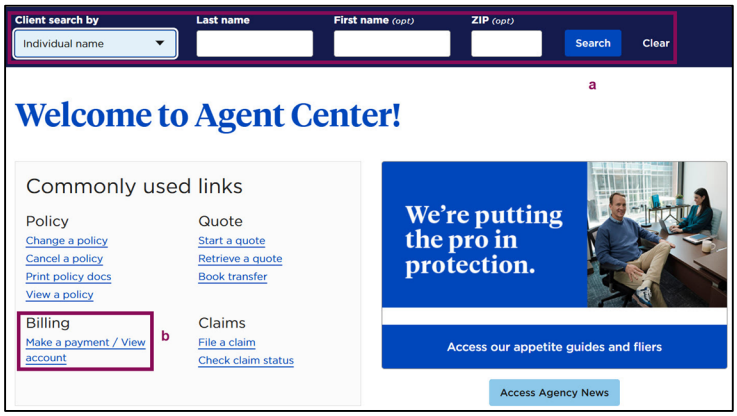
Make a Payment

Personal Lines | Job Aid

Description

This job aid provides detailed instructions for making payments through Agent Center, including guidance on handling payments for specific policies, account-level transactions, Agency Sweep and collections.

Step 1

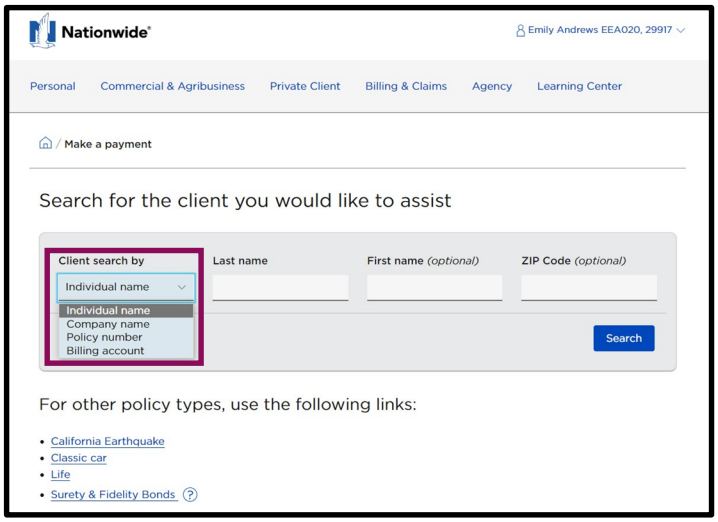
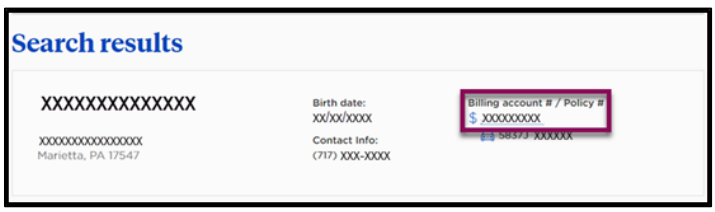
Action	Screen
There are several ways to make a payment: a. From the drop-down, select how you want to search for your customer and select “Pay bill.” Proceed to Step 3. b. From the commonly used links > under the Billing section > select “Make a payment/View account.” Proceed to Step 2.	

