



User's Guide

BTIS DirectPay for Contractor General Liability is here! Manage your direct bill accounts online, anytime, anywhere.



This Guide

BTIS would like to welcome you to this brief User Guide for selecting and using BTIS DirectPay, our new direct billing option for Contractor General Liability. This guide is designed to help familiarize you with the process, features and options available.

At a high level you and your staff will be able to:

- Select the direct billing payment option and enter payment information
- View detailed account information
- Manage electronic notice delivery
- View and print reports, including: new accounts, pending cancellations, cancellations and reinstatements
- Enter check and credit card payments online for specific accounts
- View and print previously mailed documents

Additionally, your customers will be able to perform a variety of high-level account-management actions from anywhere!

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Binding Documents

Upon receiving the Binding Documents, you'll be asked to select a coverage option. You may also view the PDF Application and print a PDF Forms List.

Binding Documents

Kentucky Required Items

Submission ID: QAA01090700
Applicant Name: Jane Smith
DBA Name: Home Furnishings LLC

1. Please select from available coverage options:

- Occurrence Form (CG 00 01) \$2,165.00

2. Please select a payment option:

Please note: If you select BTIS DirectPay, you must fill out all information for that option and click the Save button, or your selections will not be saved.

- Direct Bill - BTIS DirectPay
Pay with ACH/Bank Account or Credit Card
1, 2, 5 and 10 Installment Options
Easily Add Your Broker Fee
- Pay in Full or Agency Finance
Pay by Check or Credit Card
Pay Online, eCheck is free of charge!
- Premium Fiance - Best Choice Premium Financing
Down Payment + 10 Monthly Payments
Available for Premiums \$325 and Above
Easily Add Your Broker Fee

To view the application, click [here](#) (PDF)

To view the forms list, click [here](#) (PDF)

Please remember that a policy is not bound until a binder is issued by BTIS!
Please forward all completed and signed forms (all pages) to bindrequests@btisinc.com or fax to 916.772.9292

Save

Selecting Direct Bill

After selecting your coverage option, you can now select Direct Bill as your payment option.

Once you select BTIS DirectPay, you may elect to include a broker fee.

1. Please select from available coverage options:

- Occurrence Form (CG 00 01) \$2,165.00

2. Please select a payment option:

Please note: If you select BTIS DirectPay, you must fill out all information for that option and click the Save button, or your selections will not be saved.

- Direct Bill - BTIS DirectPay
 - Pay with ACH/Bank Account or Credit Card
 - 1, 2, 5 and 10 Installment Options
 - Easily Add Your Broker Fee
- Pay in Full or Agency Finance
 - Pay by Check or Credit Card
 - Pay Online, eCheck is free of charge!
- Premium Fiance - Best Choice Premium Financing
 - Down Payment + 10 Monthly Payments
 - Available for Premiums \$325 and Above
 - Easily Add Your Broker Fee

3. Add your broker fee here:

- If a broker fee is not applicable, please leave as 0

Please note: broker fee amount cannot be changed once the binding documents are saved

4. Please select a payment plan:

One Pay - \$2175.00 (includes fully earned fees and applicable taxes)

- Pay Now
- Zero Down - scheduled 21 days from effective date

Two Pay - \$1167.50 Initial payment, 1 remaining payments of \$1017.50 due monthly

- Pay Now
- Zero Down - Initial payment scheduled 21 days from effective date

Selecting a Payment Plan

You may now select a payment installment, which allows you to customize the payment amount and frequency.

Your client may elect to put "Zero Down" or "Pay Now".

If they choose "Zero Down", the initial payment will be drafted 21 days from the policy effective date.

If they choose to "Pay Now", the payment will typically be drafted within 24-72 hours.

for that option and click the Save button, or your selections will not be saved.

