



DirectPay

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

Card Type		
Card Number		
Expiration Date		
Security Code		
Name on Card		
Address		
City		
State		
Zip Code		
Payment Plan		1st Installment

☐ 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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Save

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		

Important Information:

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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

Important Information:

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Please forward all completed and signed forms (all pages) to bindrequests@btisinc.com or fax to 916.772.9292

Close

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

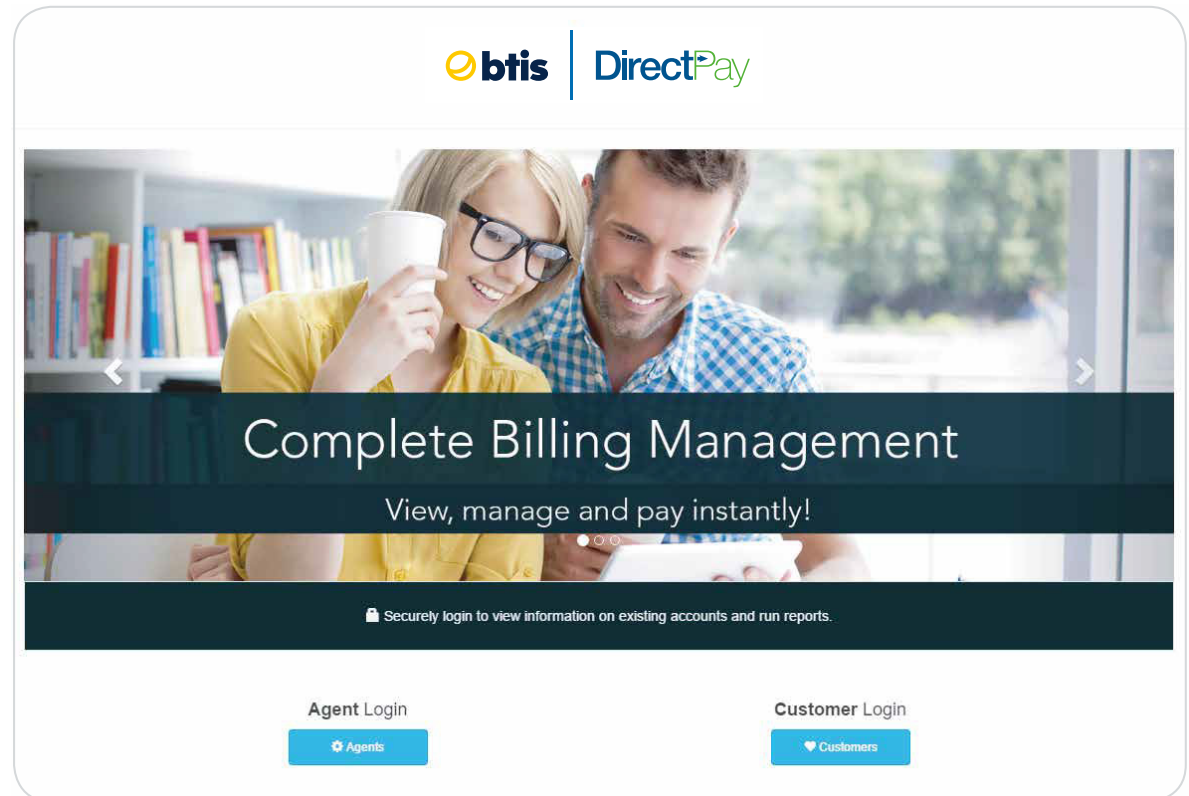
Login Page

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.



