



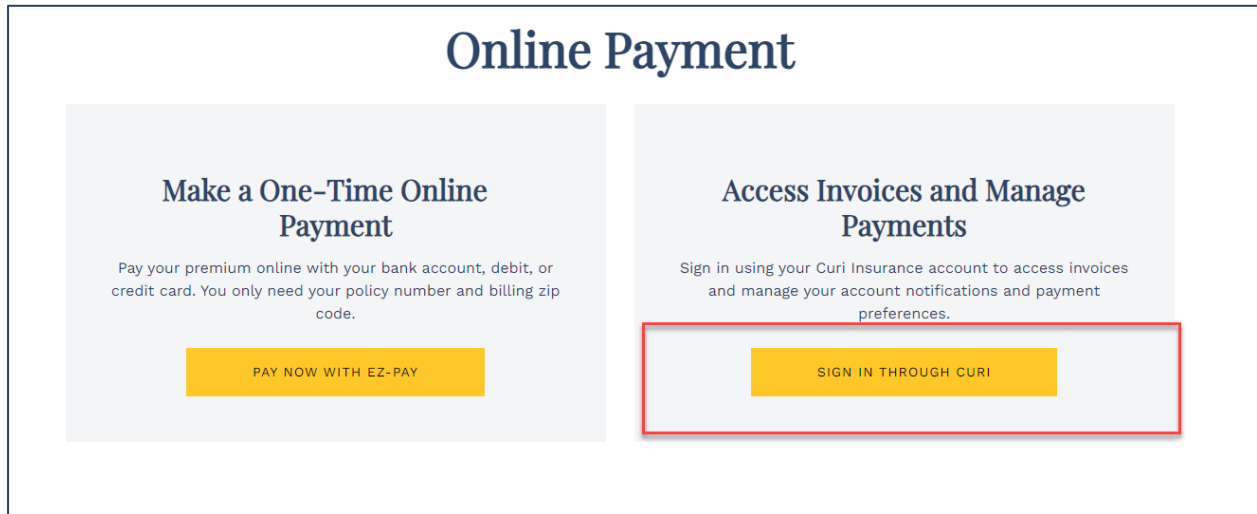
## How to Set up AutoPay

You can access your payment account via our website at [www.curi.com](http://www.curi.com). You will log in to the website using your existing Curi credentials. If you do not have a login for the Curi website, one can be created using the “Register as a new user” link under the “Sign In” tab at the top right-hand side of the Curi homepage.

Once you are logged in, click on the “Pay Insurance Premium” Icon located under the “All Curi Resources” page.