- Direct Bill - BTIS DirectPay
 - Pay with ACH/Bank Account or Credit Card
 - 1, 2, 5 and 10 Installment Options
 - Easily Add Your Broker Fee
- Pay in Full or Agency Finance
 - Pay by Check or Credit Card
 - Pay Online, eCheck is free of charge!
- Premium Fiance - Best Choice Premium Financing
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- Pay Now
- Zero Down - scheduled 21 days from effective date

Two Pay - \$1167.50 Initial payment, 1 remaining payments of \$1017.50 due monthly

- Pay Now
- Zero Down - Initial payment scheduled 21 days from effective date

Five Pay - \$563.00 Initial payment, 4 remaining payments of \$413.00 due monthly

- Pay Now
- Zero Down - Initial payment scheduled 21 days from effective date

Ten Pay - \$361.50 Initial payment, 4 remaining payments of \$211.50 due monthly

- Pay Now
- Zero Down - Initial payment scheduled 21 days from effective date

Paying by Credit Card

Upon choosing the payment installment plan, the applicant's information will show for confirmation.

The email address is required so that instructions can be sent to the insured.

By default, the Credit Card option will be selected as a payment option. Simply enter the payment details and check the acknowledgment that you have read and agreed to the Terms and Conditions.

You may also choose to select ACH/Bank Account as the payment method.

Important Note: If you navigate away from this page without clicking on "Save", the DirectPay information will be lost and the Binding Documents will immediately be reset.

Quote #	<input type="text" value="QAA01028571"/>
Applicant Name	<input type="text" value="Duncan Keith"/>
DBA Name	<input type="text" value="Dynasty League Inc"/>
Applicant Email	<input type="text" value="btisqa@gmail.com"/>
Payment Method	<input checked="" type="radio"/> Credit Card <input type="radio"/> ACH/Bank Account

Card Type	<input type="text"/>
Card Number	<input type="text"/>
Expiration Date	<input type="text"/> <input type="text"/>
Security Code	<input type="text"/>
Name on Card	<input type="text"/>
Address	<input type="text"/>
City	<input type="text"/>
State	<input type="text"/>
Zip Code	<input type="text"/>
Payment Plan	<input type="text"/> 1st Installment <input type="text"/>

I have read and agreed to the [Terms and Conditions](#)

Important Information:

- Producer commissions will be paid directly by the billing company
- Only US banks are accepted
- All fees are earned at binding
- A billing fee of \$10 is applied to each installment
- There is a \$50 reinstatement fee for cancelled policies
- A late fee of \$10 will be added to your account if payment is received after the installment due date
- A charge of \$25 will be assessed for any returned payment, regardless of reason
- Notice of Cancellation will be sent immediately after installment due date if payment is not received

To view the application, click [here](#) (PDF)

To view the forms list, click [here](#) (PDF)

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ACH Payment Method

If you choose the ACH/Bank Account option, the payment details necessary for processing will appear. Simply enter the information and click "Save."

Important Note: If you navigate away from this page without clicking on "Save", the DirectPay information will be lost and the Binding Documents will immediately be reset.

Important Note: [Important Information](#) and [Cancellation Terms](#) listed below may not apply to the Admitted product in California.

Quote #	<input type="text" value="QAA01028571"/>
Applicant Name	<input type="text" value="Duncan Keith"/>
DBA Name	<input type="text" value="Dynasty League Inc"/>
Applicant Email	<input type="text" value="btisqa@gmail.com"/>
Payment Method	<input type="radio"/> Credit Card <input checked="" type="radio"/> ACH/Bank Account

Bank Name	<input type="text"/>
Routing Number	<input type="text"/>
Account Number	<input type="text"/>
Account Type	<input type="radio"/> Checking <input type="radio"/> Savings
Name on Account	<input type="text"/>
Payment Plan	<input type="text"/> 1st Installment <input type="text"/>
<input type="checkbox"/>	I have read and agreed to the Terms and Conditions

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Save

Submission and Confirmation

Once you have clicked "Save", and the payment information has been submitted, you will see the red confirmation text at the bottom thanking you for your Direct Bill submission.