Home Page

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

Accounts/Customer Service

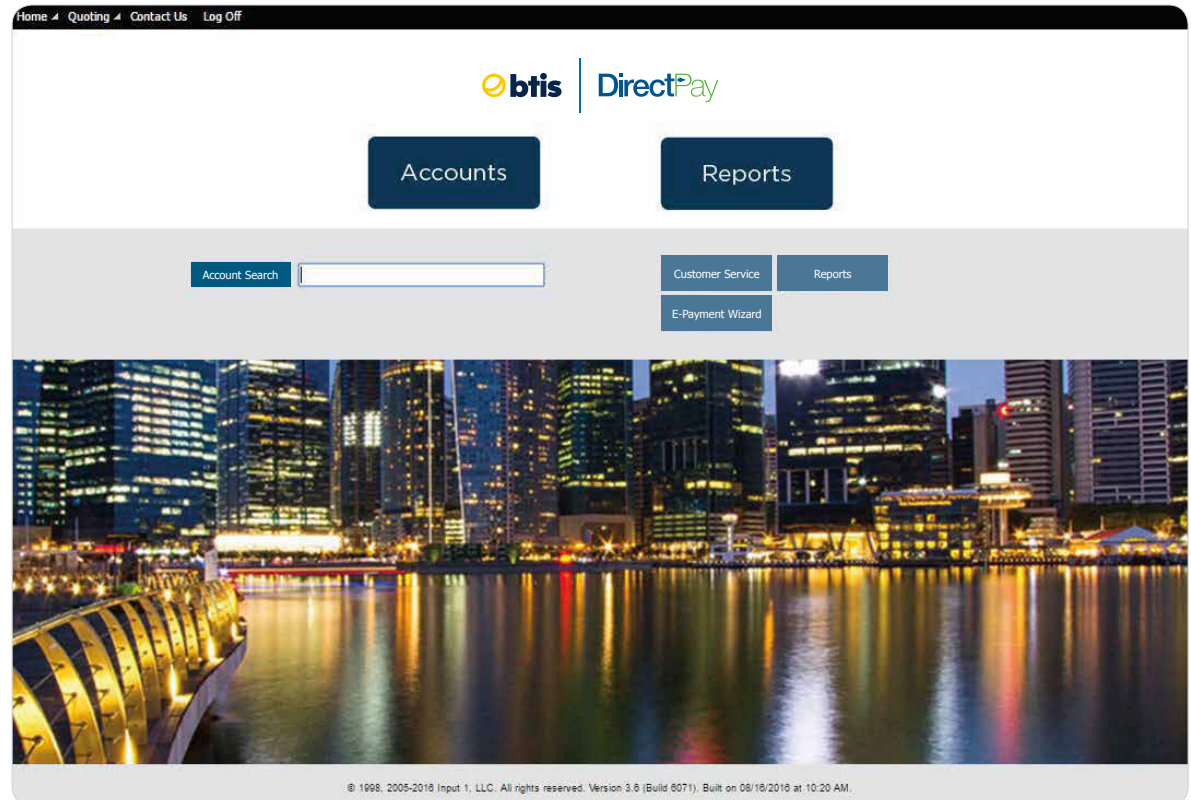
Allowing you access to view any and all accounts placed through the program.

Reports

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

Account Search

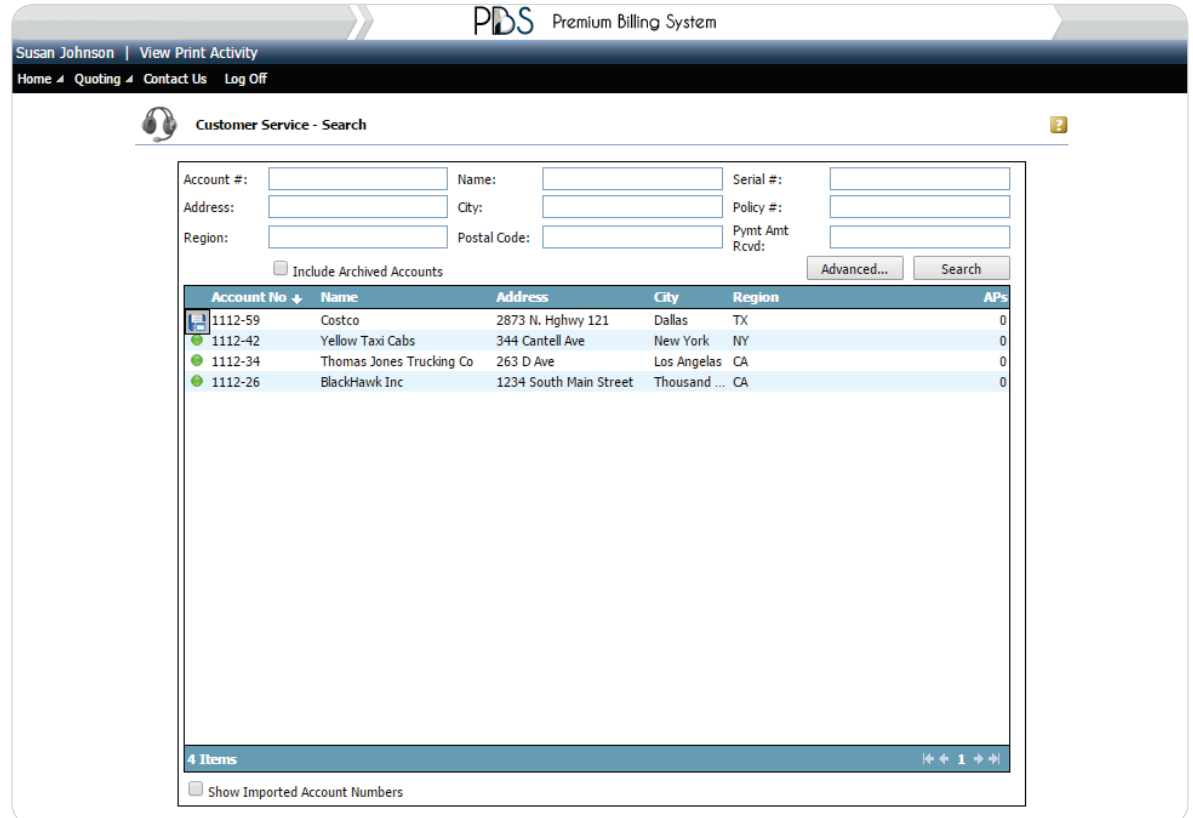
If known, enter a specific account to gain access to detailed account information.



