JET Insure Broker Portal Training Guide 17: Making a Recurring Payment Small Group

1. To find a policy for a group, 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 Group Policy you want to view by clicking “View/Edit”

4. The group portal will appear on the screen as shown below.
5. To access payment options, however over Billing and click “Payment Options”

6. To make a recurring payment, select the day of the month you wish to establish payment and click on “Click to add a recurring Payment”

7. The virtual wallet will appear to approve/add the payment method. If the group does not yet have a payment method saved, you can assist them with entering a card or bank information in the screens pictured below.