



How to Complete an AutoPay and Wallet Transfer

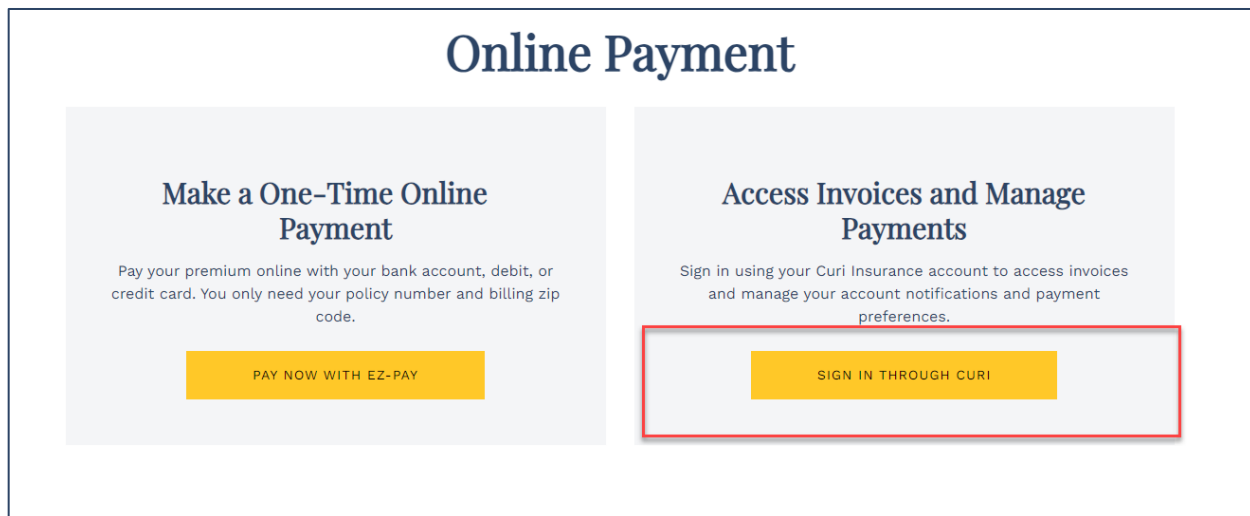
Before you begin the transfer: The approved account user must have an active AutoPay account before a transfer request and transaction can be made. Ensure the policy number and zip code are associated with your account before completing the transfer process.

You can access your payment account via our website at 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.

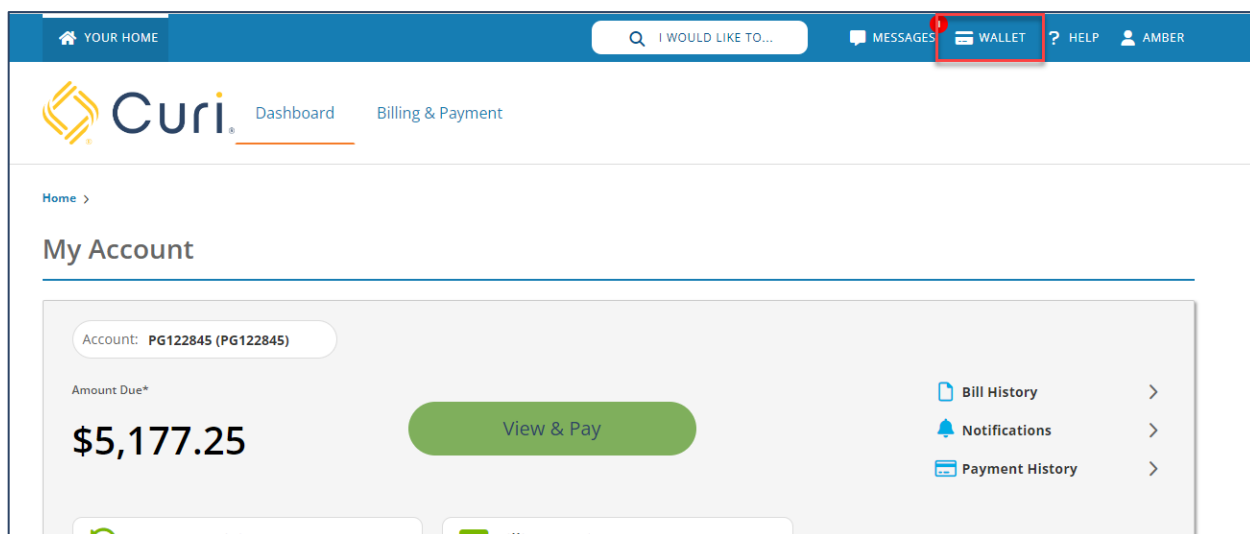
A screenshot of the Curi Insurance website. The top navigation bar includes the Curi logo, links for ADVISORY, CAPITAL, INSURANCE, and NEWS & KNOWLEDGE, a search icon, and a user profile icon labeled 'AP'. Below the navigation bar is a dark blue banner with the text 'CURI INSURANCE' and 'All Curi Resources'. Underneath the banner, a message 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 message is a section titled 'POLICY MANAGEMENT' with an upward arrow icon. This section contains three white boxes with grey borders. The first box is 'Policyholder Services (PHS)' with the description 'Manage policy information, access policy documents, generate COIs, view invoices, and more.' The second box is 'Pay Insurance Premium' with the description 'Curi provides an online payment portal that can be used for one time or recurring payments.' This box is circled in red. The third box is 'Underwriting Forms' with the description '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.