Click the "Close" button and you have finished submitting for BTIS DirectPay.

Important Note: [Important Information](#) and [Cancellation Terms](#) listed below may not apply to the Admitted product in California.

Quote #	QAA01028571
Applicant Name	Duncan Keith
DBA Name	Dynasty League Inc
Applicant Email	btisqa@gmail.com

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Close

Thank you! Your Direct Bill payment information has been submitted.

Login Page

www.btisdirectpay.com

The BTIS DirectPay Login Page allows you to enter your unique username and password that was provided to you upon set up in our DirectPay system. If you do not have a username or password or misplaced it, please email the following:

brokersupport@input1.com

Important Note: In an effort to prevent unauthorized access to your account information, the email request must come from an agency principal or an authorized contact that you have established within your agency.

btis | DirectPay

Complete Billing Management

View, manage and pay instantly!

Securely login to view information on existing accounts and run reports.

Agent Login
Agents

Customer Login
Customers

Home Page

The Home Page provides you with a variety of options to both manage and view your DirectPay accounts.

Accounts/Customer Service

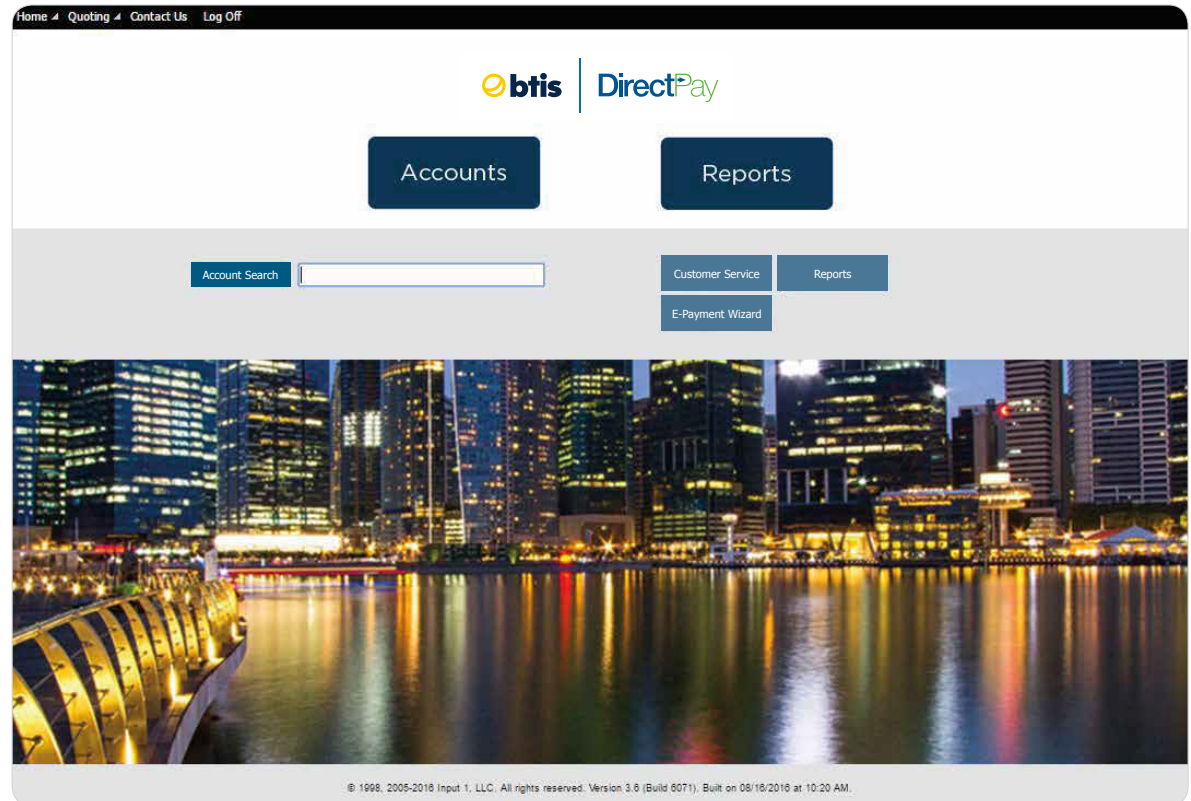
Allowing you access to view any and all accounts placed through the program.