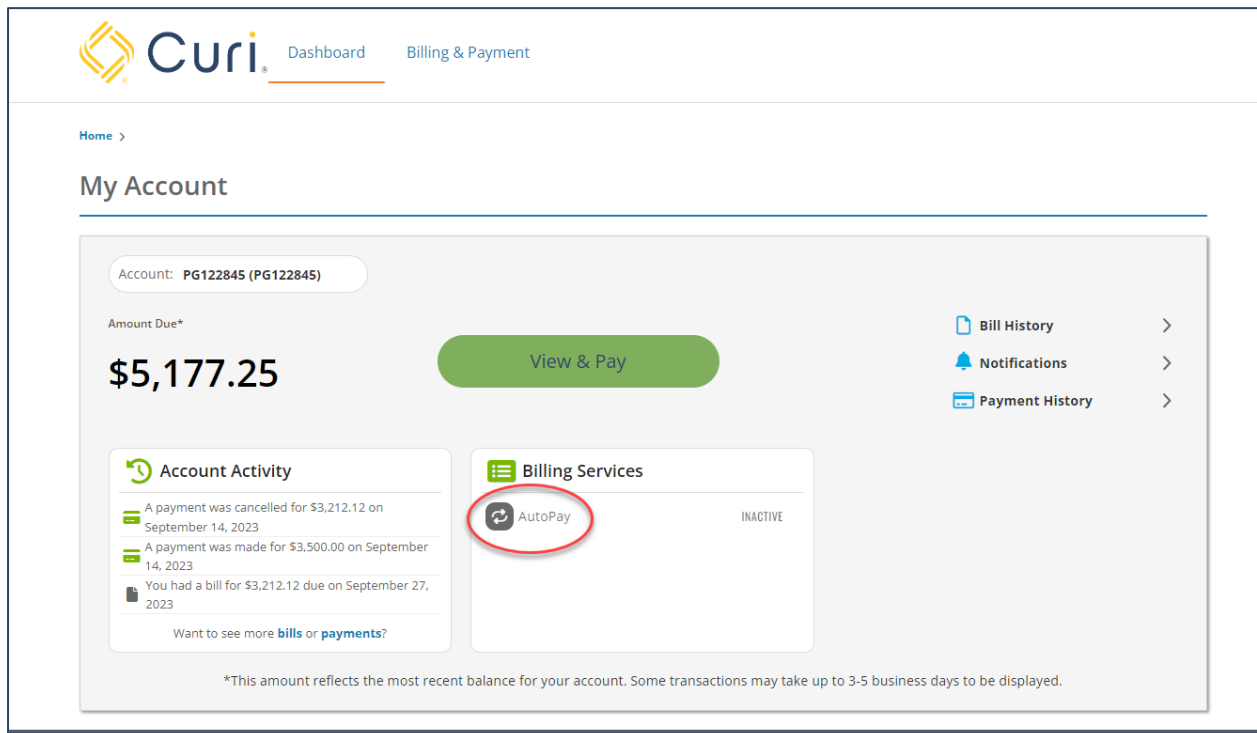
A screenshot of the Curi website's "All Curi Resources" page. The page has a dark blue header with the Curi logo and navigation links: ADVISORY, CAPITAL, INSURANCE, NEWS &amp; KNOWLEDGE, a search icon, and an "AP" icon with a dropdown arrow. Below the header, the text "CURI INSURANCE" is visible, followed by the main heading "All Curi Resources". A paragraph states: "Your membership with Curi means you have access to key tools and resources that we provide. Click any of the following items to access the most important resources for you and your practice." Below this is a section titled "POLICY MANAGEMENT" with an upward arrow. Three cards are displayed: "Policyholder Services (PHS)" with a description of managing policy information; "Pay Insurance Premium" which is circled in red and describes an online payment portal; and "Underwriting Forms" which describes forms available for download by state.

Next, click on “Access Invoices and Manage Payments”.



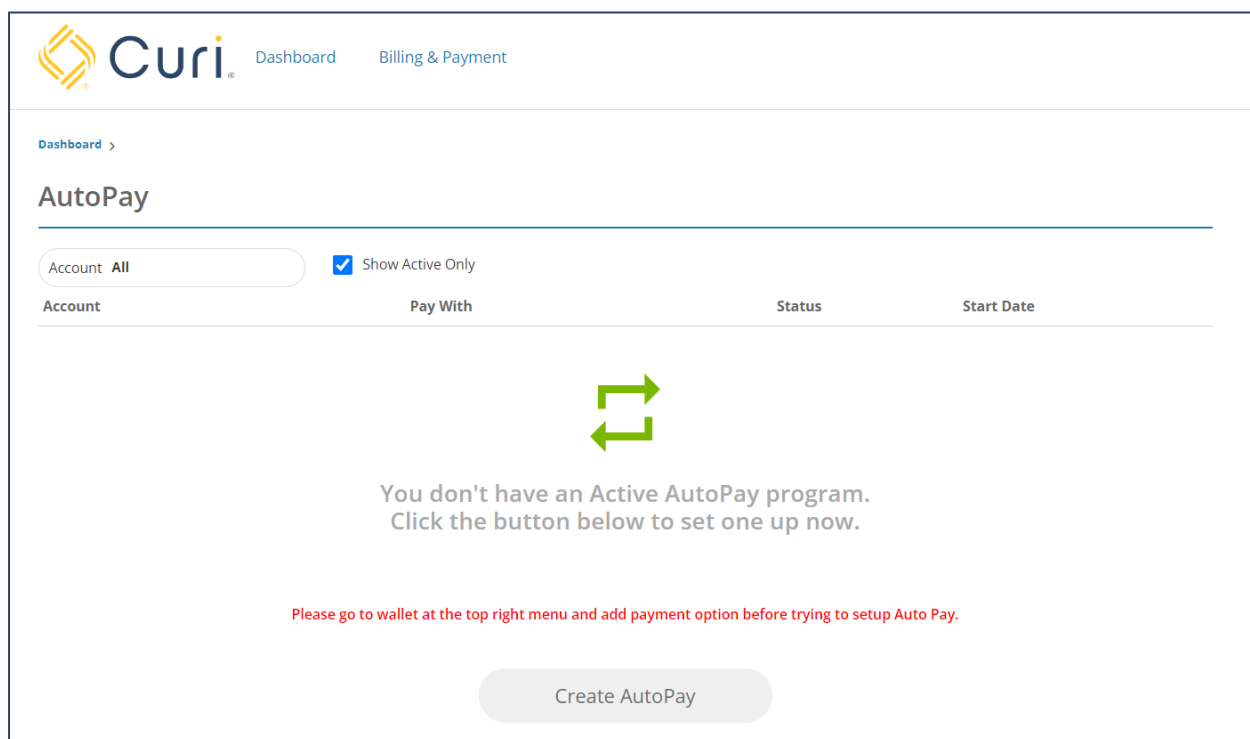
From there you will be directed to your “Account Dashboard” where you will see basic information regarding the account including the Amount Due, Bill History, Notification Preferences, and Payment History.