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Step 2

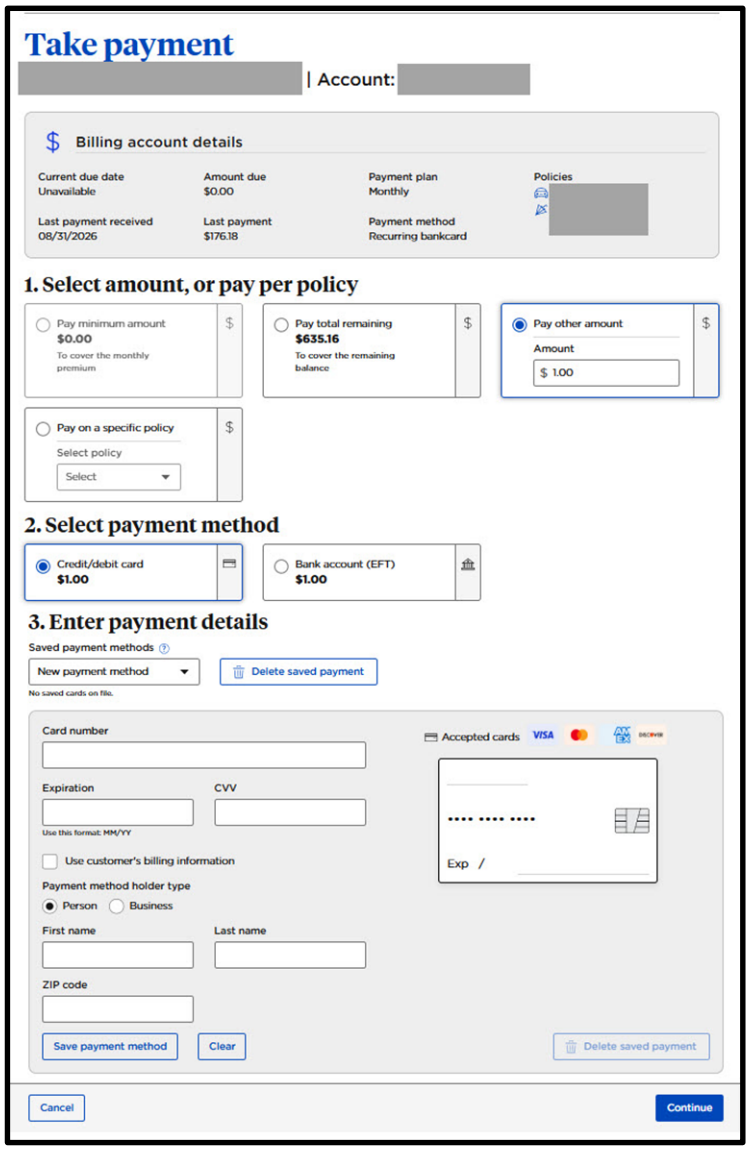
Action	Screen
Select how you want to search. • Complete the required information and select the “Search” button • The “Search results” will be displayed. You will be able to see the account information. Then, select “Select billing account” • Then you need to select the billing account number associated with policies the customer would like to make a payment upon	  

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Step 2

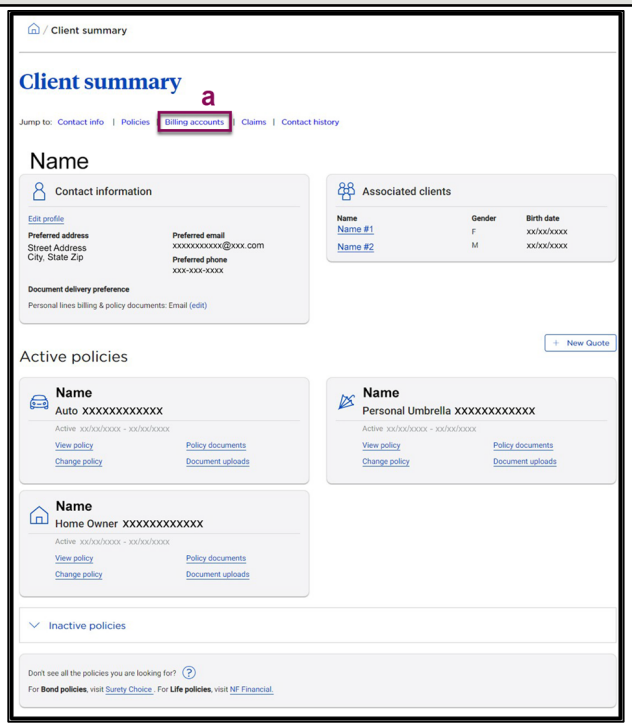
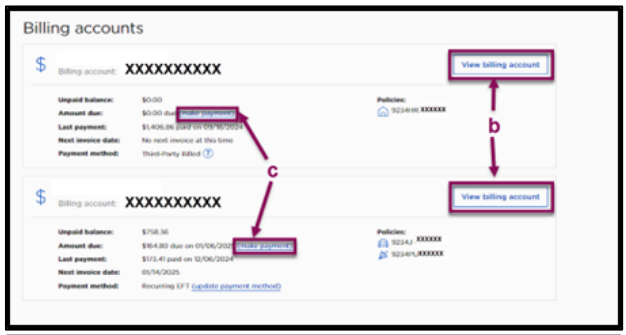
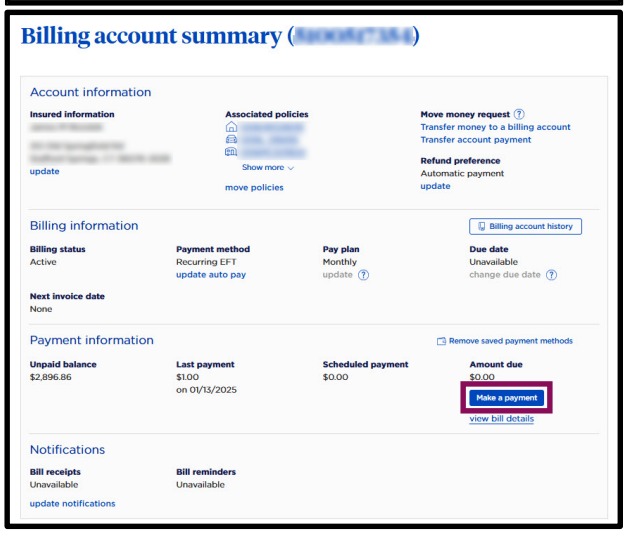
Action	Screen
• This takes you to the “Take payment” screen • Then proceed to Step 4	