Reports

Option to run a variety of reports on your business, anytime, anywhere.

Account Search

If known, enter a specific account to gain access to detailed account information.



Accounts/Customer Service

Users can search for an account in a variety of ways using the Basic or Advanced Search options.

Basic – Enter the known criteria into any of the fields listed below and click Search.

Susan Johnson | View Print Activity
 Home Quoting Contact Us Log Off

PDS Premium Billing System

Customer Service - Search

Account #: Name: Serial #:
 Address: City: Policy #:
 Region: Postal Code: Pymt Amt Rcvd:
 Include Archived Accounts Advanced... Search

Account No	Name	Address	City	Region	APs
1112-59	Costco	2873 N. Hwy 121	Dallas	TX	0
1112-42	Yellow Taxi Cabs	344 Cantell Ave	New York	NY	0
1112-34	Thomas Jones Trucking Co	263 D Ave	Los Angeles	CA	0
1112-26	BlackHawk Inc	1234 South Main Street	Thousand ...	CA	0

4 Items ← 1 →

Show Imported Account Numbers

Accounts/Customer Service

Advanced – The Advanced searching tool allows you to enter more than one set of criteria to help you define your search, i.e. list all accounts with a total premium greater than or equal to \$1,000 with a customer city of Los Angeles.

The screenshot displays the 'Customer Service - Search' interface in the PDS Premium Billing System. The search criteria are set to 'Total Premium: >= 3500' and 'Customer City: Los Angeles'. A dropdown menu is open, showing a list of fields to search by, including 'Billing Method', 'Created By', 'Customer Address Region', 'Customer Agent', 'Customer Contact Info', 'Customer ID', 'Customer Name', 'Customer Postal Code', and 'Customer Street Address'. The search results table shows 6 items with columns for 'Account No', 'Name', 'Region', and 'APs'.

Account No	Name	Region	APs
1087-4515	Test Account	les CA	0
1087-4143	Endurance R	les CA	0
1087-4002	Test Account	les CA	0
1087-3905	Test Account	les CA	0
1087-2444	STEVEN REED	les CA	0
1087-174	TESTING RET	E... CA	0

Customer Service Window

The main customer service screen provides your agency with a tremendous amount of account detail and tools to use.

Numerous tabs at the top allow your agency to review pertinent and detailed account information including:

- Account Summary
- Customer Information
- Policies Placed on the account
- Payments
- Documents
- Notice Delivery

PBS Premium Billing System

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Customer Service - 1112-42 - Yellow Taxi Cabs

Account Number: 1112-42 Account Name: Yellow Taxi Cabs Current / Active

Summary | Customer | Policies | Terms | Payments | Documents | Notice Delivery

Customer Information		Summary Financials	
Account Number:	42	Total Premium:	6,100.00
Account Holder:	Yellow Taxi Cabs	Down Payment: (19.672 %)	1,200.00
Main Address:	344 Cantell Ave New York, NY 12046	Unpaid Balance	4,900.00
Main Phone:	123-345-5555	No. of Installments:	10
Agent:	A00002 - Insurance Agency	Original Installment Amount	490.00
Received Date:	--	Installments Made/Remaining:	0 / 10
Creation Date:	7/28/2016	Next Installment Amount:	490.00
Created By:	melinda kinnisch	Next Late Fee Amount:	5.00
Effective Date:	2/10/2016	Shortage:	0.00
Archive Date:	--	Auto Assessed Late Fee Breakdown	
Balance Due Date:	--	Account Balance (inc. fees):	4,900.00
		Current Amount Due:	2,450.00
Next Intent Date:	7/28/2016		
Scheduled Cancellation Date:	8/11/2016		
Cancellation Hold Date:	--		
Next Reinstatement Date:	--		
Next Late Fee Date:	7/28/2016		
First Due Date:	3/10/2016		
Next Due Date:	3/10/2016		
Final Due Date:	12/10/2016		
Last Intent Date:	--		
Last Cancellation Date:	--		
Last Reinstatement Date:	--		