To access your Wallet, click on the “Wallet” icon at the top right-hand side of the Dashboard screen.



On this screen, you can easily see if there is an active AutoPay on your account. Next, click on the “Wallet Transfer” button from the right navigation.

My Account

Account: **PS120703**

Current Due
\$14,785.80

[View & Pay](#)

Need To Make A One Time Payment Via EZ-Pay?

Account Activity

- You had a bill for \$3,433.11 due on February 18, 2025
- You had a bill for \$2,289.66 due on January 18, 2025
- A payment was made for \$4,104.15 on October 13, 2023
- A payment was made for \$4,104.15 on October 13, 2023
- A payment was made for \$4,104.15 on October 13, 2023

[Want to see more bills or payments?](#)

Billing Services

- Paperless Billing** ACTIVE
- AutoPay** ACTIVE

Right Navigation:

- Bill History
- Notifications
- Payment History
- Wallet Transfer**

*This amount reflects the most recent balance for your account. Some transactions may take up to 3-5 business days to be displayed.

The transferee must add the policy number with the zip code to their account prior to a wallet transfer in order to appear in the transferor’s contact list.

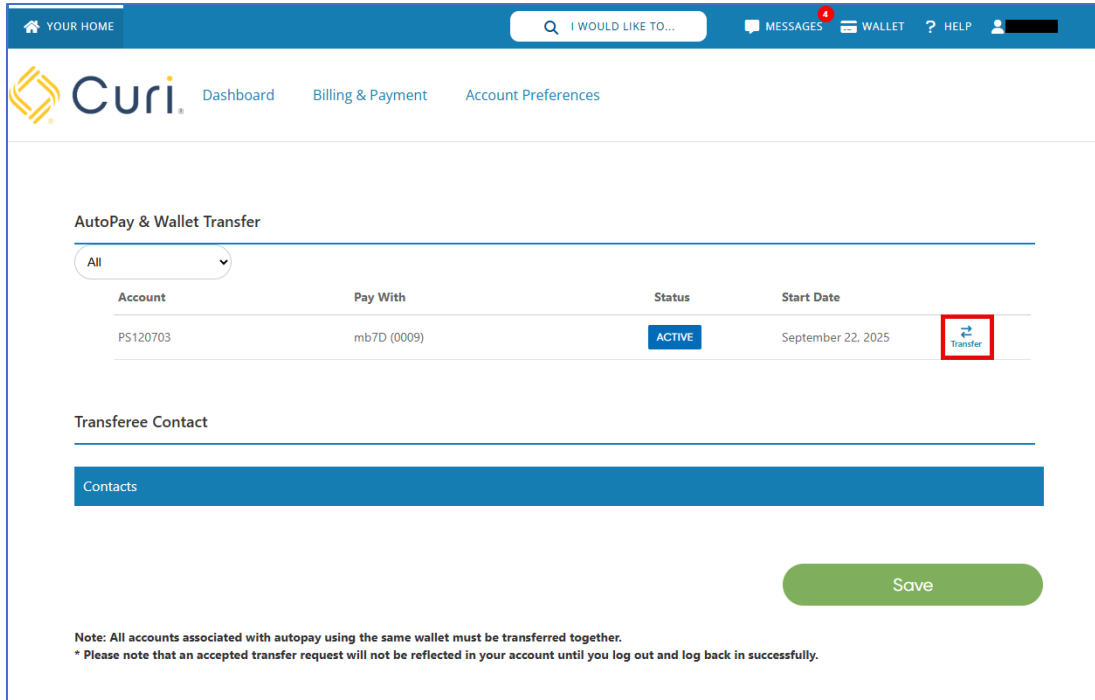
Account Preferences

Account: **All**

Account	Nickname	Paperless	AutoPay	Action
PG113302	PG113302	☒	☐	Edit
PG113715	PG113715	☒	☒	Edit
PS122266	PS122266	☒	☒	Edit
PS122561	PS122561	☒	☒	Edit
PS120703	Transferee	☒	☐	Edit

[Back](#) [Add Account](#)

The transferor will see an account eligible for AutoPay and Wallet transfer in the dashboard.



The screenshot shows the Curi dashboard with the 'AutoPay & Wallet Transfer' section. A table displays account information, and a 'Transfer' button is highlighted in a red box.

Account	Pay With	Status	Start Date	
PS120703	mb7D (0009)	ACTIVE	September 22, 2025	

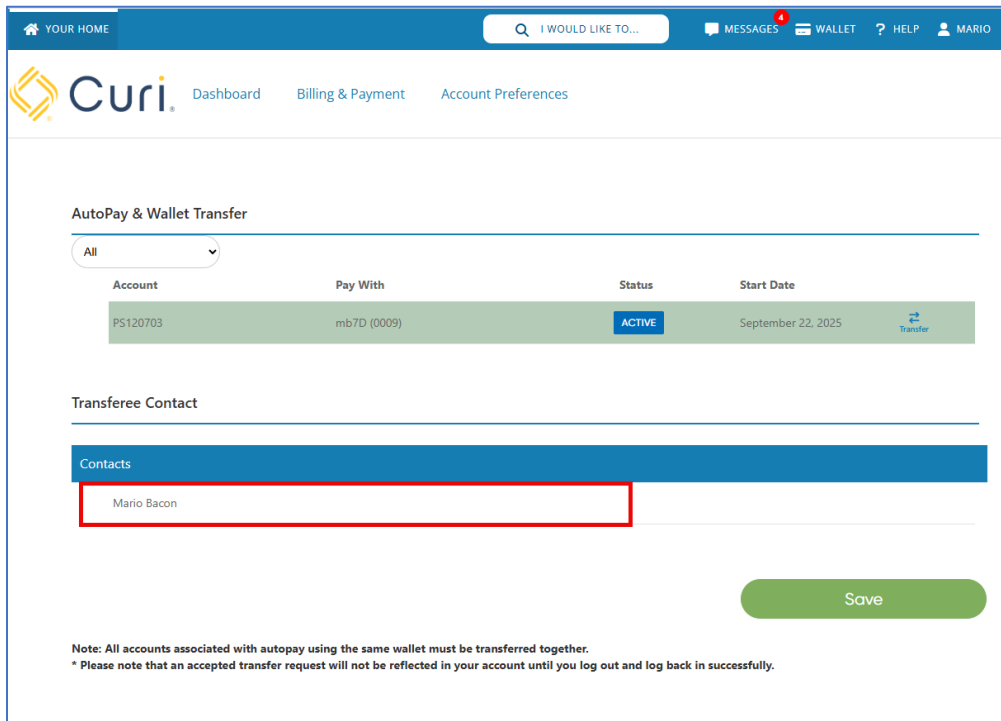
Transferee Contact

Contacts

[Save](#)

Note: All accounts associated with autopay using the same wallet must be transferred together.
* Please note that an accepted transfer request will not be reflected in your account until you log out and log back in successfully.

When this transfer action button is clicked (noted in the above red box), the Transferee Contact appears.



