



HOW TO SET UP NOTIFICATION PREFERENCES

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## HOW TO SET UP NOTIFICATION PREFERENCES

# Getting Started

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.

**Curi**

ADVISORY CAPITAL INSURANCE NEWS & KNOWLEDGE

CURI INSURANCE

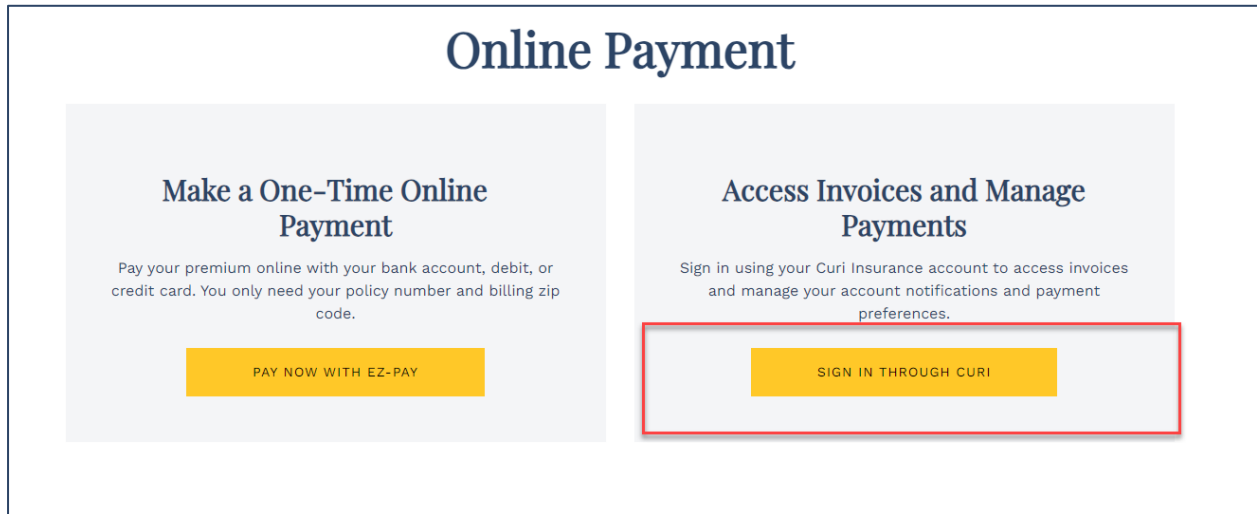
# All Curi Resources

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.

### POLICY MANAGEMENT

- Policyholder Services (PHS)**  
Manage policy information, access policy documents, generate COIs, view invoices, and more.
- Pay Insurance Premium**  
Curi provides an online payment portal that can be used for one time or recurring payments.
- Underwriting Forms**  
Forms available for download by state, including medical provider advanced practice provider applications.

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.

## HOW TO SET UP NOTIFICATION PREFERENCES

# Amending Email Notifications

To view notification preferences, click on the “Notifications” tab on the right side of the Dashboard home screen.

The screenshot displays the Curi dashboard interface. At the top left is the Curi logo. Navigation tabs include "Dashboard" (underlined) and "Billing & Payment". Below the navigation is a breadcrumb "Home >". The main heading is "My Account".

Account information includes "Account: PG122845 (PG122845)" and "Amount Due\*" of **\$5,177.25**. A green "View & Pay" button is positioned next to the amount. On the right side, there are three menu items: "Bill History" with a document icon, "Notifications" with a bell icon (circled in red), and "Payment History" with a calendar icon. Each item has a right-pointing chevron.

Below the account summary are two panels: "Account Activity" and "Billing Services".

- Account Activity:** Shows a list of transactions:
  - A payment was cancelled for \$3,212.12 on September 14, 2023.
  - A payment was made for \$3,500.00 on September 14, 2023.
  - You had a bill for \$3,212.12 due on September 27, 2023.A link "Want to see more bills or payments?" is at the bottom.
- Billing Services:** Shows "AutoPay" with a refresh icon and the status "INACTIVE".

A disclaimer at the bottom states: "\*This amount reflects the most recent balance for your account. Some transactions may take up to 3-5 business days to be displayed."

The system default is to activate all email notification types. However, you can turn off specific notifications by clicking on the green arrow for those you'd prefer not to receive.