Audit Log Pay Now Account Options... Edit Close

Customer Service Window/Documents Tab

The documents tab inside the Customer Service Window allows you to choose, retrieve, view and print previously generated notices and letters on a specific account. Once you've selected the notice you wish to retrieve, a yellow bar will appear at the top letting you know the document is ready for viewing.

PBS Premium Billing System

Frank Johnson | View Print Activity

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Customer Service - ABC-99259 - Testig Disbursement

Your document is now ready. Please click here to open it.

Account Number: ABC-99259 Account Name: Testig Disbursement Current / Active

Summary Customer Policies Terms Payments Documents Notice Delivery

Title	Description	Method	Creator	Date Created	Pages
Welcome Letter		Day End	PbsSystemAccount	9/27/2017	2
Intent to Cancel		Day End	PbsSystemAccount	9/27/2017	4

3 Items

Generate Notice:

Pending Re-generations: Notice

No notice has been scheduled to re-generate at day-end.

Upload Document:

Audit Log Pay Now Account Options... Edit Close

Reports

The system provides you a number of standard reports which can be run anytime. After selecting the report you wish to run from the list on the left, a selection of additional report criteria may be available for you to modify the report even further.

Example: A Pending Cancellation Report can be run for one or multiple related office locations and for a time period that you specify.

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Reports

Reports

- Cancellation Hold Report
- Canceled and Reinstated Report
- Disbursement Report
- Epayment Report
- Missing Policy Report
- New Account By Policy Report
- New Business Confirmation Report
- Pending Cancellation Report