The screenshot shows the Curi dashboard after clicking the 'Transfer' button. The 'Transferee Contact' section now displays the contact name 'Mario Bacon'.

Account	Pay With	Status	Start Date	
PS120703	mb7D (0009)	ACTIVE	September 22, 2025	

Transferee Contact

Contacts

Mario Bacon

[Save](#)

Note: All accounts associated with autopay using the same wallet must be transferred together.
* Please note that an accepted transfer request will not be reflected in your account until you log out and log back in successfully.

Select the Transferee contact and click “Save”.

The screenshot shows the Curi dashboard with the 'AutoPay & Wallet Transfer' section. The 'Transferee Contact' section shows a list of contacts with 'John Doe' selected. A green 'Save' button is highlighted with a red rectangle.

AutoPay & Wallet Transfer

All

Account	Pay With	Status	Start Date	
PS120703	mb7D (0009)	ACTIVE	September 22, 2025	Transfer

Transferee Contact

Contacts

John Doe

Save

Note: All accounts associated with autopay using the same wallet must be transferred together.
* Please note that an accepted transfer request will not be reflected in your account until you log out and log back in successfully.

A pop-up will appear for confirmation of the AutoPay wallet transfer to the designated Transferee contact. Click “Yes” to initiate the transfer, or” No” to cancel the transfer.

The screenshot shows the Curi dashboard with the 'AutoPay & Wallet Transfer' section. A confirmation pop-up is displayed over the 'Transferee Contact' section, asking to confirm transferring Autopay and Wallet to John Doe. The 'Yes' button is highlighted with a red rectangle.

AutoPay & Wallet Transfer

All

Account	Pay With	Status	Start Date	
PS120703	mb7D (0009)	ACTIVE	September 22, 2025	Transfer

Transferee Contact

Contacts

John Doe

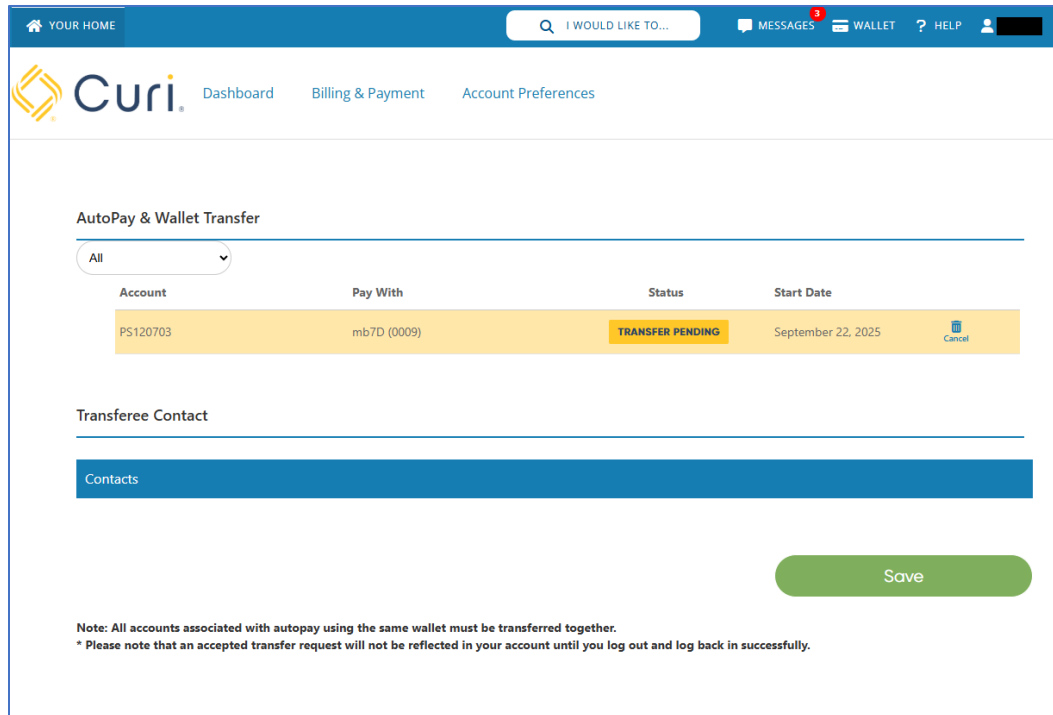
Save

AutoPay & Wallet Transfer
Confirm transferring Autopay and Wallet to John Doe for account(s): PS120703

Yes No

Note: All accounts associated with autopay using the same wallet must be transferred together.
* Please note that an accepted transfer request will not be reflected in your account until you log out and log back in successfully.