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Make a Payment

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Step 3

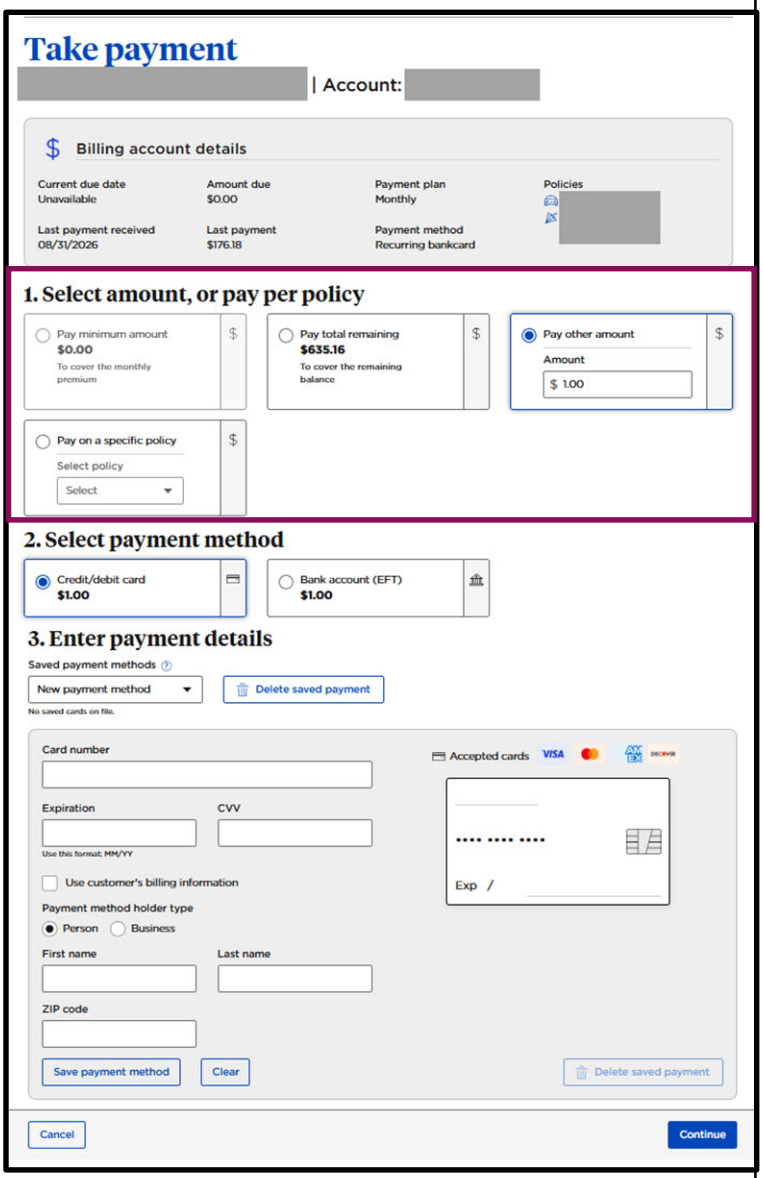
Action	Screen
The client summary displays. There are multiple ways to get to the “Take payment” screen. a. Through the “Billing accounts” tile/ “Billing Account Summary”/ “Make Payment” Scroll down the page to “Billing accounts” b. In the “Billing accounts”, select “make payment” OR c. Select “View billing account” Selecting “b” or “c” will take you to the “Billing account summary”. Select “Make a payment” to complete your transaction. Proceed to Step 4.	  

