

# Mailing address in CA, CT, IL, MA or TX- ACH only



If you select the payment method "Credit Card" and the client's mailing address is in CA, CT, IL, MA or TX, there will be some warnings and exceptions that you will see guiding you to change the payment method to ACH to continue. Use the directions below to see the warnings/exceptions and how to clear them.

1

This client's mailing address is in CT and selected Credit Card for payment method.

Do you want to pay 12 months and the one time setup fee for the locations in this proposal?

Pay In Full:

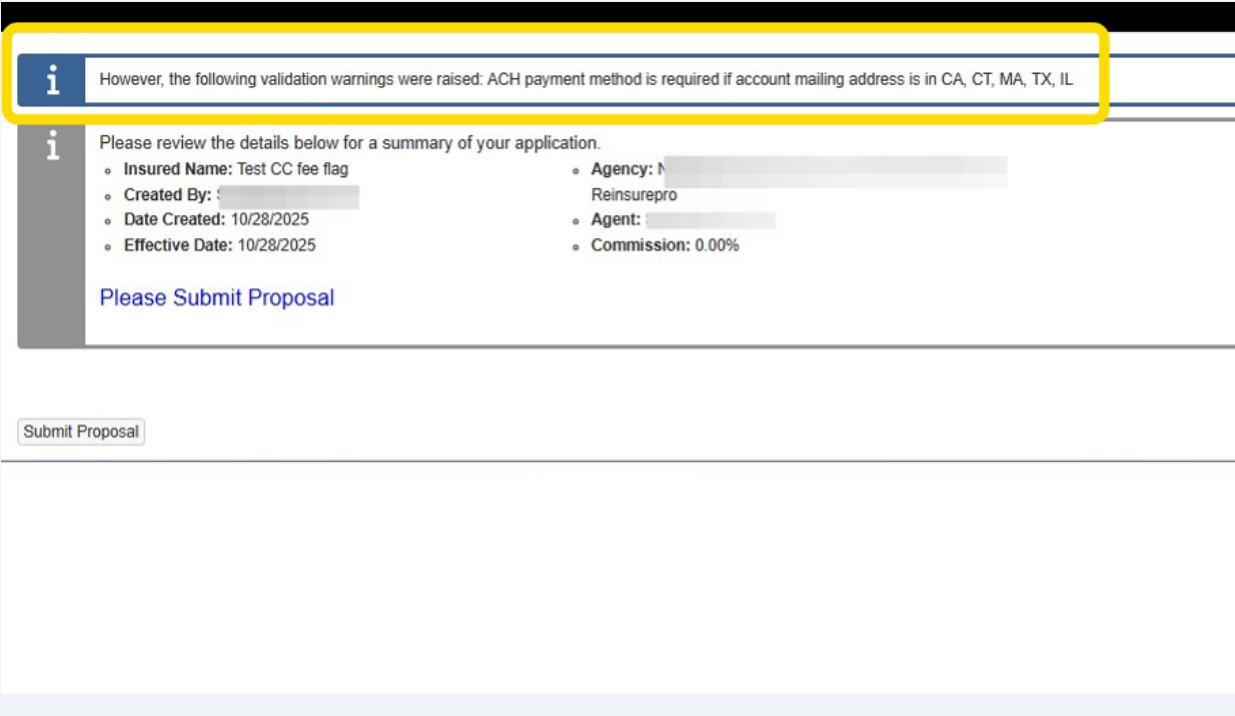
You are Paying Monthly.

