

**CWG Agent Portal
Payment Notification Guide
Sweep/Mail**

From the HOME page of the Agent Portal, go to the Policy Information tab, and select Billing Inquiry:



After the search screen loads, choose how you would like to search for your insured, and enter the appropriate information (By policy, enter the seven digit policy number). When finished select search.

1. After selecting the appropriate term, select the Payment Notification radio button in the box on the right side of your screen as shown below. This field will be grayed out on Agency Billed policies.
2. The Payment Notification form will load. Fill out the remainder of the fields that are not prefilled for you, making sure to select either “Mail pmt to company” or “Deposit, please sweep pmt.” If you are unsure if your agency is setup for sweep please contact the billing department at 877-385-9114.
3. When you are finished select the Send Message button. You will get a confirmation message with a link that will allow you to print the receipt for your records.

The screenshot shows a web interface for a "Payment Notification" form. At the top, there is a dropdown menu labeled "Acct/Policy #" and four radio buttons: "General Information", "Transaction", "Installment Schedule", and "Payment Notification". A red arrow labeled "1." points to the "Payment Notification" radio button. Below this is the main form area with the title "Payment Notification". It contains several fields: "Account / Policy:" with a dropdown showing "Acct/Policy #"; "Insured Name:" with an empty text box; "Payment Amount:" with an empty text box; "Payment Type:" with radio buttons for "Cash" (selected) and "Check", and a "Check Number:" text box; "Agent Representative Name:" with a text box containing "Stephanie Smith"; "We Will:" with radio buttons for "Mail payment to company" (selected) and "Deposit payment in our account. Please sweep payment"; and a "Comment:" text area. A "Send Message" button is at the bottom, with a red arrow labeled "3." pointing to it. A yellow highlight is behind the "Mail payment to company" radio button. A red arrow labeled "2." points to the "Agent Representative Name:" field. At the bottom of the form, there is a disclaimer: "Receipt confirmation does not guarantee continuation or reinstatement of coverage. If you have a question or concern, please contact our Direct Billing Department."

If you have any questions about the information provided above, or get any type of error during the sweep processes, please contact Agency Support at 800-432-4908.