Once the transaction has a “Transfer Pending” status, the Transferee should now receive a message to accept the wallet transfer for the specified account.



AutoPay & Wallet Transfer

All

Account	Pay With	Status	Start Date	
PS120703	mb7D (0009)	TRANSFER PENDING	September 22, 2025	Cancel

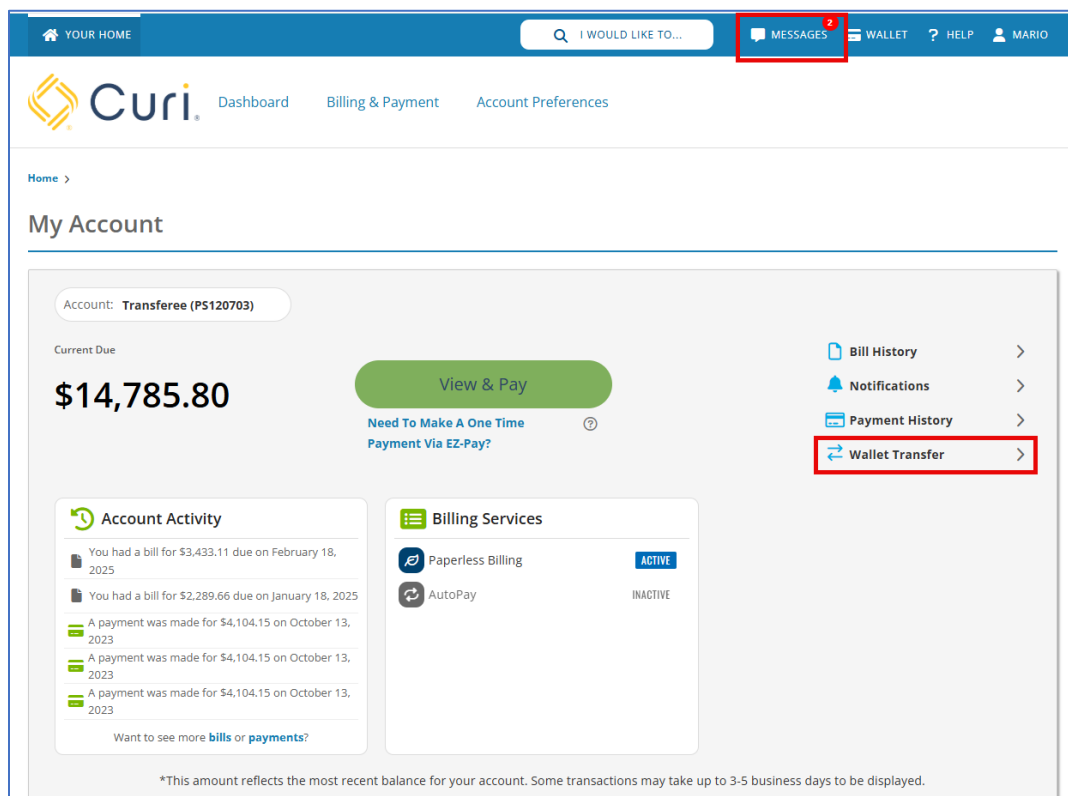
Transferee Contact

Contacts

Save

Note: All accounts associated with autopay using the same wallet must be transferred together.
* Please note that an accepted transfer request will not be reflected in your account until you log out and log back in successfully.

The Transferee can check messages or go directly to the Wallet Transfer page to accept the AutoPay wallet transfer.



My Account

Account: Transferee (PS120703)

Current Due

\$14,785.80

View & Pay

Need To Make A One Time Payment Via EZ-Pay?

Bill History >

Notifications >

Payment History >

Wallet Transfer >

Account Activity

You had a bill for \$3,433.11 due on February 18, 2025

You had a bill for \$2,289.66 due on January 18, 2025

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Want to see more bills or payments?