*Please note, notifications will go to the email address used to sign in to [www.curi.com](http://www.curi.com).*

**Billing & Payment** AutoPay

You can configure notifications for bills and payments. Notifications include email and text and can be set up for your accounts. Once you activate an email notification for yourself you can assign additional contacts to it. You must have text turned on before you can configure options. To add contacts, go to [My Profile](#).

Contact: **Amber Popham (Primary)** Account: **PG119793(PG119793)** [Apply to all accounts for this contact](#)

Notification Type	Email	Text
<b>New Bill Notification</b> <a href="#">Configure</a>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<b>Bill and Payment Reminder Before Due Date</b> <a href="#">Configure</a> ✓ [Email] Send reminder 1 week before due date	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<b>Bill and Payment Reminder After Due Date</b> <a href="#">Configure</a> ✓ [Email] Send reminder 5 days after due date	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<b>Payment Confirmation</b>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<b>Rejected Payments</b>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<b>Cancel or Aborted Payments</b>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

To view and change notification preferences for the AutoPay process (if your account is set up on AutoPay), click on the “AutoPay” tab at the top of the screen. The system default is to activate email notifications for AutoPay Scheduled and AutoPay Expired. To add or delete preferences click on the green arrow next to those you’d wish to change.

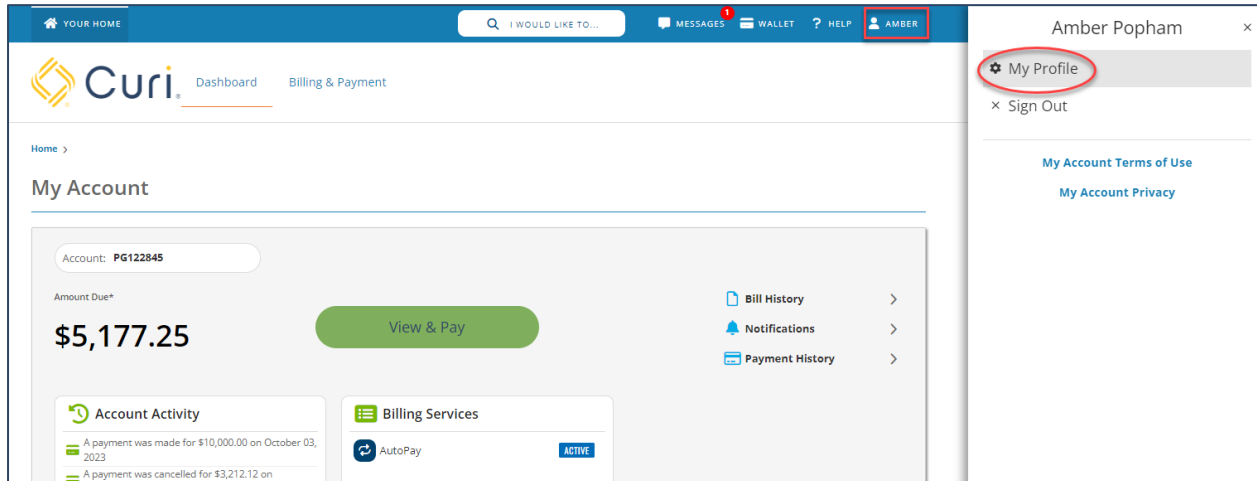
The screenshot shows the Curi user interface. At the top left is the Curi logo. To its right are the navigation links "Dashboard" and "Billing & Payment". Below the navigation is a breadcrumb "My Profile >". The main heading is "Notifications". There are two tabs: "Billing & Payment" and "AutoPay", with "AutoPay" being the active tab. Below the tabs is a text block: "You can configure notifications for bills and payments. Notifications include email and text and can be set up for your accounts. Once you activate an email notification for yourself you can assign additional contacts to it. To add contacts, go to [My Profile](#)." Below this text are two dropdown menus: "Contact: Amber Popham (Primary)" and "Account: PG122845". To the right of these is a link: "Apply to all accounts for this contact". Below the dropdowns is a table with the following structure:

Notification Type	Email	Text
AutoPay Scheduled	<input checked="" type="checkbox"/>	<input type="checkbox"/>
AutoPay Approved	<input type="checkbox"/>	<input type="checkbox"/>
AutoPay Expired	<input checked="" type="checkbox"/>	<input type="checkbox"/>
AutoPay Aborted	<input type="checkbox"/>	<input type="checkbox"/>