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Step 4

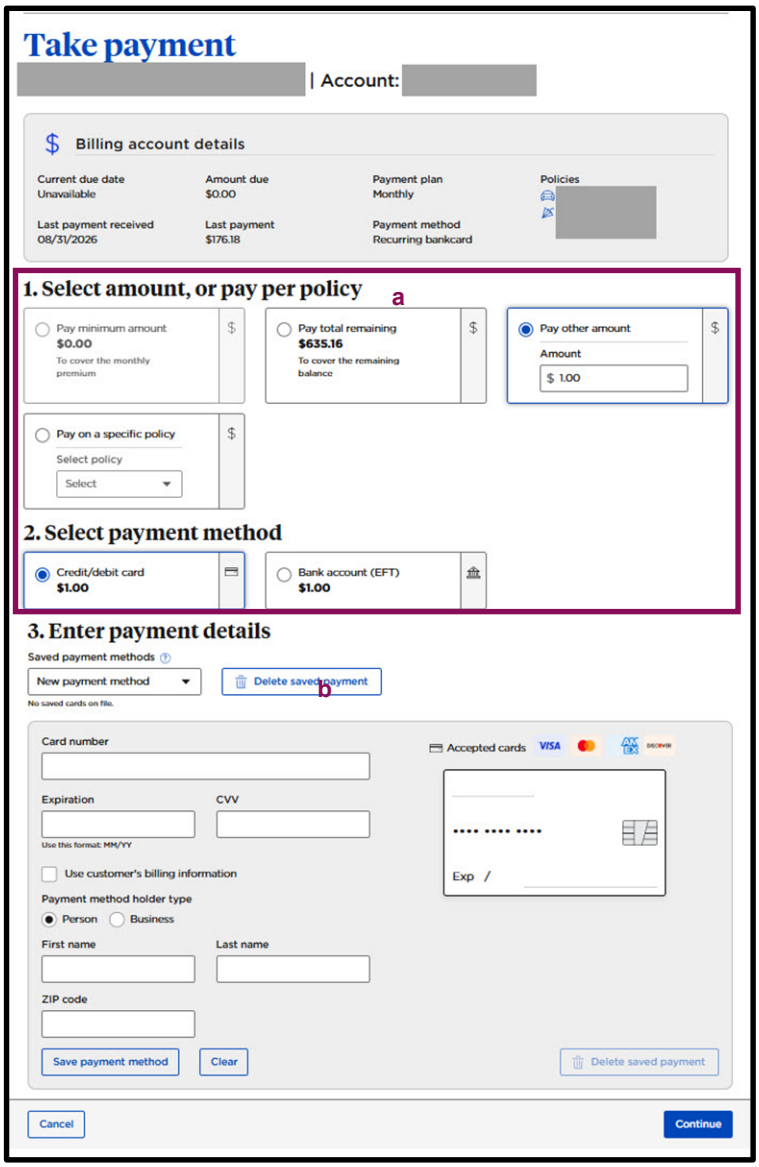
Action	Screen
The “Take payment” screen displays with the billing account. **If there is more than one policy on an account, it is recommended to take the payment at account level by choosing the "Pay minimum amount" tile or "Pay total remaining” tile.** Agent Center Billing knows to spread the payments to each policy. To pay on a specific policy, choose the policy from the tile drop-down. **Note:** Policy-level payment should be made if: • Only one of the policies is past due (currently in non-pay status) OR • The customer wants to pay more than the minimum and they would like the overpayment to be applied to a specific policy If you choose account-level to pay, any overpayment will go to the account or toward future bills. **Note:** If the account or policy is in “Cancelled” status and has a collection amount due, you can make a payment on it. If there is no collection amount and you try to make an account-level payment for a cancelled billing account, you will receive messaging that no payment can be accepted. You will then need to contact the Service Center.	

