

CAPITOL

PAYMENT PLAN



PREMIUM BILLING SYSTEM
a cloud based management solution

ADDITIONAL PREMIUM PROCEDURES

Agents will now have the ability to quote their own additional premiums. You will now be able to notify the insured of their new monthly payment amount. Follow these procedures in PBS to give an additional premium quote:

- Access AP quoting: In the top left of screen click on *QUOTING*. In the drop down menu click *NEW AP QUOTE* OR Click *AP QUOTING* in Quick Links. **DO NOT PRESS QUOTES**
- Enter the insured's CPP account number. Click *SEARCH*
- When the account information appears, click *NEXT* at the bottom of the page
- **IMPORTANT:** Click red link near the top of the page *ADD AP TO EXISTING POLICY*
- From the list of policies, click on the original policy
- On the policy screen enter the following required information
 1. Effective date of AP
 2. Premium of AP
- At bottom of page click *SAVE*
- Click *OK* in the message box then click *NEXT* at the bottom of the page
- Terms of the AP quote will appear. After reviewing click *SAVE* at the bottom of the page
- Click on the *SUMMARY* tab to view the summary of the AP
- Click *PRINT* at the bottom of the page to print the summary
- Issue draft payable to the carrier for the full amount of the AP
- Fax summary sheet and copy of draft to 818-610-7671