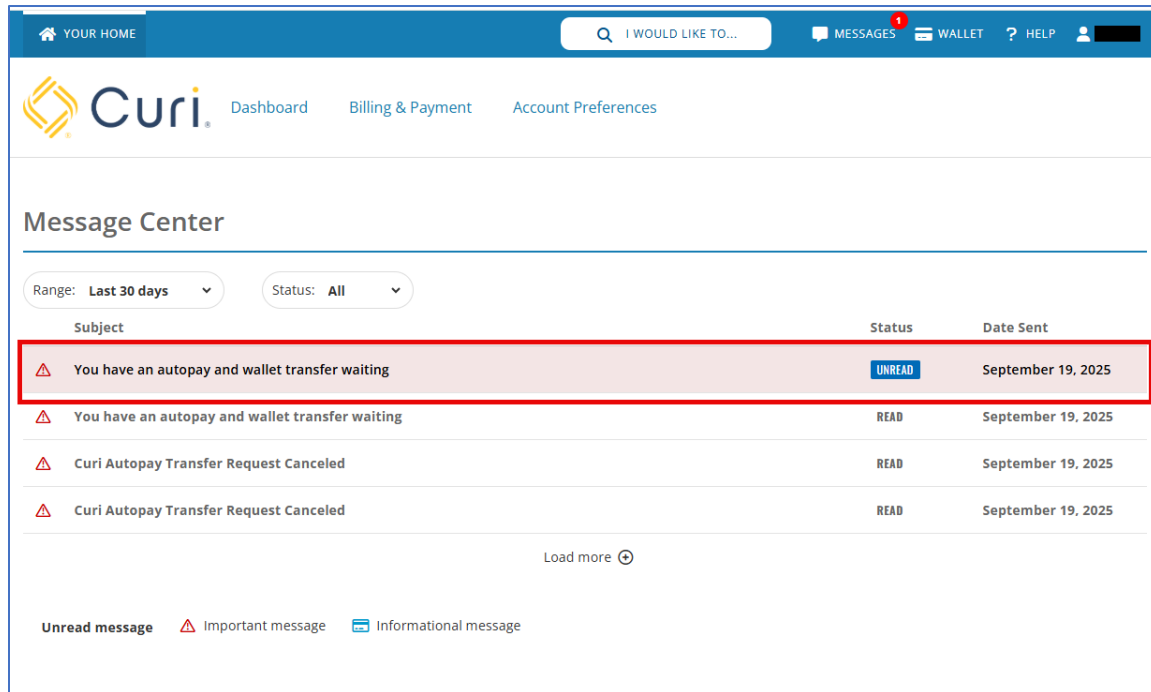
Billing Services

Paperless Billing ACTIVE

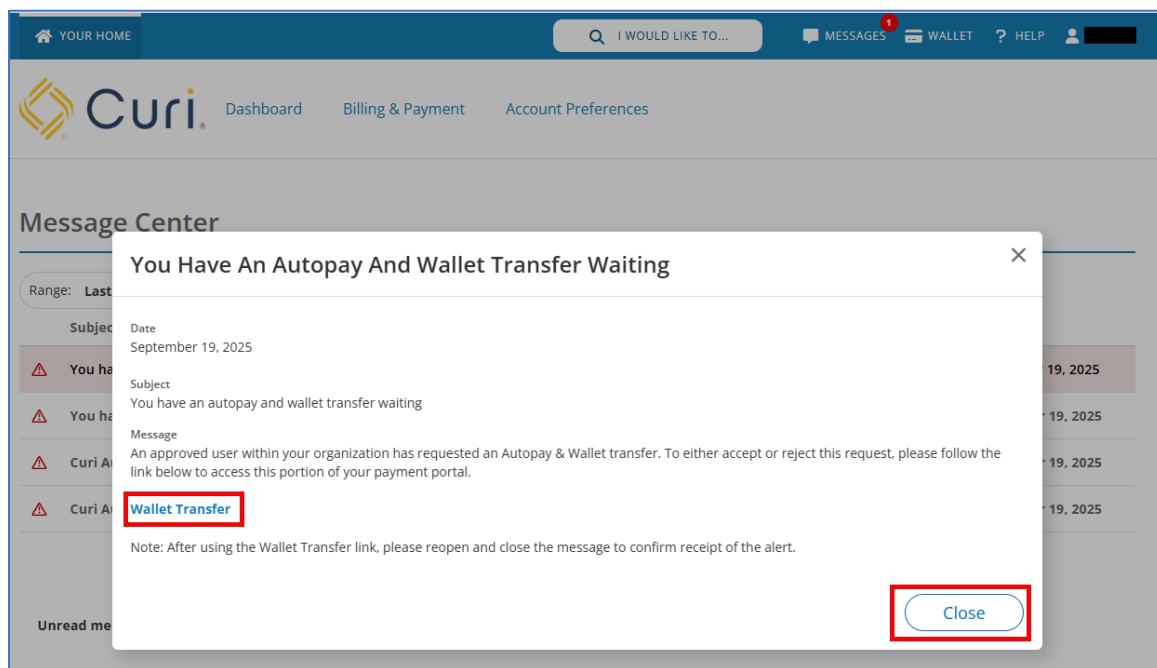
AutoPay INACTIVE

*This amount reflects the most recent balance for your account. Some transactions may take up to 3-5 business days to be displayed.

