1. To find a policy for an individual, click “Policies”
2. If you’re searching for a specific person, type their information in, here. Otherwise, press Search to populate all of your members’ policies.

3. Select the Policy you want to view by clicking “View/Edit”

4. Scroll to the bottom of the policy screen and click “View Details.” Then, along the left side of the screen under Member Portal, you can view the various payment and enrollment screens. Click “Payment Options”
5. The member’s payment screen will appear with various payment options. To make a recurring payment, use the bottom part of the screen. You should view the accurate member ID, Name, Due Date and amount for the payment. For members that are not delinquent, the outstanding balance, should be their monthly responsibility. If the member has gone into grace period, the outstanding balance will be the total amount due.

6. The Virtual Wallet will appear to add the payment method. You can assist them with entering a card or bank information in the screens pictured to the right.

7. Members can choose the date for the recurring payment to occur each month – any day between the 15th and the 25th. Select it here, on the calendar shown.