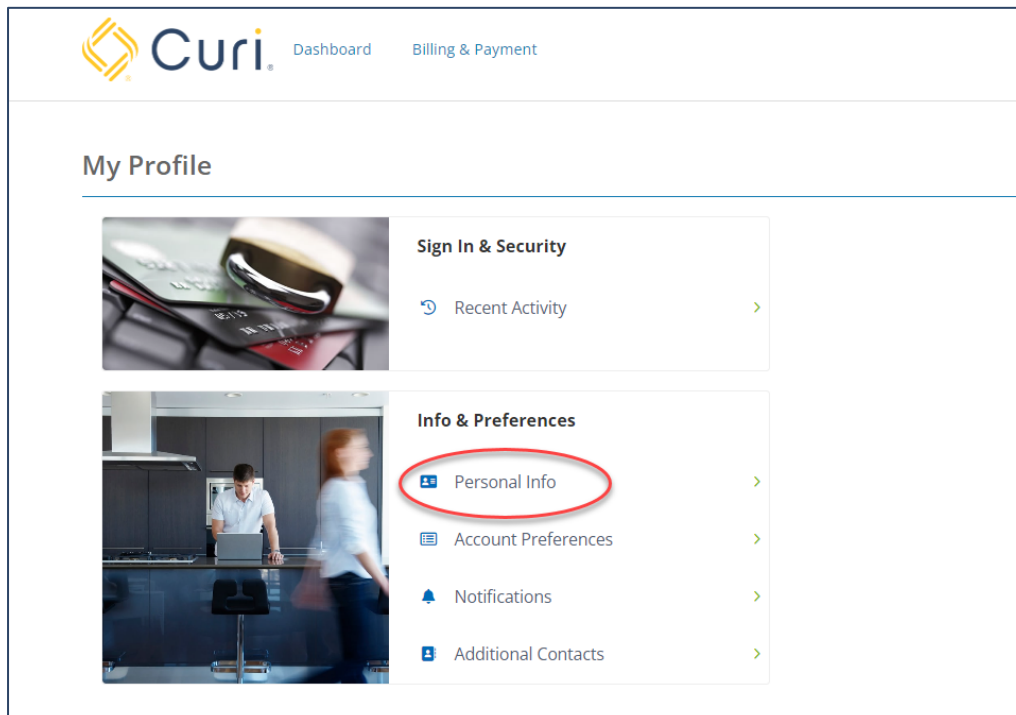
## HOW TO SET UP NOTIFICATION PREFERENCES

# Setting Up SMS/Text Notifications

You can also choose to receive SMS text notifications in addition to email notifications. To do so, you will need to begin by adding a phone number to your account profile. Start by clicking on your profile link at the top right-hand side of the navigation bar and then on “My Profile”



Next, click on “Personal Info”.



Then, click on the “Add” button next to the “Text Phone” at the bottom of the page and add the desired number in the box provided. Click the checkbox acknowledging you’ve read the terms and conditions and then click on the green “Save” button.

**My Profile**

Profile details will serve as your primary contact. Go to [notifications](#) to set all correspondence and communication for this contact

User ID  
83f321fb-add7-4a45-ab2f-bfc298faab45

First Name  
Amber

Last Name  
Popham [Edit](#)

Email  
amber.popham+pracadmintest@curi.com [?](#) [Edit](#)  
Security verification is required to change your email address

Text Phone (Opt-in is required for mobile verification) [Add](#)

**Add Text Phone** ✕

Phone Number  
 9198303278

Opt-in is required for mobile verification

Message and data rates may apply. Message frequency varies depending on account activity. Reply HELP for help or STOP to cancel at any time.

I have read and agree to the [Terms](#) and [Privacy Policy](#) for this service.

[Cancel](#) [Save](#)



Next, you will receive a system-generated SMS text message with instructions on completing the text notification registration process. Once you have successfully completed enrollment, you can go back to the notifications page and activate SMS text for any desired notification type. Do so by clicking the sliding button adjacent to the desired notification.

My Profile >

## Notifications

**Billing & Payment** [AutoPay](#)

You can configure notifications for bills and payments. Notifications include email and text and can be set up for your accounts. Once you activate an email notification for yourself you can assign additional contacts to it. You must have text turned on before you can configure options. To add contacts, go to [My Profile](#).