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.



The screenshot shows the 'Customer Service - Search' interface in the PDS Premium Billing System. The interface includes a header with the user's name 'Susan Johnson' and a 'View Print Activity' link. Below the header is a navigation bar with links for 'Home', 'Quoting', 'Contact Us', and 'Log Off'. The main search area contains several input fields for 'Account #', 'Name', 'Serial #', 'Address', 'City', 'Policy #', 'Region', 'Postal Code', 'Pymt Amt', and 'Rcvd'. There are also checkboxes for 'Include Archived Accounts' and buttons for 'Advanced...' and 'Search'. Below the search fields is a table with the following data:

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

At the bottom of the table, it indicates '4 Items' and provides pagination controls. Below the table is a checkbox labeled '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.

PBS Premium Billing System

Chris Farfaras | View Print Activity

Customer Service - Search

All Portfolios

Account No	Name
1087-4515	Test Account
1087-4143	Endurance R
1087-4002	Test Account
1087-3905	Test Account
1087-2444	STEVEN REED
1087-174	TESTING RET

Total Premium: x

Customer City: x

Add Search Field... ☐ Include Archived Accounts Basic... Search

Billing Method

Created By

Customer Address Region

Customer Agent

Customer Contact Info

Customer ID

Customer Name

Customer Postal Code

Customer Street Address

Region	APs
les CA	0
les CA	0
les CA	0
les CA	0
les CA	0
E... CA	0

6 Items


☐ Show Imported Account Numbers

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


Premium Billing System

Susan Johnson | View Print Activity

Home Quoting Contact Us Log Off


