

Enrolling in Autopay: A Step-by-Step Guide





How to Do it

We will guide you through each step to help you set up autopay, a convenient service that enables you to make automatic payments securely. Let's begin!

1. To start, log in to your account in <u>My Portal</u>.

pacific specialty	Need help? Call us 800 303 5000
	Username Producers enter username. Customers enter email. Next Vor Dart have an Account? Roducer.Signup Roducer.Signup Med help signing in?

2. Once you have logged in, click on Policy Management.





3. Choose Manage policy and proceed to edit policy.

Policy me	anagemen	it				
Reset G	O Agency view	Products v	Location ~	oducers v Polic	y status 🗸	
Reference ID	<u>≓</u> Name	- Address	Program 📰	Policy term	Treated by Tr	Policy status 📻 Action
Containe.		1000			1000	
						Policy summary
						🚯 Make a payment
						Policy documents
						itern text

4. Choose the Billing information option. Locate the toggle switch and set it to YES. After making your selection, simply follow the on-screen instructions or prompts provided.

Billing information	
Enrolled in autopayment	
Please, select the default payment to enroll in autopayment or add a new one ① You must have a default payment method when enrolled in autopayment.	
Add new payment method 🕘	
Save	



5. Add a new payment method. Fill in the required details. Make sure to double-check the accuracy of the information before proceeding.

Payment method		
Add new payment method		
Credit/Debit card Bank account	it	
The billing address is different than the property address	NO	
Use the policyholder's name		
Card holder		
Card number	(j)	
Expiration date		
Select	Ē	
Set as default payment method.	© w	e'il use this for your policy plan and renewal syments.

6. Click on the Save button to store your new payment method securely. This will allow you to use it for future transactions.

Billing infor	mation	Payment method has been updated successfully.
Enrolled in autopayment	t vis	
Please, select the default payment to enroll in outop	bayment or add a new one	
MasterCard **** 8055 Defoult Peter Robertson Bood theu 05/24	● <u> </u>	
Add new payment me	nthod 🕁	



What to Do if you Have Multiple Payment Methods

1. Keep the default payment method selected and click on Save to confirm your choice.

		Billing inforr	nation		
		Enrolled in autopayment	t	YES	
	Please, select Master Peter Rober Good thru 0	Card **** 8055 (Default) tson 5/24	ayment or add a new o	2 (2)	
	O Amex Savannah I Good trhu I	**** 21001 Iguyen 9/22	4	<i>2</i> 22222 2 (3)	
	Add new po	syment method 🕀			
		Save			
Policy summary			NOTES	O The succ	changes have been saved esfully.
Policy status	^	Policy term	^	,	roena, A2, 89003
Status Per	nding info	Effective date	09/22/2022	s	\$200 .00 per month 2.400. 00 per year
Effective date Of	9/22/2023	Expiration date	09/22/2023		
Billing information	^	Vesting information	tion ^		
Enrolled in autopayment	Yes	Peter Robertson, a married ma and separate property.	ın, as his sole		
Payment method Credit / D	Debit card	Edit 🖉			
Edit 2	ý	👂 Payment inform	ation ~		
		Third party inter	est ~		
Coverages	Ĩ	Discounts	~		
Valuables	Ŷ				
Insured information	~				



Switching to a Different Payment Method

1. Choose a different payment method.

< Goback	rmation	
Please, select the default payment to enrol in a	autopayment or odd a new on	ves 🔵
MasterCard **** 8055 (Default) Peter Robertson Good thru 05/24	2	•
Amex **** 21001 Savannah Nguyen Good trivu 10/22	2	<i>812</i> 823 (2)
Add new payment method 🕀		
Save		

2. Switch to another available payment method.

Billing informat	tion	
Enrolled in autopayment	YES	
Please, select the default payment to enroll in autopayment or	r add a new one	
MasterCard **** 8055 (Default) Peter Robertson Good thru 05/24	• 2 8	
Savannah Nguyen Good trhu 10/22		
Add new payment method		



3. Save



olicy summary	NOTES (a) The changes have been succesfully.	n saved
Policy status	Policy term ^ Your plan	
Status Pending Info	Effective date 09/22/2022 \$2200.00 per m \$2.400.00 per year	onth
Effective date 09/22/2023	Expiration date 09/22/2023	
Cancel policy 🛞	Edit 🖉	
Billing information ^	Vesting information	
Enrolled in autopayment Yes	Peter Robertson, a married man, as his sole and separate property.	
Payment method Credit / Debit card	Edit 🖉	
Edit 🖉	Payment information ~	
Contact preferences V	🕅 Third party interest 🗸 🗸	
🔮 Coverages 🗸 🗸		
	Discounts v	
📷 Valuables 🗸 🗸		
Insured information 🗸 🗸		

Congratulations! You have completed the process.



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