Pending Cancellation Report

Run Now

Specific Agent(s): Insurance Agency - A00002

Date Range Type: Date Range

Scheduled Cancellation Date Range

Begin Date: 7/29/2016

End Date: 8/7/2016

Group By: No Grouping

Sort By: Cancellation Date

Missing Policy Numbers Only

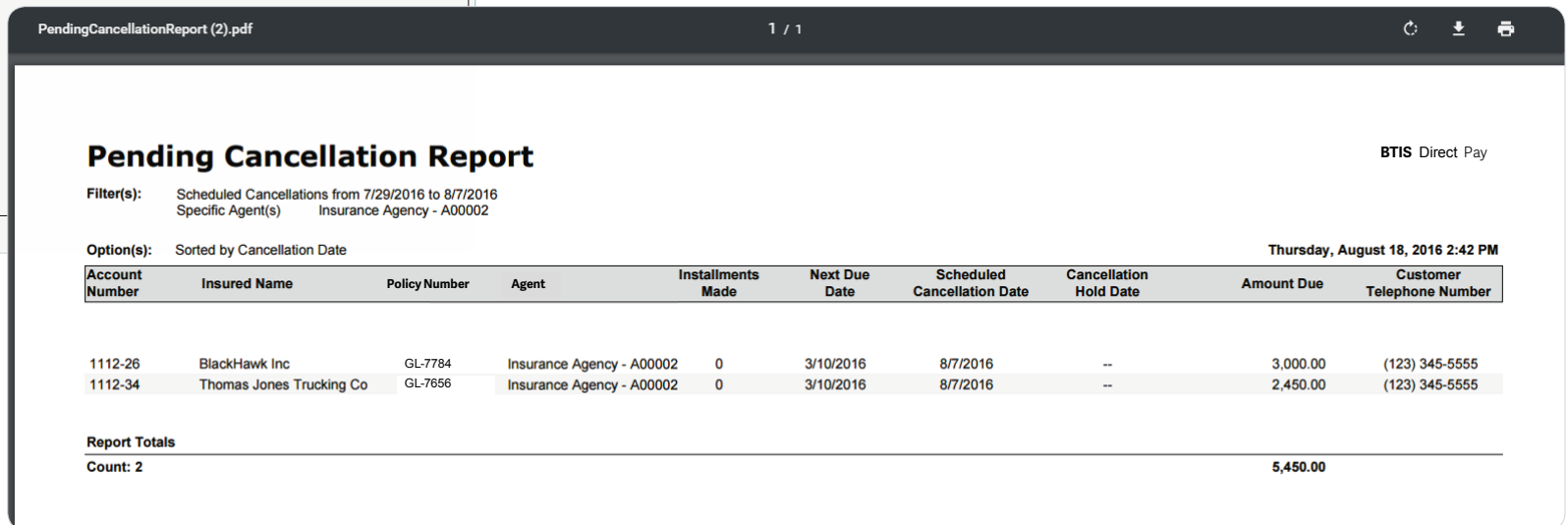
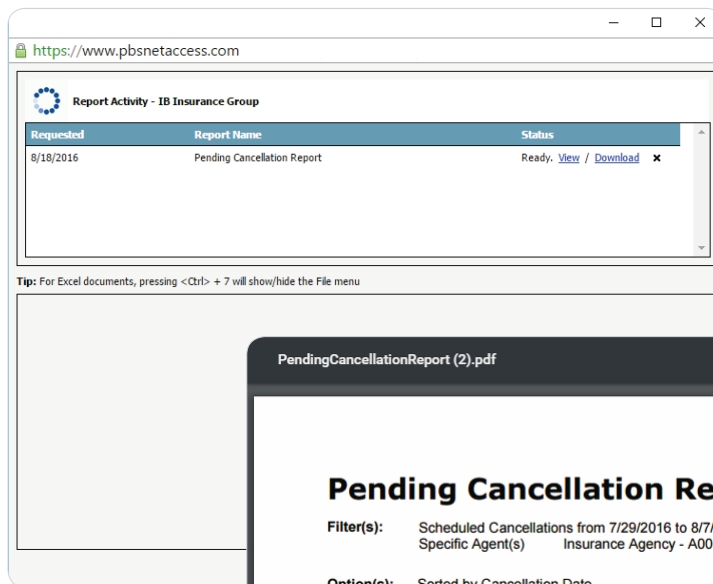
Totals Only

The report lists accounts that are approaching their scheduled cancellation date for a Entity or Entities. The report will not include archive account information.

PDF

Reports

After you have selected to run the report, a Report Activity box appears that allows you to view the report on screen or download as a PDF.



Passwords

You have the ability to change your password to the system at any time.

BTIS

PBS Premium Billing System

Susan Johnson | View Print Activity

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Change My Password

Password Rules:
In order to protect your security, this site has certain rules for choosing passwords. Please look at the following list so that you will know how to choose a good password.

All passwords have to be at least 6 characters long, cannot contain any part of the login name, and must contain three of the following four elements:

- lowercase letters
- uppercase letters
- numbers
- non-alphanumeric characters (i.e. #!\$)

Change Password

Old Password:

New Password:

Confirm New:

Update

Insured Access

Every Accountholder will also receive a Welcome Letter upon set up of their account if they chose DirectPay. This letter will contain details for accessing their account online to perform the following:

- View account summary information
- Make individual Credit Card and ACH/Bank Account payments online (Additional Fees will apply)
- Change passwords
- View policy detail
- View and print previously mailed documents