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Make a Payment

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Step 5

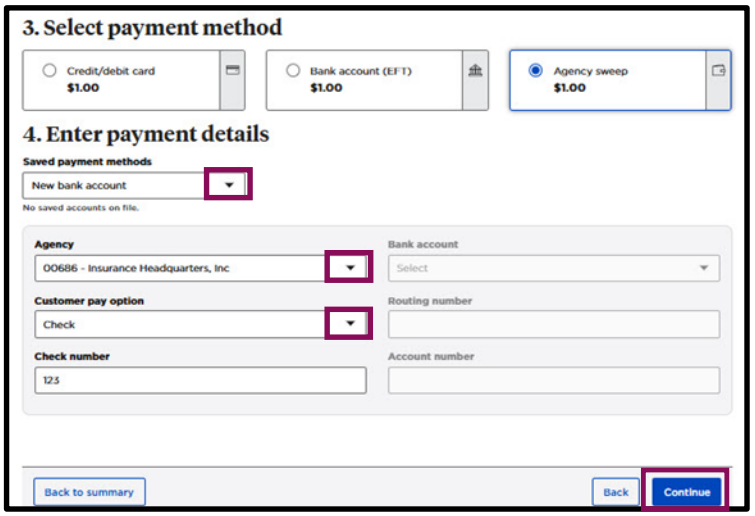
Action	Screen
If you choose Policy-Level to pay, options for minimum or total balance due are displayed. Any overpayment will go to the policy balance only. Once you have selected where you want the money to be applied, the next question you will need to answer is “Select amount or pay per policy.” a. To make a payment, select “Pay minimum amount”, “Pay total remaining” or “Pay other amount” (Ex: The customer would like to pay more than the minimum amount.) b. Choose how you want to pay, either: i. Agency sweep (continue to Step 6a) ii. Credit/Debit card (continue to Step 6b) iii. Bank Account - EFT (continue to Step 6c)	

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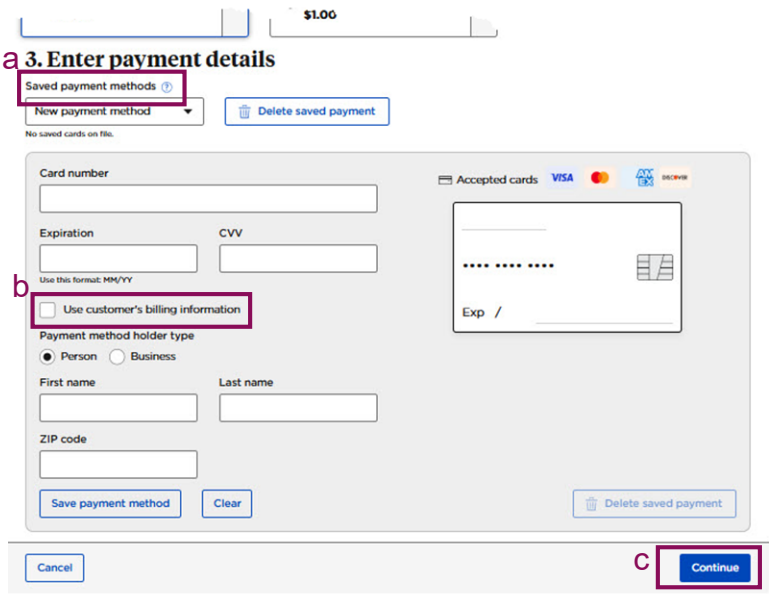
Make a Payment

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Step 6a – Agency Sweep

Action	Screen
If you have set up an Agency Sweep account with Nationwide, you can select your account from the agency account drop-down. You can accept cash, check or money order payment. Complete the appropriate fields and select the “Continue” button.	

Step 6b – Credit/Debit Card

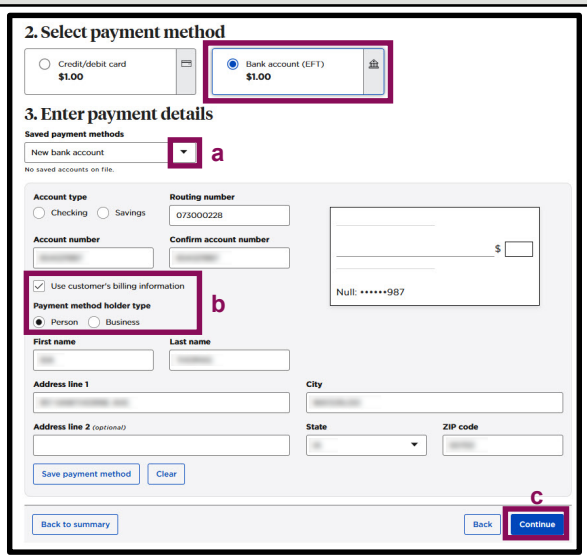
Action	Screen
Next enter payment details. a. You can select a saved credit/debit card or input a new card number. b. To "Use the customer’s billing information”, select the checkbox. The billing information automatically prefills the billing information on record. OR Complete the credit card information. c. Select the “Continue” button. Nationwide accepts the following credit cards: ✓ Visa ✓ MasterCard ✓ Discover ✓ American Express	

