr-22 fee this will be collected at the time the endorsement to add SR-22 has been processed.

---

**Transaction Date** | **Premium/Amount** | **Total DB Fees** | **Total Policy Fees** | **Running Total** | **Check Number/Bank Status** | **Memo**
---|---|---|---|---|---|---
06/07/2012 06/08/2012 | New Business | 592.00 | 0.00 | 592.00 | | test br
06/07/2012 | Policy Fee | 0.00 | 10.00 | 592.00 | | test br
06/07/2012 | Theft Prevention Fee | 0.00 | 2.00 | 594.00 | | test br
06/07/2012 | NB Down Payment | -49.44 | 0.00 | 544.56 | Receipts 3300492 | test br X X
06/07/2012 | Theft Prevention Fee Paid | 0.00 | -2.00 | 542.56 | Receipts 3300492 | test br
06/07/2012 | Policy Fee Paid | 0.00 | -10.00 | 532.56 | Receipts 3300492 | test br
06/25/2012 07/01/2012 | Bill/Cancel Sept Update Due Date | 62.43 | Inst $13 Total 13.00 | 0.00 | 532.56 | test br
07/04/2012 | EN Down Payment | -49.43 | 0.00 | 483.13 | Receipts 3300493 | test br X X
07/09/2012 | SR-22 Fee | 0.00 | 25.00 | 508.13 | | test br
07/09/2012 | SR-22 Fee Paid | 0.00 | -25.00 | 483.13 | Receipts 3300493 | test br
07/09/2012 07/10/2012 | Bill/Cancel Sept Update Due Date SR22 Resend | 62.43 | Inst $13 Total 13.00 | 0.00 | 483.13 | test br
07/15/2012 | Installment Payment | -62.43 | Inst $13 Total 13.00 | 0.00 | 430.70 | Receipts 3300494 | test br X X
07/16/2012 08/16/2012 | Resend Bill Update Due Date SR22 Resend | 62.43 | Inst $13 Total 13.00 | 0.00 | 430.70 | test br
EXAMPLE:

Days left in term = 136

Days left till bill due date = 14

832/136 = 6.11 per day

6.11 * 14 = 86 Suggested Payment (including fees):

(also see page 25)
**RECENT UPDATES**

Calculating Endorsement *EN Down Plus Next Bill Amount (with fees)*:

*EN Down Plus Next Bill Amount (with fees)*: = original bill + dollars per day * 31 + dollars per day * 14

**EXAMPLE:**

832/136 = 6.1176 new dollars per day

6.1176*14 = 85.64

6.1176*31 = 189.64

Original bill = 58.38

85.64 + 189.64 + 58.38 = 334 *EN Down Plus Next Bill Amount (with fees)*:

*(also see page 24)*
Policy was endorsed on 07/16 with an additional premium. A revised bill was sent with the higher amount with the due date of 07/30/2012. When the endorsement was processed the receipt due date matches the bill due date.

### Direct Bill Inquiry

<table>
<thead>
<tr>
<th>Policy Number:</th>
<th>12AU000912390</th>
</tr>
</thead>
<tbody>
<tr>
<td>Effective:</td>
<td>06/29/2012 - 12/29/2012</td>
</tr>
<tr>
<td>Term:</td>
<td>6 Month</td>
</tr>
<tr>
<td>Producer:</td>
<td>0904-0004-L</td>
</tr>
<tr>
<td>Policy Status:</td>
<td>In-Force</td>
</tr>
<tr>
<td>Insured:</td>
<td>TEST RPP</td>
</tr>
<tr>
<td>Address:</td>
<td>123 FIRST STREET CHICAGO IL 60612</td>
</tr>
<tr>
<td>Bills Left:</td>
<td>5 of 5</td>
</tr>
<tr>
<td>Bill Sent:</td>
<td>Yes</td>
</tr>
<tr>
<td>Next Bill Due:</td>
<td>08/30/2012</td>
</tr>
<tr>
<td>Next Bill Amt:</td>
<td>$207.40</td>
</tr>
<tr>
<td>Total Balance:</td>
<td>$1,212.29</td>
</tr>
<tr>
<td>Equity Date:</td>
<td>07/30/2012</td>
</tr>
</tbody>
</table>