To set up AutoPay for the account listed, click on the grey “AutoPay” button under “Billing Services”.



Next, click on the “Create AutoPay” link in the middle of the page.

**Note:** If you do not have any payment options saved in your “Wallet”, you will need to add one prior to completing the AutoPay set up. For step-by-step instructions on how to set new payment options, see Curi’s User Guide on Setting up Payment Options in your Wallet.



The screenshot shows the Curi dashboard with the following elements:


- Header: Curi logo, Dashboard, Billing & Payment
- Breadcrumbs: Dashboard >
- Section Header: AutoPay
- Filters: Account All,  Show Active Only
- Table Headers: Account, Pay With, Status, Start Date
- Message: You don't have an Active AutoPay program. Click the button below to set one up now.
- Message: Please go to wallet at the top right menu and add payment option before trying to setup Auto Pay.
- Button: Create AutoPay

You'll begin by choosing your "Account Information" selections including Account Number and Payment Option.

**Note:** If you have multiple policies associated with your practice, you can choose which account you'd like to set up on AutoPay using the drop-down menu under the Account selection box. You will need to set up AutoPay separately for each account.

### Create AutoPay

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 **Account Info** ▼


Account

Pay With

AutoPay will take effect starting the **next business day** and will continue **until you cancel** it. The program will automatically pay the **full bill amount** up to a maximum of **\$1,000,000.00** for bank account, **\$25,000.00** for credit card, and **\$25,000.00** for pinless debit account. If you would like to edit these detail, change the options below.


Continue by selecting the Start and End Dates of the AutoPay process. You can select the date on which you would like your premium payments to begin automatically processing. You can also select how long you'd like for the autopayment process to remain active, either until further notice, until a specific date, or number of subsequent invoices.