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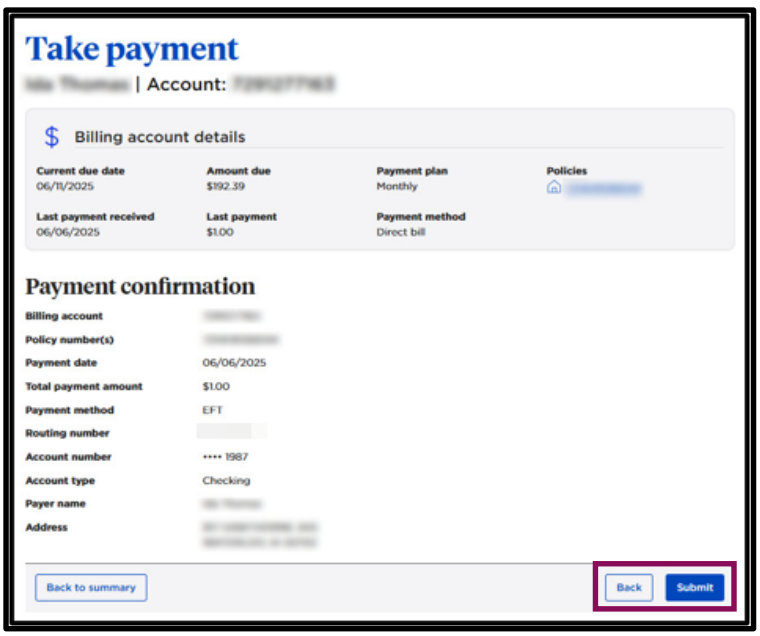
Make a Payment

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Step 6c – Bank Account (EFT)

Action	Screen
The “Bank account (EFT)” screen displays. a. You can select a saved bank account from the bank account drop-down or enter new banking information. b. To "Use the customer’s billing information”, select the checkbox. The billing information automatically prefills the billing information on record. OR Complete the bank account information. c. Select the “Continue” button.	

Step 7 – Payment Confirmation

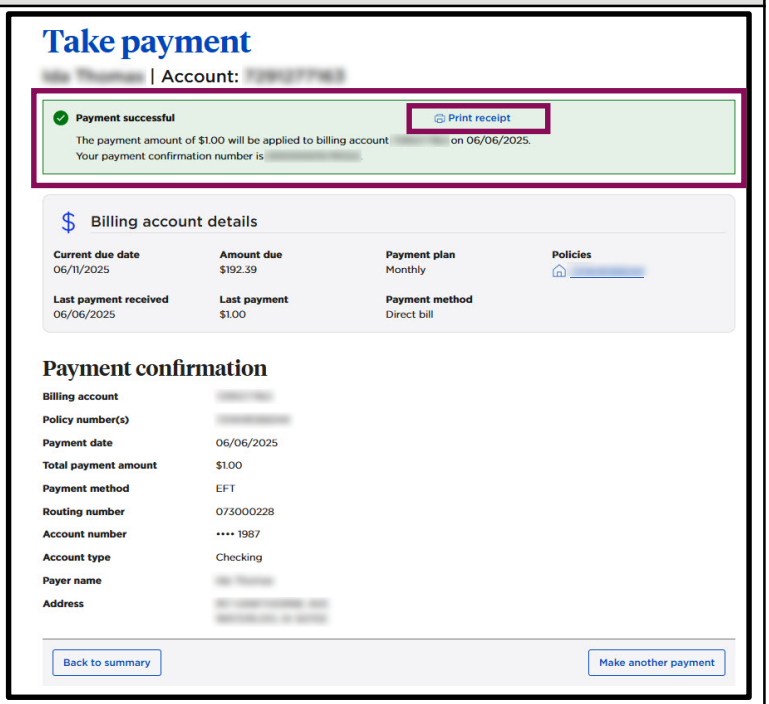
Action	Screen
A “Payment confirmation” screen displays specifics on the amount and account information for all payment types. If inaccurate information is found, select the “Back” button. If the information is accurate, select the “Submit” button.	

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Step 8 – Successful Payment Message

Action	Screen
A successful transaction message displays with a confirmation number and a button to print the receipt. **IMPORTANT -** Print the receipt and retain the information for your records. **Note:** Once you leave the Pay Bill page, the transaction message with the “View Receipt” link will no longer display. Select the “View Receipt” link in Billing Account History to display the Conditional Receipt. It provides basic payment information, date submitted, account number, amount received, type of payment, insured information, agent and approval code. Print and retain the information for your records. If you're made aware a payment is going to return (but it hasn't yet), please contact the Service Center for guidance on how to handle the transaction.	

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