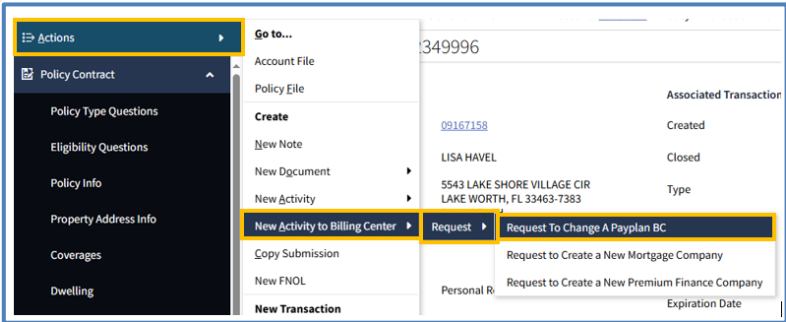




Requesting Payment Plan Change

What	How to request a change to a Payment Plan
Who	Agents who need to request a change to the payment plan
When	Anytime the current payment plan needs to be changed to a different payment schedule

Procedure Follow these steps to request a change to a payment plan.

Step	Action
1	Access the policy in PolicyCenter.
2	Create an activity requesting the change to the payment plan. Caution: Payment Plans can only be changed once during a policy term. - Click Actions. - Place your cursor over the New Activity to Billing Center option. - Move cursor to Request sub-menu. - Select Request to Change A Payplan BC.  Result: The New Activity workspace opens.

Continued on next page



Requesting Payment Plan Change, continued

Procedure,
continued

Step	Action								
3	Indicate the desired Pay Plan option in the Description field. Activity Activity New Activity OK Cancel Link Document Subject * Robert Request To Change A Payplan BC Description * Enter new payment plan (Full Pay, Semi Annual, Quarterly). NOTE: This activity is not applicable for bound submissions pending payment or for changing the Billing Method (see the PolicyCenter job aid for Changing a Payment Plan). <table border="1"><thead><tr><th>If the desired Pay Plan option is ...</th><th>Then...</th></tr></thead><tbody><tr><td>Quarterly</td><td> - Delete the instructions and the Change to Semi-Annual Pay Plan option. </td></tr><tr><td>Semi-Annual</td><td> - Delete the instructions and the Change to Quarterly Pay Plan option. </td></tr><tr><td>Full Pay</td><td> - Delete the instructions and Pay Plan options. - Enter Change to Full Pay Plan. </td></tr></tbody></table> Activity Activity New Activity OK Cancel Link Document Subject * Robert Norberg - Request To Change A Payplan BC Description * Change to a Full Pay Plan Result: The desired Pay Plan option remains in the Description field.	If the desired Pay Plan option is ...	Then...	Quarterly	Delete the instructions and the Change to Semi-Annual Pay Plan option.	Semi-Annual	Delete the instructions and the Change to Quarterly Pay Plan option.	Full Pay	- Delete the instructions and Pay Plan options. - Enter Change to Full Pay Plan.
If the desired Pay Plan option is ...	Then...								
Quarterly	Delete the instructions and the Change to Semi-Annual Pay Plan option.								
Semi-Annual	Delete the instructions and the Change to Quarterly Pay Plan option.								
Full Pay	- Delete the instructions and Pay Plan options. - Enter Change to Full Pay Plan.								

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Requesting Payment Plan Change, continued

Procedure,
continued

Step	Action
3, Con't	• Select General in Topic drop-down menu. • Add a subject in the Subject field. • Add a note in the Text field indicating the request. The note below is for documentation in Policy Center only New Note Topic <none> Subject Request to Change Payment Plan Related To * ---- Renewal : 37231600 (2025-03-12) Text • Click OK to submit the request to BillingCenter. Activity Activity New Activity OK Cancel Link Document Subject * Robert Norberg - Request To Change A Payplan BC Description * Change to a Full Pay Plan Result: The request is sent to BillingCenter and the note is available in PolicyCenter.

End of procedure