

## Issue a Policy via CC or ACH

### Binding via CC

While our agency base is familiar with the term “bind” there is no binding at biBerk.

First, an application must be quoted by going to [www.biberk.com/partners](http://www.biberk.com/partners).

After answering all the questions, and filling out all of the policy details, you should reach a billing page. This page will allow you to either submit a payment using a debit or credit card or submit the quote to Underwriting for referral.

1. After reaching the payment screen, entering debit/credit card information, and confirming terms - select the Purchase button.

The terms have been read aloud to the insured.

Purchase

Submit To Underwriting

A Certificate of Insurance (COI) is available online by email minutes after your purchase, and can be mailed to businesses as needed.

2. For renewals as well as approved referred applications the binding takes places on the Billing tab.

Billing Certificates Contacts Conversations Coverage Documents Underwriting

Payment

Direct Draft One-time Credit Card Recurring Payments

Select a Payment Amount

Past Due

Payment Due

Remaining Balance

Payment Date

mm/dd/yyyy

Account Type

please choose

Account Number

\$421.50

\$686.68

\$2,810.00

Routing Number

Email

please choose

AutoPay

AutoPay

Save \$7 per future payment up to \$43 a year with AutoPay

Agree to biBERK Terms and Conditions.

English Terms Spanish Terms

Please be advised you are entering in to an annual contract. We reserve the right to cancel for misrepresentation or fraud. If the policy is cancelled, we reserve the right to retain a portion of the premium subject to state laws and terms of the policy. For a complete list of terms and conditions, please read the policy. Please say "yes" if you understand and agree with these terms and conditions.

The terms have been read aloud to the insured.

Submit

### Binding via ACH

Our auto-underwritten applications only have the option to purchase with a debit or credit card.

If an insured would like to bind via ACH, the following instructions need to be followed:

1. Select Submit to Underwriting

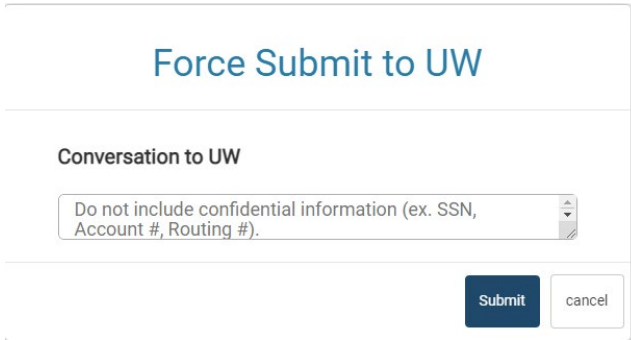
The terms have been read aloud to the insured.

Purchase

Submit To Underwriting

A Certificate of Insurance (COI) is available online by email minutes after your purchase, and can be mailed to businesses as needed.

- The following screen will appear:



- In the Conversation to UW box enter the following:
  - A brief synopsis of the business operation.
  - The reason you are referring. In this example it would be “Referring because client wants to purchase with ACH”.
  - If the submission is for W/C, also enter:**
    - Payroll Breakdown needed (W2/1099 count, type of work and payroll).
    - Listing of owners/officers and whether they are to be excluded or included.
- Select Submit.
- The application will now be in the Underwriting queue and fully underwritten.
- Upon approval by Underwriting, you’ll pull up the quoted application in the biBerk Service Portal (BSP).
- Under the Billing tab process the ACH binding payment.