**This policy is currently signed up for recurring payments.**

**POST PAYMENT**

### Direct Bill Transactions

<table>
<thead>
<tr>
<th>Transaction Date</th>
<th>Post Mark OR Bill Due Date</th>
<th>Description</th>
<th>Premium/Amount</th>
<th>Total DB Fees</th>
<th>Total Policy Fees</th>
<th>Running Total</th>
<th>Payment Mode</th>
<th>Check Number/Bank Status</th>
<th>User</th>
<th>NSF</th>
<th>Void</th>
<th>Memo</th>
</tr>
</thead>
<tbody>
<tr>
<td>07/29/2012</td>
<td>06/29/2012</td>
<td>New Business</td>
<td>236.00</td>
<td>0.00</td>
<td>236.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>test ii</td>
</tr>
<tr>
<td>07/28/2012</td>
<td>---</td>
<td>NB Down Payment</td>
<td>- 40.20</td>
<td>0.00</td>
<td>195.80</td>
<td></td>
<td></td>
<td>Receipts 3390487</td>
<td>EPX: 024679</td>
<td></td>
<td>X</td>
<td>test ii</td>
</tr>
<tr>
<td>07/16/2012</td>
<td>07/17/2012</td>
<td>Endorsement</td>
<td>1,104.00</td>
<td>0.00</td>
<td>1,299.80</td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td>test ii</td>
</tr>
<tr>
<td>07/16/2012</td>
<td>07/30/2012</td>
<td>Bill/Cancel/Update Due Date</td>
<td>49.77</td>
<td>Inst $10.00 Total: 10.00</td>
<td>0.00</td>
<td>1,299.80</td>
<td></td>
<td>0</td>
<td>test ii</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>07/16/2012</td>
<td>---</td>
<td>EN Down Payment</td>
<td>- 87.51</td>
<td>0.00</td>
<td>1,212.29</td>
<td></td>
<td></td>
<td>Receipts 3390485</td>
<td></td>
<td></td>
<td>X</td>
<td>test ii</td>
</tr>
<tr>
<td>07/16/2012</td>
<td>07/30/2012</td>
<td>Bill/Cancel/Update Due Date</td>
<td>257.40</td>
<td>Inst $10.00 Total: 10.00</td>
<td>0.00</td>
<td>1,212.29</td>
<td></td>
<td>0</td>
<td>test ii</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>TOTALS</strong></td>
<td></td>
<td></td>
<td>1,212.29</td>
<td>0.00</td>
<td>0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>test ii</td>
</tr>
</tbody>
</table>

---

**Insurance Company:** American Access Casualty Company  
**Receipt Number:** 3390488  
**Store:** ALLSAFE INSURANCE GROUP OF COMPANIES, INC  
**Phone:** 773-628-7336  
**Address:** 5207 N HARLEM AVENUE  
CHICAGO, IL 60656  
**Agent:** test  
**Date/Time:** 07/16/2012 3:05PM CT  
**Name:** TEST RPP  
**Address:** 123 FIRST STREET  
CHICAGO, IL 60612

**Policy 12AU000912390 Premium:** $87.51  
**Total EN Down Payment:** $87.51

<table>
<thead>
<tr>
<th>Cash:</th>
<th>87.51</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total:</td>
<td>87.51</td>
</tr>
</tbody>
</table>

**Next Due Date:** 07/29/2012

Thank you for your payment!
RECENT UPDATES
Prevent debiting the R.P.P. payment twice in one month

In order to prevent the R.P.P. payment from debiting twice in one month a report will now be generated with a list of policies that had RPP pulled less than 28 days of the current pull date. Underwriting will review this report and approve the pull of the RPP in these scenarios.

EXAMPLE:

An endorsement was processed by an I-user that moved equity back due to no down payment. Equity moved back to 07/16 therefore the new RPP pull date is 07/15.

07/15 is less than 28 days from the previous RPP pull date of 06/27 therefore this policy will appear on the report. Since no down payment was collected from the insured, underwriting will approve the payment to be pulled on 07/15.

In the event that equity and the RPP pull date is in the past RPP will pull the day before the cancel due date.
PRODUCER DASHBOARD REPORTS OVERVIEW

**Producer Dashboard – Credit Card Declined (PRXXX)**
- Displays the policies whose RPP credits cards were declined when the attempt was made by the system to take payment. The policies will appear on the report the same day the payment is declined.

**Producer Dashboard – Credit Card Expiration (PRXXX)**
- Displays the policies whose RPP credits cards will or have expired. The policies will appear on the report 30 days prior to the card’s expiration date.

**Producer Dashboard – Pending RPP Cancellation Request Form (PRXXX)**
- Displays the policies that are missing the RPP cancellation request form. The policies will appear on the report 10 days after “Pending Cancellation” has been selected in the Recurring Payment Maintenance screen if the Cancellation form has not been received and processed by AACC.
The **Credit Card Declined** report consists of the following sections:
- **Policy #**
- **Insured Name**
- **Date Declined**
- **Dashboard Status**

Click the **Policy #**’s hyperlink to enter the policy’s main page (click the web browser’s **Back** button to return to the **Credit Card Declined** report).

Click the **<--- Return to Reports** hyperlink to view return to the **Reports** page.
- Determine which policy to work and click the corresponding +.
- The following will appear:

```
<table>
<thead>
<tr>
<th>Policy Number</th>
<th>Insured Name</th>
<th>Date Declined</th>
<th>Dashboard Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Policy #</td>
<td>AU</td>
<td>12/27/2010</td>
<td>[view/change]</td>
</tr>
</tbody>
</table>
```

- The following information is provided:
  - Policy Number
  - Insured Name
  - Address
  - Phone Number
  - Language
  - Status
  - Date Declined
  - Payments
  - Credit Card Info
  - Notes
  - Cardholder Name
  - Cardholder Phone

- Click the [view/change] hyperlink to view or change the policy's dashboard status.
- The following will appear:

```
Status: 
Date/Time: 
User: 
```
• Use the **Status**: drop down box to select the dashboard status from the list provided:

<table>
<thead>
<tr>
<th>Status</th>
<th>Date/T</th>
<th>User</th>
</tr>
</thead>
<tbody>
<tr>
<td>Left message</td>
<td>No activity</td>
<td>Phone disconnected or incorrect</td>
</tr>
<tr>
<td>Contact - Expecting action from customer</td>
<td>Do not contact again - Insured elsewhere</td>
<td></td>
</tr>
<tr>
<td>Do not contact again - Other</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

• Click the **[close]** hyperlink to close the window or click **save** to save any changes.

