Policyholder Portal Enrollment

Policyholders may visit <u>www.thesilverlining.com</u> and create an account. With an account they can:

- Set up or edit an automatic payment rule (scheduling withdrawals from a checking or savings account).
- Enable paperless (billing statements and policy documents).
- Receive email notification when an invoice is available.

To **enroll**, go to <u>www.thesilverlining.com</u> and click on the **Policyholder Login** link. Or use the West Bend app. To signup, the policyholder needs an email address and their policy number.



Click LOG IN button.



If first time using the portal, click Create Account link under Log In button.



To enroll through the app, reference the following screenshots:



The log in screen opens. Click on Create Account (for new user).

÷	Lo	g In
Please l	og in to access yo Insurance	our West Bend Mutual policy.
Email address		
Password		
		Ø
Remem	ber me	
	Log I	In
Create a	account	Reset password
For assistance 1-800-236-500 hours of 8:00 CustomerSup	e, please contact Te 04 Monday through 1 AM to 4:30 PM CST. port@wbmi.com.	chnical Support at Friday during business . You may also contact us a

To **link more than one policy to your online account**, click on Link Policy on left-side panel. Follow the prompts by entering the policy number and verifying your access to the policy.

WESTBEND	Link Policy
	Link a Policy: this feature allows users that have multiple West Bend policies to associate them to their profile. If you have multiple West Bend policies, you can enter each one here. After doing so, you will be able to see all of your West Bend policies in the application.
Policy Summary	
Pay Bills	Step 1, please enter your
Submit a Claim	policy number.
Policy Documents	Policy number Next
Vehicle ID Cards	
Contacts	This application currently supports Personal and Commercial customers. Surety Bonds are not eligible at this time.
Account Setting	
Link Policy	© 2019 West Bend Mutual Insurance Company 1900 South 18th Ave., West Bend, WI 53095 I
Sign Out	🛗 🞯 <mark>9</mark> in 💙 f

To **select paperless invoicing or policy documents**, click on Account Settings link and drop-down the Paperless Documents section. Check the box for the documents desired to be paperless. If you have more than one billing account, select for each. Selecting for paperless Billing Statements will result in a reduced service fee.

WEST BEND	
	Account Settings
	Insured Portal Account Portlet
Policy Summary	Personal Information
Pay Bills	> Notifications
Submit a Claim	Paperless Documents
Policy Documents Contacts	Receive digital versions of billing statements and policy documents and stop receiving paper versions in the mail. Toggle on (\checkmark) option for each type. Then, click the "UPCATE" button to save your settings.
User Access Account Settings	Billing Account Billing Statements Policy Documents
Link Policy	UPDATE
sign out	Change Password

When selecting paperless, a pop-up will appear to ensure acceptance of the Paperless Policy Consent Agreement before selecting the update button. Select the "Update" button to save these changes.

To **make a payment or set-up an automatic payment rule**, go to the Pay Bills or Pay Now link after logging into your account.



From this screen, policyholders can make a one-time payment using bank or credit card information. To set up automatic payments, policyholders will select either Payments at the top of the page or the Action dropdown to add an Auto Pay Rule (using a checking or savings account only). Once set-up, you can control and change the bank and payment information by logging in (see below).

WES	TBEND			CONTACT US SIGN OUT
Account Summary Pay	/ments			
Account Summary				Hide instructions
View a list of your active If you have more than of have only one account, Click the 'Action' button If you are currently on a (M-F, 8:00am-4:30pm C	e or archived account balance(s). one account, check the 'Pay' box for the account enter the payment information and click the 'Pay for an account to view the account summary, a a monthly Electronic Funds Transfer (EFT) plan a SST). Creating an auto pay rule on this site may	s you want to pay. Enter payment infor y' button. dd a new automatic payment rule, or vi and require changes, you must contact ' result in duplicate payments.	mation and click the 'Pay Sele ew an automatic payment ruk West Bend's Billing departmen	cted' button. If you a. t at 1-800-236-5002
Type: Active v Go				1-1 of 1
Account Number	- Payment for \$0.00 is due on 0	3/08/2019.		Action -
Payment for: Method of payment: *	Premium Payments Select a method of payment	Pay on: * Payment amount: *	04/25/2019 Due an: 02/08/2019 \$0.00 Amount due: \$0.00	View account summary Add auto pay rule View auto pay rules
				PAY