 **Start and End Dates** ▼

Start on  
 

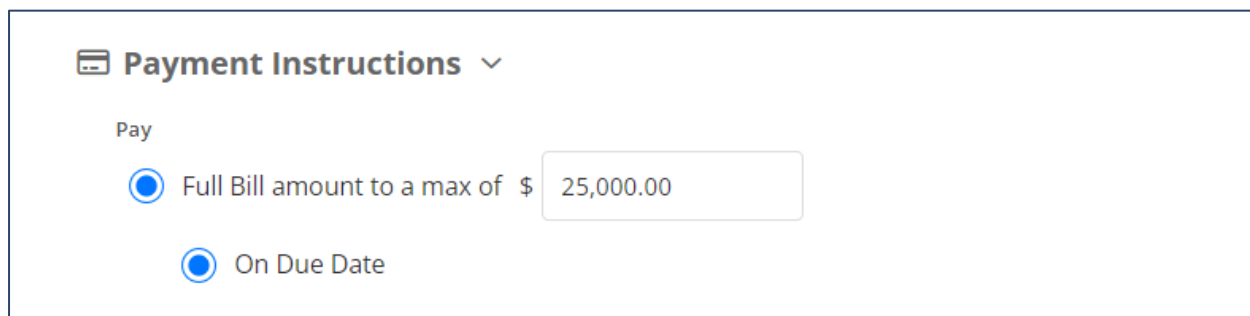
Remain Active

Until Further Notice

Until  

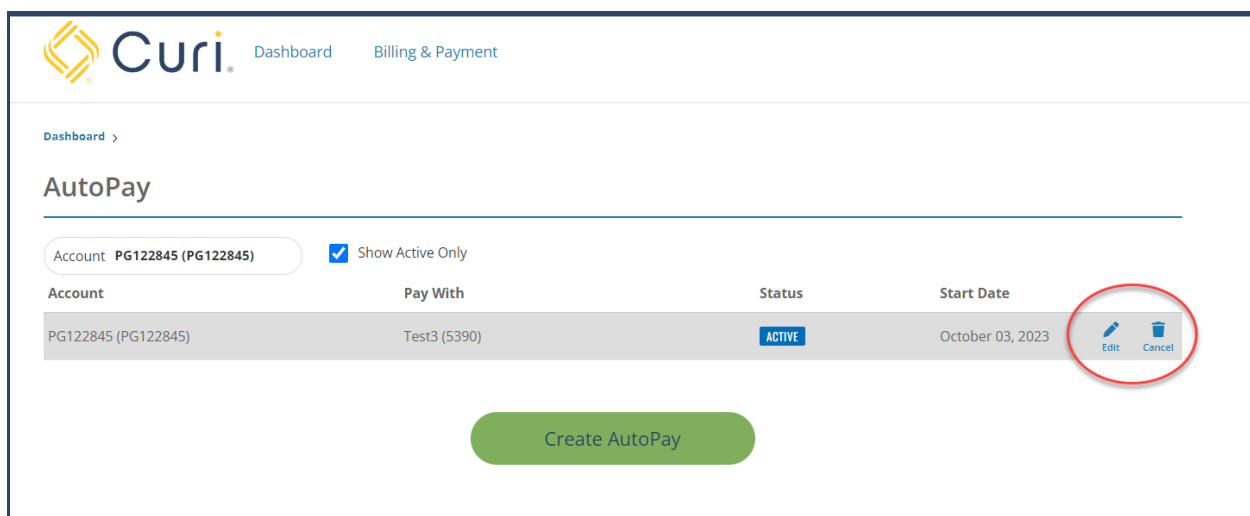
For the next  payments

Finally, select the maximum dollar amount Curi is authorized to pull from your account under the Payment Instructions section. The system defaults to the maximum dollar amounts allowed for the different payment types i.e., \$25,000 for credit card payments and \$1,000,000 for banking account information. However, you can reduce these amounts if desired.



The screenshot shows the 'Payment Instructions' section with a dropdown arrow. Under the 'Pay' heading, there are two radio button options. The first option, 'Full Bill amount to a max of \$', is selected and has a text input field containing '25,000.00'. The second option is 'On Due Date'.

Once complete hit the green “Save” button at the bottom of the screen and you will be directed to the AutoPay Dashboard where you will see the account noted as “Active” for Autopay. Finally, you can edit your AutoPay selections or delete AutoPay at any time by using the “Edit” or “Cancel” buttons on the far-right side of the screen.



The screenshot shows the Curi Dashboard for Billing & Payment. The 'AutoPay' section is active, showing a table with one entry. The entry has the account 'PG122845 (PG122845)', is paid with 'Test3 (5390)', has a status of 'ACTIVE', and a start date of 'October 03, 2023'. On the far right of the table row, there are 'Edit' and 'Cancel' buttons, which are circled in red. Below the table is a green 'Create AutoPay' button.

Account	Pay With	Status	Start Date	
PG122845 (PG122845)	Test3 (5390)	ACTIVE	October 03, 2023	<a href="#">Edit</a> <a href="#">Cancel</a>