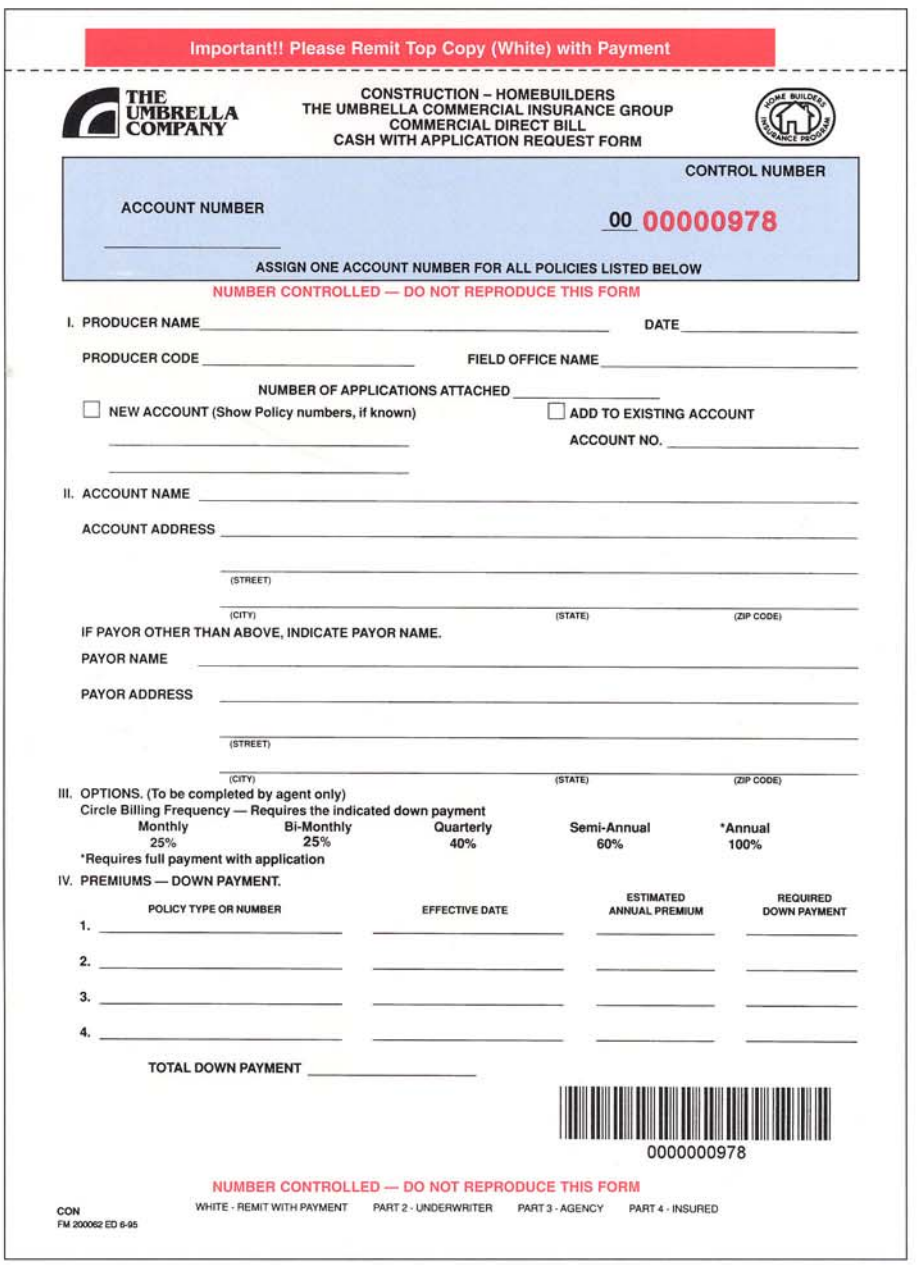
CASE STUDY:
INSURANCE INDUSTRY COMMERCIAL DIRECT BILL

- Paperwork management is of vital importance to insurance companies. To facilitate customer service, this insurance company added a bar code to its Commercial Direct Bill System form.
  - The form is completed at the field offices and sent to the home office for processing.
    - Once at the home office, the bar code in the lower right hand corner is scanned. The bar code is registered as a live policy number.
      - The end user reports that the bar code increases the accuracy and the speed of the entire direct bill system process.



Important!! Please Remit Top Copy (White) with Payment

THE UMBRELLA COMPANY

CONSTRUCTION – HOMEBUILDERS
THE UMBRELLA COMMERCIAL INSURANCE GROUP
COMMERCIAL DIRECT BILL
CASH WITH APPLICATION REQUEST FORM

HOME BUILDERS INSURANCE PROGRAM

CONTROL NUMBER

ACCOUNT NUMBER _____

00 00000978

ASSIGN ONE ACCOUNT NUMBER FOR ALL POLICIES LISTED BELOW

NUMBER CONTROLLED — DO NOT REPRODUCE THIS FORM

I. PRODUCER NAME _____ DATE _____

PRODUCER CODE _____ FIELD OFFICE NAME _____

NUMBER OF APPLICATIONS ATTACHED _____

☐ NEW ACCOUNT (Show Policy numbers, if known) ☐ ADD TO EXISTING ACCOUNT

ACCOUNT NO. _____

II. ACCOUNT NAME _____

ACCOUNT ADDRESS _____

(STREET)

(CITY) (STATE) (ZIP CODE)

IF PAYOR OTHER THAN ABOVE, INDICATE PAYOR NAME.

PAYOR NAME _____

PAYOR ADDRESS _____

(STREET)

(CITY) (STATE) (ZIP CODE)

III. OPTIONS. (To be completed by agent only)
Circle Billing Frequency — Requires the indicated down payment

Monthly	Bi-Monthly	Quarterly	Semi-Annual	*Annual
25%	25%	40%	60%	100%

*Requires full payment with application

IV. PREMIUMS — DOWN PAYMENT.

	POLICY TYPE OR NUMBER	EFFECTIVE DATE	ESTIMATED ANNUAL PREMIUM	REQUIRED DOWN PAYMENT
1.				
2.				
3.				
4.				

TOTAL DOWN PAYMENT _____

0000000978

NUMBER CONTROLLED — DO NOT REPRODUCE THIS FORM

CON
FM 200062 ED 6-95

WHITE - REMIT WITH PAYMENT PART 2 - UNDERWRITER PART 3 - AGENCY PART 4 - INSURED

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