

February 27, 2012

accessHarleysville//CL® enhancement:

Streamlined policy issuance—automatic setup of direct bill with a 9-pay payment plan option

Thanks to your feedback, effective immediately, we have enhanced the policy issuance process for commercial lines accounts issued through the *accessHarleysville//CL*® rating system by enabling you to set up billing more quickly! As a result, now you have the option of automatic setup of direct bill with a 9-pay payment plan at the end of the policy issuance process. This new feature, when selected, eliminates your having to set up the billing, as our system does the work for you. This enhancement applies to all direct bill insured accounts regardless of premium and to those lines of business, shown below, which can be bound through *accessHarleysville//CL*:

- StarAdvantage® Businessowners Programs
- Commercial Auto Policies
- Harleysville CustomPak® Policies
- *Monoline* General Liability Policies
- Commercial Workers Compensation Policies

For accounts within binding authority, the system automatically will determine if the account is eligible for direct bill. If that is the case, you can choose to: 1) have the system set up direct bill with a 9-pay payment plan automatically, or 2) click on **Billing Options** to set up specific billing criteria yourself.

[GET THE FULL DETAILS WITH SCREENSHOTS >>>>](#)

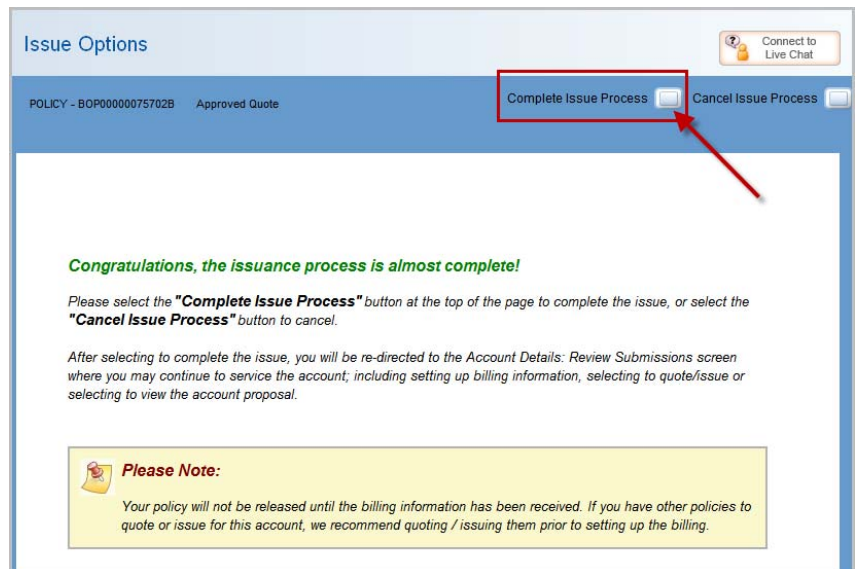
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Your guide to:

Automatic setup of direct bill with a 9-pay payment plan

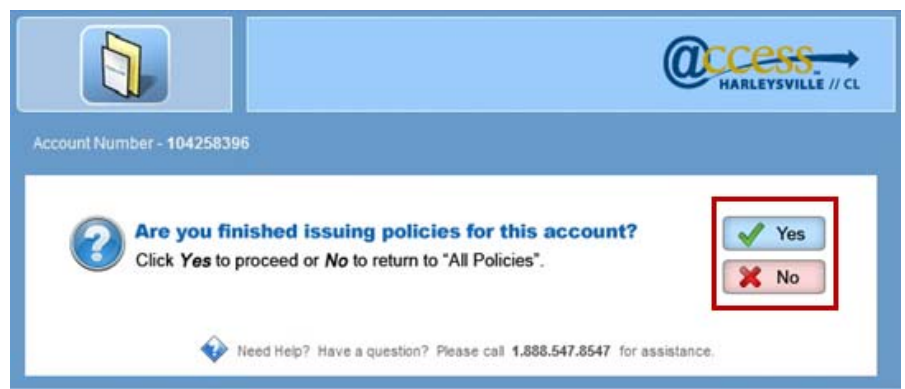
The following instructions are for those accounts within binding authority.

- From the **Issue Options** page, click **Complete Issue Process**.



- A pop-up window will display and ask, "**Are you finished issuing policies for this account?**" Click **Yes** to proceed or **No** to return to the "**All Policies**" page.

NOTE: Your policy will not be released until the billing information has been completed. If you have other policies to quote or issue for the same account, we recommend quoting/issuing them prior to setting up the billing.



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Upon clicking **Yes**, a pop-up window will display.

- A.** To select direct bill with a 9-pay payment plan, click the **OK** button to accept. The system automatically will create the billing for the account and all available "issued" policies. The system will then go to the agent portal **Account Details > Policies > Policy Detail** tab.

NOTE: Payer information will be same as insured unless **Other Bill to/Payer Information** was entered during the account setup process.

OR

- B.** If the account has specific billing needs, click the **Billing Options** button to proceed to the **Billing Account Setup** screen.

REMINDER: For accounts with a primary location in Connecticut, Maryland, New Hampshire or Pennsylvania, you will be required to enter the name of the producer. If the producer name is not entered, you will not be able to complete the **Billing Setup** and the policies under the account will not issue.

Questions? Call the Harleysville customer contact center toll-free at 1.888.547.8547 (option 2).

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