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

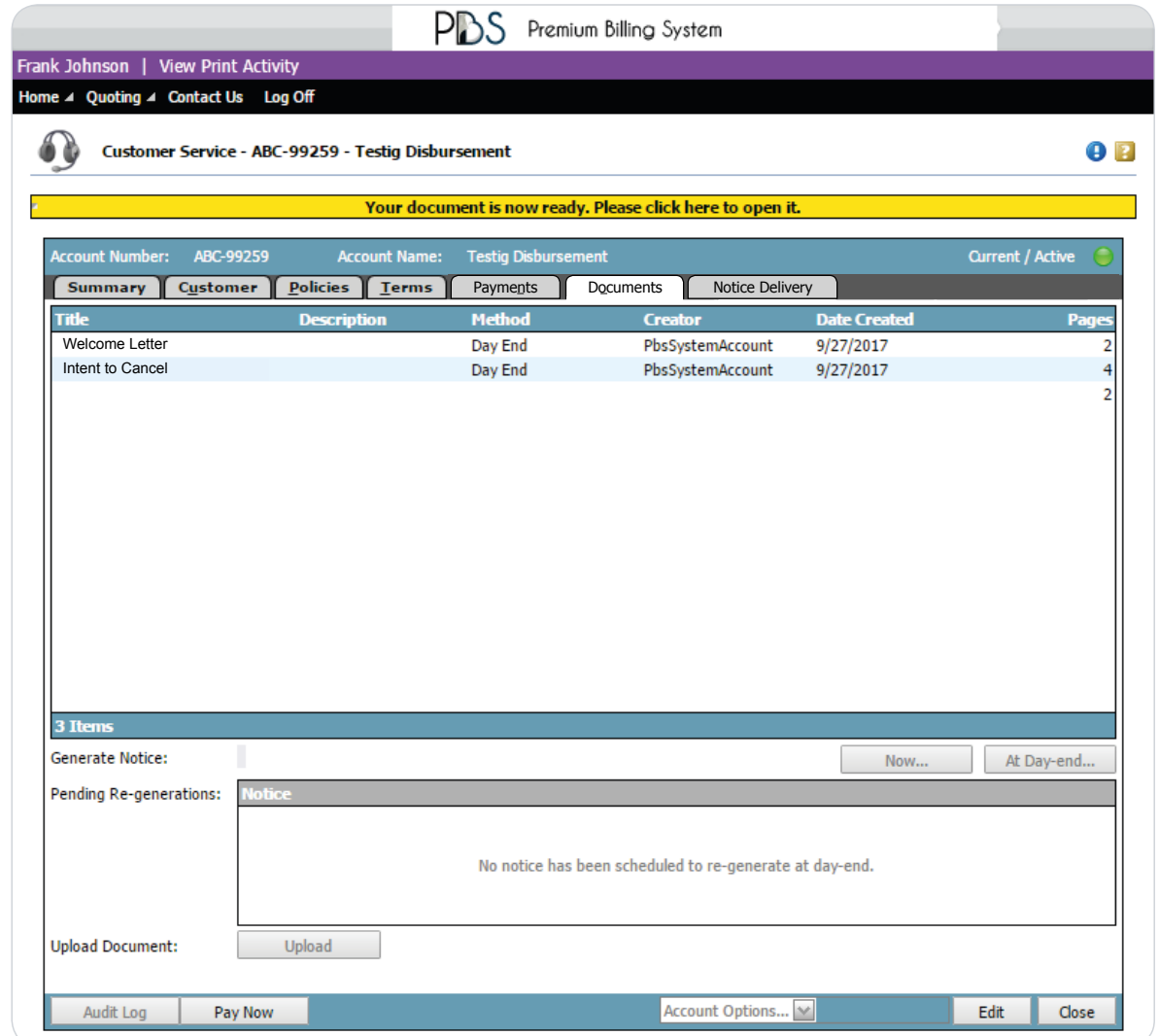
Audit Log
Pay Now

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.



The screenshot shows the PDS Premium Billing System interface. At the top, it says "PDS Premium Billing System". Below that, a purple bar contains "Frank Johnson | View Print Activity". A navigation bar includes "Home", "Quoting", "Contact Us", and "Log Off". The main header is "Customer Service - ABC-99259 - Testig Disbursement". A yellow notification bar states: "Your document is now ready. Please click here to open it." Below this, a tabbed interface shows "Documents" selected. The account information is "Account Number: ABC-99259" and "Account Name: Testig Disbursement". The "Documents" tab displays a table with the following data:

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
					2



Below the table, there are sections for "Generate Notice:" with "Now..." and "At Day-end..." buttons, and "Pending Re-generations:" with a "Notice" box containing the text "No notice has been scheduled to re-generate at day-end." At the bottom, there is an "Upload Document:" section with an "Upload" button. The footer includes "Audit Log", "Pay Now", "Account Options...", "Edit", and "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.

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


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

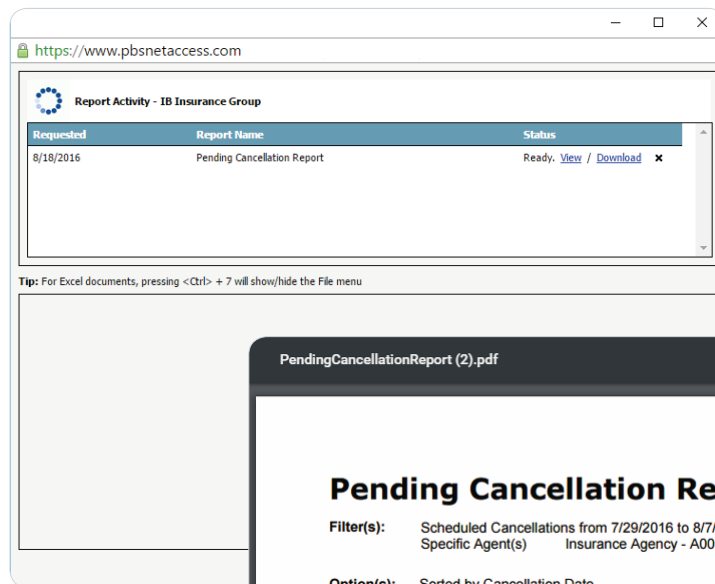
Specific Agent(s): Insurance Agency - A00002
Date Range Type: Date Range
Scheduled Cancellation Date Range
Begin Date: 7/29/2016
End Date: 8/7/2016
Group By: No Grouping
Sort By: Cancellation Date
☐ Missing Policy Numbers Only
☐ Totals Only

