InsurLink Questions

What's the difference between InsurLink and Client Portal?

InsurLink is the new and improved Client Portal. It has a brand new user interface and additional functionality (i.e. InsurLink Payments), but there's nothing you need to do on your end to give your existing clients access other than turn on the new UI in the Admin Settings page.

Do changes in InsurLink go to the agent or carrier?

When a user requests a change in InsurLink, the agent will be notified in the management system. The agency can choose who receives notifications for their customers.

Can we access InsurLink through AMS360?

InsurLink is accessible from the agency side through AMS360 once your agency has purchased the product and been provisioned. Only the end-insured users will need to access it through a separate website, which you send an invitation via email.

How does an invoice get into the InsurLink?

All agency bill invoices that are in your AMS360 will appear in InsurLink automatically.

How is a payment made through InsurLink recorded in AMS360?

There will be an Activity and Suspense created in AMS360. ePayPolicy will also provide a file that can be uploaded into AMS360 to create the cash receipts.

How is an ePayPolicy transaction recorded in Sagitta for those who don't use Activities?

A non-posted cash receipt will be created in Sagitta.

Can InsurLink replace how I communicate with my clients through CSR24?

Yes, InsurLink would be your new main way to communicate digitally with your customers. This includes their ability to submit claims, request certificates, add holders, and more. CSR24 and InsurLink work slightly differently when it comes to certificate management, as InsurLink pulls all certificates from the management system (either AMS360 or Sagitta). We are happy to provide a full demo to go over just how each of these features work and how they can be customized for your agency.

Do clients need to be setup in InsurLink before making a payment?

Yes, you will need to invite your customers to use InsurLink so they can make the payments through InsurLink's Billing tab. Once you've integrated your AMS360 with ePayPolicy, completed the setup process for the InsurLink integration, and the end insured has been invited/activated their InsurLink account, the open agency bill invoices will automatically be available for them to pay.

Can ePayPolicy be connected to AMS360 without InsurLink being set up first?

ePayPolicy can connect to AMS360 without InsurLink being set up first.

Does the Policy view need to be enabled for the insured to see their billing and pay their invoices?

No - you are welcome to hide the Policy tab from your end-insured users and just show them the Billing Summary tab.

Is this integration available for both AMS360 in-house and online?

This integration is only available for AMS360 online.

InsurLink Payments Questions

Can we use ePayPolicy as agents?

Yes.

Does the Agent need a credit card system to take a credit card payment?

You will only need to sign up for ePayPolicy as your payment provider. No other services are needed.

Is there a limit to the number of bank accounts you can link to the portal?

At this time, we can only move funds into one bank account, but we are going to be building the ability to do split funding later this year.

How do you direct the payment to your bank account?

ePayPolicy will collect your bank account information once you sign up for our service.

Will I be notified once a client has processed a payment in InsurLink?

You will receive an email notification from ePayPolicy.

Does ePayPolicy save any of the clients' payment information?

ePayPolicy does not directly store your clients' payment information.

Our agency has designed its own mobile app, can ePayPolicy be integrated?

Yes.

Do we need to contact our account manager to get our impersonation key?

Yes. Or you can get it through our dashboard by going to Account > API Credentials.

Is the InsurLink integration with ePayPolicy included in the InsurLink service, or is there a different subscription?

Once you sign up with ePayPolicy and pay the monthly fee, there is no additional charge for the InsurLink integration.

Is there a separate charge for integrating a pre-existing ePayPolicy account with AMS360?

The ePayPolicy Support Team can help get your integration set up. You will only need to be on the$50/mo plan.

Is it $50 per month for the agency or number of users?

It is $50 per month for the agency regardless of the number of users or the volume processed.

What does the $3 fee go to?

The $3 for ACH transactions goes to ePayPolicy to cover their fees as well as the bank fees. The only fee to the agency from ePayPolicy is $50/mo.

Can InsurLink Payments process direct bill invoices?

At this time, InsurLink Payments can only process Agency Bill invoices. We are working on developing more functionality in InsurLink to handle Direct Bill, but for now this will need to be collected outside of InsurLink.

Can customers with multiple lines of business pay all their bills at the same time?

Yes, clients can pay on any open agency bill invoices regardless of lines of business.

How are overpayments handled?

Our system allows for paying up to the invoice amount and prevents over payments.

If a client pays multiple times for the same transaction, how does that appear in AMS360?

Duplicate Activities and Suspenses will be created in AMS360.

For more information on InsurLink Payments, please contact your Account Manager.