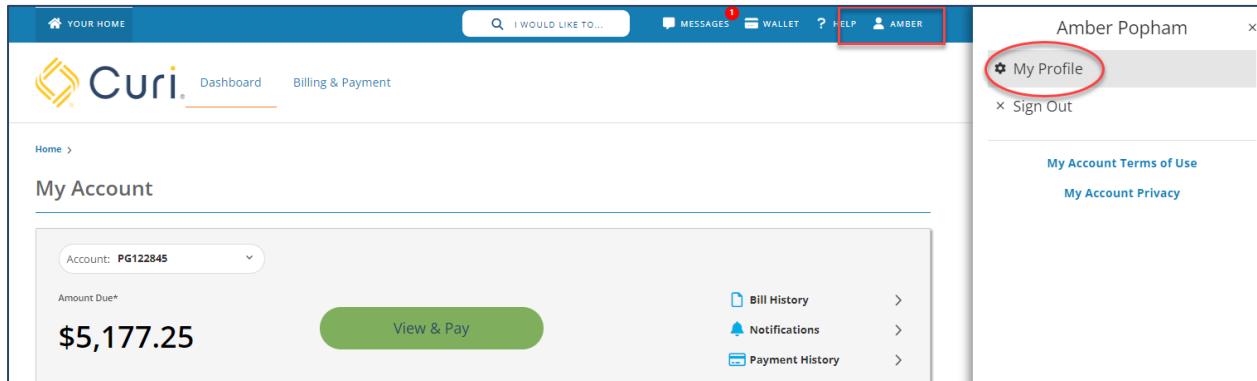
Contact: **Amber Popham (Primary)** Account: **PG119793(PG119793)** [Apply to all accounts for this contact](#)

Notification Type	Email	Text
<b>New Bill Notification</b> <a href="#">Configure</a>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Bill and Payment Reminder Before Due Date</b> <a href="#">Configure</a> ✓ [Email] Send reminder 1 week before due date	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<b>Bill and Payment Reminder After Due Date</b> <a href="#">Configure</a> ✓ [Email] Send reminder 5 days after due date	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<b>Payment Confirmation</b>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<b>Rejected Payments</b>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<b>Cancel or Aborted Payments</b>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

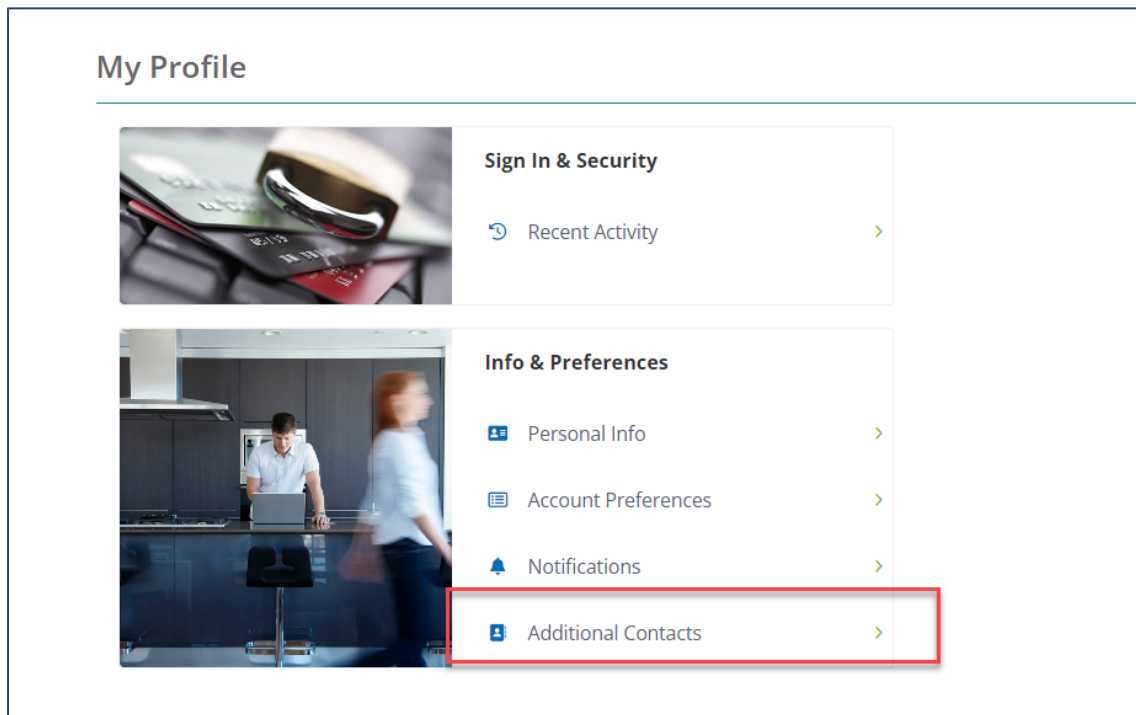
## HOW TO SET UP NOTIFICATION PREFERENCES