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 Run

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.



PendingCancellationReport (2).pdf 1 / 1

Pending Cancellation Report BTIS Direct Pay

Filter(s): Scheduled Cancellations from 7/29/2016 to 8/7/2016
Specific Agent(s) Insurance Agency - A00002

Option(s): Sorted by Cancellation Date Thursday, August 18, 2016 2:42 PM



Account Number	Insured Name	Policy Number	Agent	Installments Made	Next Due Date	Scheduled Cancellation Date	Cancellation Hold Date	Amount Due	Customer Telephone Number
1112-26	BlackHawk Inc	GL-7784	Insurance Agency - A00002	0	3/10/2016	8/7/2016	--	3,000.00	(123) 345-5555
1112-34	Thomas Jones Trucking Co	GL-7656	Insurance Agency - A00002	0	3/10/2016	8/7/2016	--	2,450.00	(123) 345-5555
Report Totals									
Count: 2								5,450.00	

Passwords

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

BTIS
PDS Premium Billing System

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


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. #!\$)

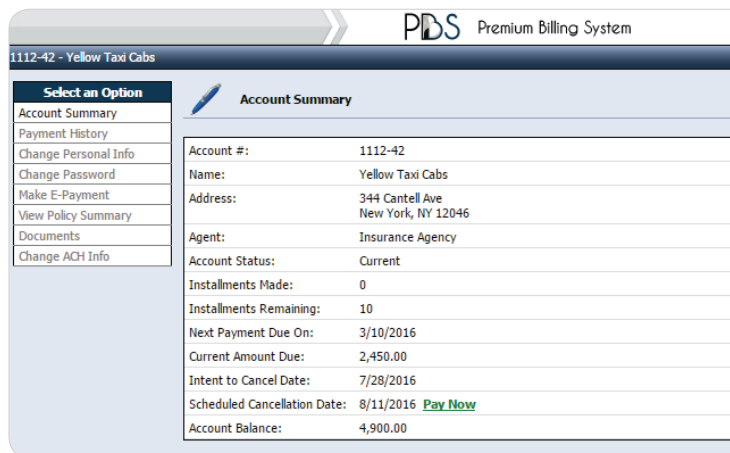
Change Password

Old Password:
New Password:
Confirm New:

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

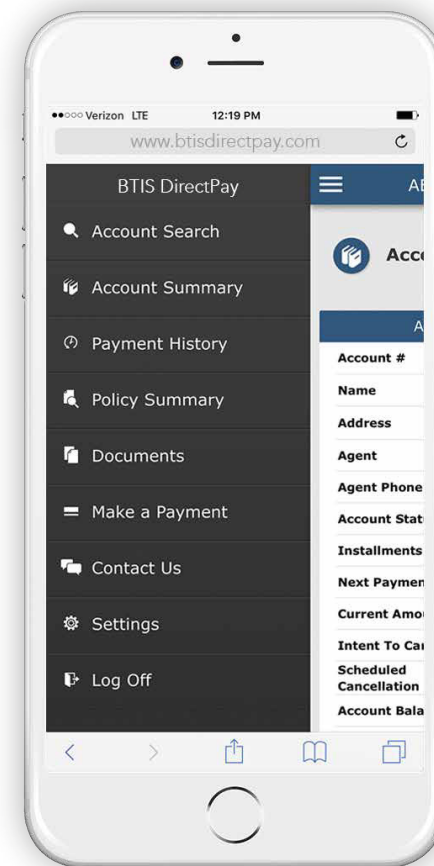
INSURANCE POLICY(IES) RELATING TO THIS NOTICE

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