By clicking “Message”, the Transferee will see a list of read and unread messages. Select the AutoPay wallet transfer message to complete the transfer.



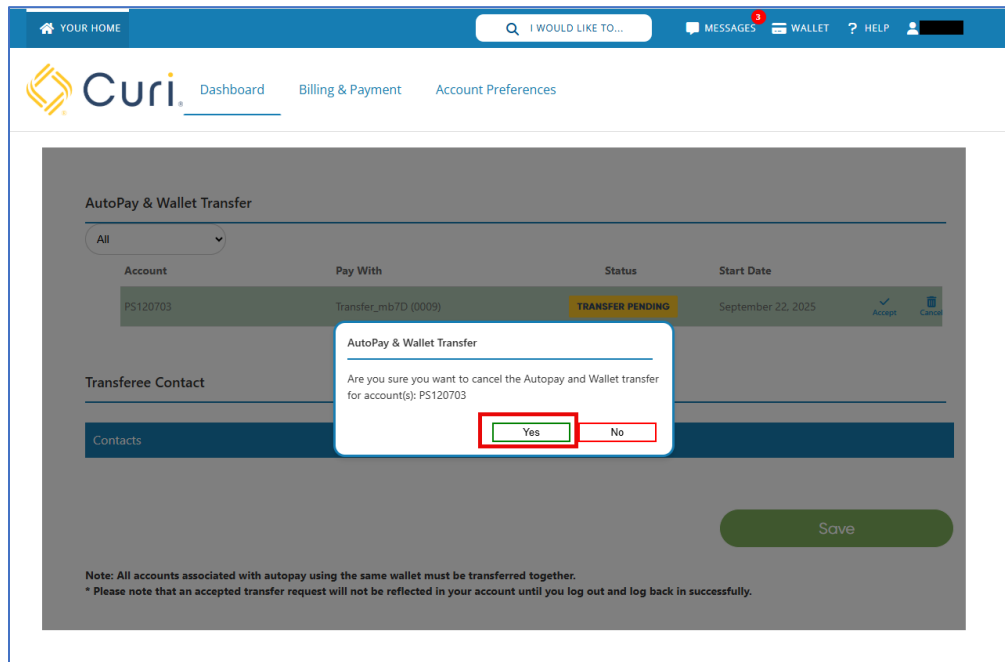
Click the Wallet Transfer link to go directly to the AutoPay Wallet Transfer page or click “Close” to mark the message as read.