# Adding Additional Contacts

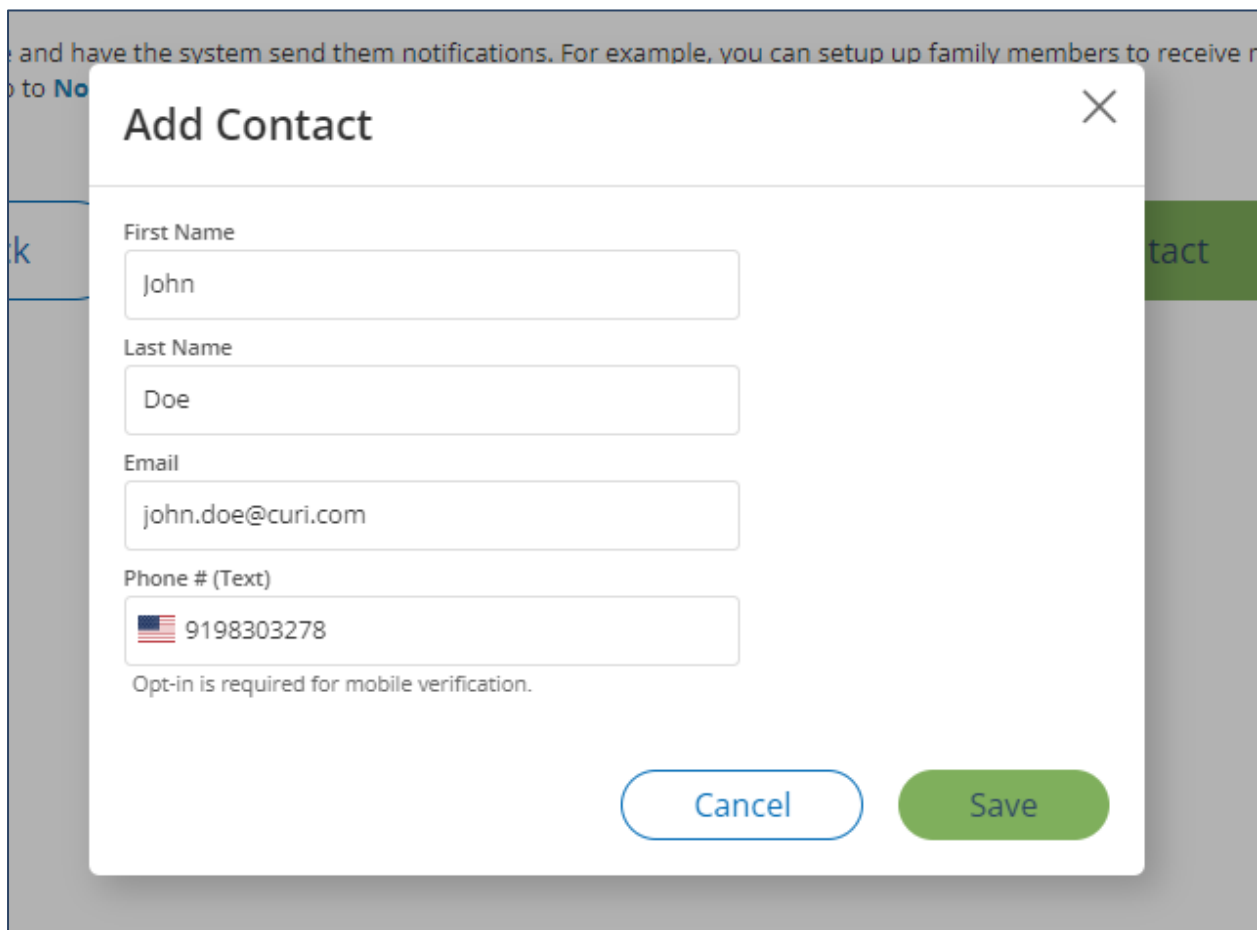
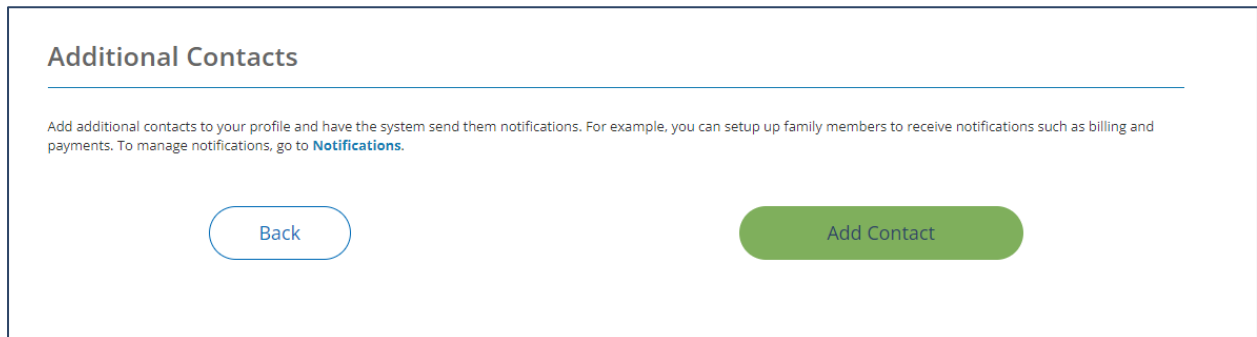
You can add additional contacts to your profile to have the system send them billing notifications as well. Additional contacts are added under the “My Profile” page.