To update the Bank Account or Maximum Withdrawal Threshold on an Auto Pay Rule, click on Pay Bills on the left-side options and perform the following steps:

WE	EST BEND®	
Account Summary	Payments 🔹	
Account Summ	Payment Activity	
	Automatic Payment Rules	
View a list of your	Methods of Payment	lance(s).
If you have more have only one acc	ount, enter the payment info	, ay' box for the prmation and click

Please N	ote: You may	y only create an auton	satic payment i	rule using a bank accou	nt (checking or saving). Credit or debit	cards are not al	lowed.	
View a lis	t of your aut	tomatic payment rules						
Select an	account from	m the 'account' list to	review automa	tic payment rules for or	ly one account.			
Click the	arrow buttor	n in the 'Actions' colum	nn to view, upo	sate, or delete the autor	natic payment rules.			
(M-F, 8:0	e currently o Ioam-4:30pm	n a monthly Electronic n CST). Creating an au	to pay rule on	er (EPT) plan and requir this site may result in d	e changes, you must contact West Ber uplicate payments.	ors Billing depart	tment at 1-800-	236-5002
ccount nu	mber:							
All active a	mber: iccounts v							1-1 of
All active a	mber: accounts v						ADD AUT	1-1 of TO PAY RULE
All active a	nber: ccounts v Rule ID	Account Number	Customer	Rule Type	Payment Amount	Frequency	ADD AUT Start Date End Date	1-1 of TO PAY RULE Scheduled Payments
All active a Actions	Rule ID 46803	Account Number	Customer	Rule Type Pay on Bill due date	Payment Amount Invoice amount due, max: \$10.00	Frequency Date due	ADD AUT Start Date End Date 04/18/2019	1-1 of TO PAY RULE Scheduled Payments None

Review the APR and click Update to make changes.

View/Update Auto	View/Update Auto Pay Rule - Account Number				
If you are just viewing the in To make changes, click Upd	formation, click Close when you are finished. ate and you will be guided through the Update workflow.				
General Information					
Rule ID:	1363418				
Account Number:					
Customer:					
Status:	Active				
Managed by:	Customer managed				
Payment Information					
Payment method :	1234555				
Rule type:	Pay on Bill due date				
Frequency:	Date due				
Payment amount:	Invoice amount due up to maximum set limit of \$20.00				
Total amount:	Invoice amount due				
Start payments on:	06/09				
NOTE: This is computed by computed amount as the unit	con current biller policy. Please note your automatic payment will contain the biller policy at that time				
UPDATE CLOSE					

To make changes to the bank account, click on the Payment Method dropdown and select a different account or add a new bank account. Select desired account and hit Continue.

Update Auto Pay Rule			0
Select Payment Method			
Select the payment method and click	Continue.		
Account:			
Payment method: *	1234555	V	
CONTINUE			

To update the maximum withdrawal threshold, enter the desired max limit or leave blank for no limit.

Update Auto Pay R	ule - Account	0
Enter Information		
Complete the information be	elow, and click Continue.	
Payment Method:	1234555	
Rule type:	Pay on Bill due date	
Frequency:	Date due	
Automatically pay every new Payment amount:	r invoice amount due up to a specified maximum amount Invoice amount due	
Maximum amount:	20.00 (leave blank for no max.)	
Start payments on:	06/09/2021	
CONTINUE BACK	CANCEL	

Then Submit to accept all changes.

Update Auto Pay Rule	- Account	0
Verify Information		
Please verify the automatic pay	nent rule information below.	
Account:		
Payment Method:	1234555	
Rule type:	Pay on Bill due date	
Frequency:	Date due	
Payment amount:	Invoice amount due up to maximum set limit of \$200.00	
Total amount:	Invoice amount due	_
NOTE: This is computed based computed amount as per the .	current biller policy. Please note your automatic payment will contain the policy at that time	_
SUBMIT BACK C	06/09/2021 ANCEL	_