PDS Premium Billing System

1112-42 - Yellow Taxi Cabs

Select an Option	Account Summary
Account Summary	Account #: 1112-42
Payment History	Name: Yellow Taxi Cabs
Change Personal Info	Address: 344 Cantell Ave New York, NY 12046
Change Password	Agent: Insurance Agency
Make E-Payment	Account Status: Current
View Policy Summary	Installments Made: 0
Documents	Installments Remaining: 10
Change ACH Info	Next Payment Due On: 3/10/2016
	Current Amount Due: 2,450.00
	Intent to Cancel Date: 7/28/2016
	Scheduled Cancellation Date: 8/11/2016 Pay Now
	Account Balance: 4,900.00

BTIS DirectPay
6200 Canoga Avenue, Suite 400
Suite 400
Woodland Hills, CA 91367

Phone/Fax: 888-494-4222

WELCOME LETTER

Statement Date	12/15/2016
Effective Date	12/22/2016
Account No.	1112-42

ABC Concrete
344 Cantell Ave
Sacramento, CA 95814

To our Valued Customer:

We would like to take this opportunity to thank you for choosing BTIS for your insurance needs.

Should you have any questions, please contact one of our Customer Relations Specialists at (888) 123-1234, Monday through Friday between the hours of 6:00am and 5:00pm PST/PDT.

To access your account online, visit us at www.BTISDirectPay.com.

Your Account Number is: 1112-42
Your Username is: 111242
Your Password is: Re445L23, unless you have changed it.

By using our online system, you can see your payment history, check your next due date, make a payment and perform many other helpful tasks.

Thank you for your business. We look forward to serving you.

Sincerely,









BTIS DirectPay

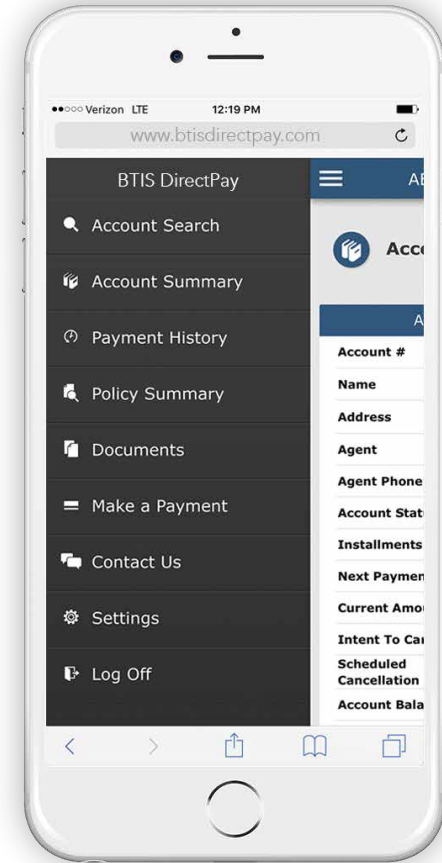
INSURANCE POLICY(IES) RELATING TO THIS NOTICE

Policy No.	Insurance Carrier	Type of Coverage	Premium
XXX12345678	Security National	GL	1,500.00

Mobile Web Application

The Mobile Web App provides you and your customers a convenient and easy way to manage your account information in the palm of your hand. Users can access their accounts, view account summaries, monitor their payment history, make payments and much more.

- 
Account Search
 Find any account at any time.
- 
Account Summary
 All the account detail you need.
- 
Payment History
 A complete view of payments.
- 
Policy Summary
 Your need-to-know info.
- 
Documents
 Retrieve any document.
- 
Make a Payment
 Anywhere payments.
- 
Contact Us
 Provide faster access to service.
- 
Settings
 Portfolio access for all types of users.





Customer Care

(888) 494-4222

Email: BTIS-directpay@input1.com

Account Information

Visit the website, www.btisdirectpay.com, and enter your login credentials.

Address

Physical: 6200 Canoga Avenue, Suite 400,
Woodland Hills, CA 91367