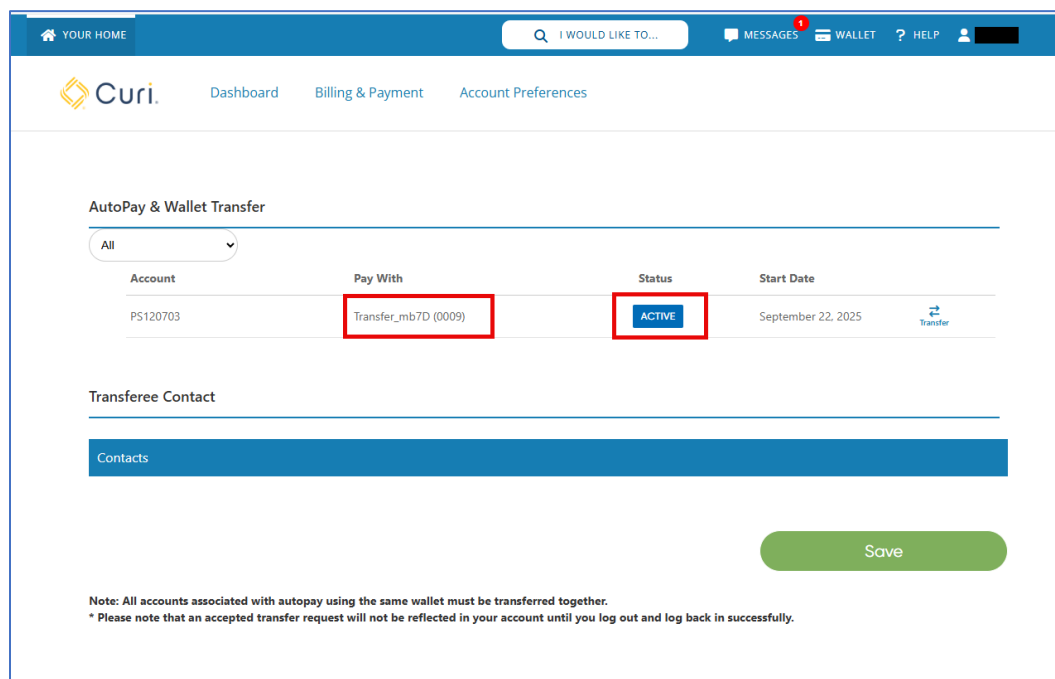
After clicking the Wallet Transfer link in the message, the user is transferred to the AutoPay & Wallet Transfer page, where the wallet transfer is waiting to be accepted or cancelled. **Note:** The message notification at the top of the screen will still appear to be marked as unread even though the message has been viewed. After the action is accepted, the Transferee can accept the wallet transfer by clicking accept.

A pop-up will appear for the Transferee to approve or decline the transfer. Click “Yes” to accept or “No” to cancel the transfer.

If “No” is selected, a pop-up will appear to confirm the cancellation. Select “Yes” to cancel the transfer or “No” to accept the transfer. If no is selected, the wallet transfer will be removed from the page.



Once accepted, the status will change from “Transfer Pending” to “Active”. The transfer is now complete. The word “Transfer” will also show in front of the card/account alias name, indicating that this card/account wallet was transferred.



The recipient of the wallet will see it after logging out and back into their account.

The screenshot shows the Curi 'AutoPay & Wallet Transfer' page. The 'WALLET' tab is selected in the top navigation bar. A modal window titled 'Wallet' is open on the right, displaying two transfer cards. The first card, 'Transfer_mb7D', is highlighted with a red box and shows a DEBIT card with masked number ****0009, expiring 05/30/28202. The second card, 'Transfer_Mario', shows a VISA card with masked number ****1111, expiring 12/30/27103. Both cards have 'Remove' and 'Edit' buttons. Below the cards is a green 'Add' button. The main page shows a table with one entry: Account PS120703, Pay With Transfer_mb7D (0009), Status ACTIVE, and Start Date September 22, 2025. A 'Transfer' button is next to the entry. Below the table is a 'Transferee Contact' section with a 'Contacts' button. A green 'Save' button is at the bottom right. A note at the bottom states: 'Note: All accounts associated with autopay using the same wallet must be transferred together. * Please note that an accepted transfer request will not be reflected in your account until you log out and log back in successfully.'

Upon completion of the transfer, the transferee will no longer see transfer activity or card/account information for the transferred AutoPay and Wallet.

The screenshot shows the Curi 'AutoPay & Wallet Transfer' page after the transfer is complete. The 'WALLET' tab is still selected. The modal window is no longer visible. The table now shows no entries. The 'Transferee Contact' section and the green 'Save' button remain. The same note is at the bottom: 'Note: All accounts associated with autopay using the same wallet must be transferred together. * Please note that an accepted transfer request will not be reflected in your account until you log out and log back in successfully.'