Next, click on “Additional Contacts”.



From there, click on the “Add Contact” button, complete the pop-up box with the requested information, and hit “Save”.



From here, you can add additional contacts, or you can click on the notifications link to manage the billing notification for the newly added contacts.

**Curi** Dashboard Billing & Payment

### Additional Contacts

Add additional contacts to your profile and have the system send them notifications. For example, you can setup up family members to receive notifications such as billing and payments. To manage notifications, go to **Notifications**.

Name	Email	Phone # (Text)	Actions
John Doe	john.doe@curi.com	9198303278 Unverified Resend	

[Back](#) [Refresh](#) [Add Contact](#)

To manage the notification for additional contacts, go back to the notifications page and use the contact drop-down arrow under the contact field to select the contact whose notification preferences you'd like to amend.

### Notifications

[Billing & Payment](#) [AutoPay](#)

You can configure notifications for bills and payments. Notifications include email and text and can be set up for your accounts. Once you activate an email notification for yourself you can assign additional contacts to it. You must have text turned on before you can configure options. To add contacts, go to [My Profile](#).

Contact: **Amber Popham (Primary)** Account: **PG119793(PG119793)** [Apply to all accounts for this contact](#)

Notification: **John Doe (Secondary)**

	Email	Text
<b>New Bill Notification</b> <a href="#">Configure</a>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Bill and Payment Reminder Before Due Date</b> <a href="#">Configure</a> ✓ [Email] Send reminder 1 week before due date	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<b>Bill and Payment Reminder After Due Date</b> <a href="#">Configure</a> ✓ [Email] Send reminder 5 days after due date	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<b>Payment Confirmation</b>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

From there, update preferences as desired.

The screenshot shows the Curi user interface for managing notifications. At the top, the Curi logo is on the left, and 'Dashboard' and 'Billing & Payment' are on the right. Below the logo is a 'My Profile >' link. The main heading is 'Notifications'. There are two tabs: 'Billing & Payment' (selected) and 'AutoPay'. A text block explains that notifications include email and text, and can be set up for accounts. It also notes that email notifications can be assigned to additional contacts, but text must be turned on first. Below this are two dropdown menus: 'Contact: John Doe (Secondary)' and 'Account: PG119793(PG119793)', with an 'Apply to all accounts for this contact' link. The main content is a table of notification types with toggle switches for 'Email' and 'Text'.

Notification Type	Email	Text
New Bill Notification <a href="#">Configure</a>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Bill and Payment Reminder Before Due Date	<input type="checkbox"/>	<input type="checkbox"/>
Bill and Payment Reminder After Due Date	<input type="checkbox"/>	<input type="checkbox"/>
Payment Confirmation	<input type="checkbox"/>	<input type="checkbox"/>
Rejected Payments	<input type="checkbox"/>	<input type="checkbox"/>
Cancel or Aborted Payments	<input type="checkbox"/>	<input type="checkbox"/>