• Saved entries can be viewed by clicking the **View/Create Note** hyperlink found on the policy’s main screen and in the **Dashboard Status** column of the **Credit Card Declined** report.

• Click the **Make a Payment** hyperlink to make a payment.

• Clicking the **Update Credit Card Info** hyperlink will open the **Recurring Payment Maintenance** screen where the credit card’s information can be updated (see page 9).

• Click **[view]** to view the policy’s notes screen.

• The following screen will appear:

  Policy Notes - AU

<table>
<thead>
<tr>
<th>Date</th>
<th>Type</th>
<th>User</th>
<th>Note</th>
</tr>
</thead>
</table>

  • Click **New Note** to enter a new policy note.

  • Click **Return to Policy** to enter the policy’s main page.

  • Click the web browser’s **Back** button to return to the **Credit Card Declined** report.
The Credit Card Expiration report consists of the following sections:
- Policy #
- Insured Name
- CC Expiration Report
- Dashboard Status

Click the Policy #’s hyperlink to enter the policy’s main page (click the web browser’s Back button to return to the Credit Card Expiration report).

Click the --- Return to Reports hyperlink to view return to the Reports page.
Determine which policy to work and click the corresponding +.

The following will appear:

The following information is provided:
- Policy Number
- Insured Name
- Address
- Phone Number
- Language
- Status
- CC Expiration Date
- Credit Card Info
- Notes
- Cardholder Name
- Cardholder Phone

Click the bar to close the window and return to the entire Credit Card Expiration report.

Click the Policy #’s hyperlink to enter the policy’s main page (click the web browser’s Back button to return to the Credit Card Expiration report).

Click the [view/change] hyperlink to view or change the policy’s dashboard status.

The following will appear:
CREDIT CARD EXPIRATION REPORT
Producer Dashboard – Credit Card Expiration (PRXXX)

- Use the Status: drop down box to select the dashboard status from the list provided:

  ![Status Dropdown]

- Click the [close] hyperlink to close the window or click save to save any changes.

- Saved entries can be viewed by clicking the View/Create Note hyperlink found on the policy’s main screen and in the Dashboard Status column of the Credit Card Expiration report.

- Clicking the Update Credit Card Info hyperlink will open the Recurring Payment Maintenance screen where the credit card’s information can be updated (see page 9).

- Click [view] to view the policy’s notes screen.

- The following screen will appear:

  ![Policy Notes Screen]

  - Click New Note to enter a new policy note.
  - Click Return to Policy to enter the policy’s main page.
  - Click the web browser’s Back button to return to the Credit Card Expiration report.
The **Pending RPP Cancellation Form** report consists of the following sections:
- **Policy #**
- **Insured Name**
- **RPP Cancellation Request Date**
- **Dashboard Status**

- Click the **Policy #** 's hyperlink to enter the policy’s main page (click the web browser’s **Back** button to return to the **Pending RPP Cancellation Form** report).
- Click the **--- Return to Reports** hyperlink to view return to the **Reports** page.
The following information is provided:
- Policy Number
- Insured Name
- Address
- Phone Number
- Language
- Status
- RPP Cancellation Request Date
- RPP Cancellation Form
- Notes

Click the bar to close the window and return to the entire Pending RPP Cancellation Form report.

Click the Policy #’s hyperlink to enter the policy’s main page (click the web browser’s Back button to return to the Pending RPP Cancellation Form report).

Click the [view/change] hyperlink to view or change the policy’s dashboard status.

The following will appear:
Use the **Status:** drop down box to select the dashboard status from the list provided:

- Left message
- Contact - Expecting action from customer
- Do not contact again - Insured elsewhere
- Do not contact again - Other
- No activity
- Phone disconnected or incorrect

Click the **[close]** hyperlink to close the window or click **save** to save any changes.

Saved entries can be viewed by clicking the **View/Create Note** hyperlink found on the policy’s main screen and in the **Dashboard Status** column of the **Pending RPP Cancellation Form** report.

Clicking the **[view]** across from **RPP Cancellation Form** will generate the RPP Cancellation Request Form which then can be printed. (see page 13)

Click **[view]** to view the policy’s notes screen.

The following screen will appear:

<table>
<thead>
<tr>
<th>Policy Notes -</th>
<th>AU</th>
<th>Date</th>
<th>Type</th>
<th>User</th>
<th>Note</th>
</tr>
</thead>
</table>

- Click **New Note** to enter a new policy note.
- Click **Return to Policy** to enter the policy’s main page.
- Click the web browser’s **Back** button to return to the **Pending RPP Cancellation Form** report.