Payment Method ⓘ

ACH  Credit Card

[Continue >](#)

2 After clicking "Continue" you will notice on the next page there is a warning at the top that says "However, the following validation warnings were raised: ACH payment method is required if account mailing address is in CA, CT, MA, TX, IL"



However, the following validation warnings were raised: ACH payment method is required if account mailing address is in CA, CT, MA, TX, IL

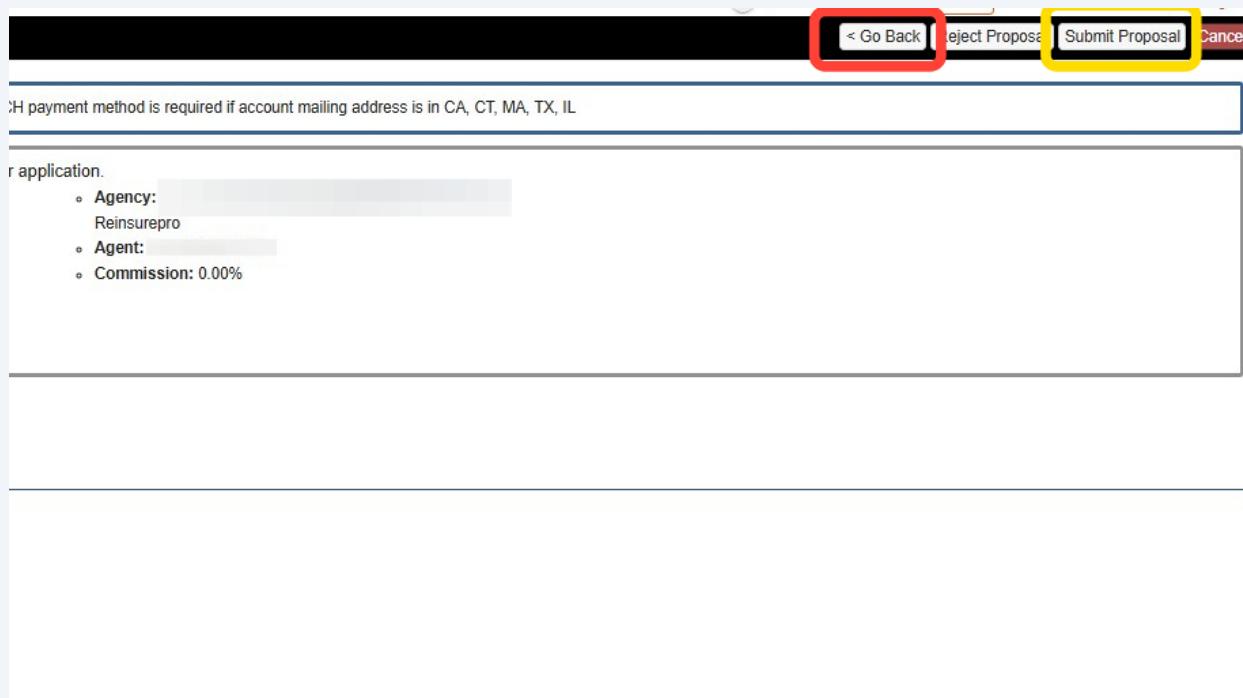
i Please review the details below for a summary of your application.

Insured Name: Test CC fee flag	Agency: N
Created By: [REDACTED]	Reinsurepro
Date Created: 10/28/2025	Agent: [REDACTED]
Effective Date: 10/28/2025	Commission: 0.00%

[Please Submit Proposal](#)

[Submit Proposal](#)

3 From here you can simply click "Go Back" and change the payment method to "ACH" and then continue and Submit Proposal. If you missed the message on this page and already clicked "Submit Proposal" then continue on for further directions.



ACH payment method is required if account mailing address is in CA, CT, MA, TX, IL

[Go Back](#) [Reject Proposal](#) [Submit Proposal](#) [Cancel](#)

application.

Agency: N	Reinsurepro
Agent: [REDACTED]	
Commission: 0.00%	

4 Once the Proposal has been Submitted, you will see the same warning message and there will be an UW Exception if the payment method was not changed. Click "UW Exception Management".

Save Successful. However, the following validation warnings were raised: ACH payment method is required if account mailing address is in CA, CT, MA, TX, IL

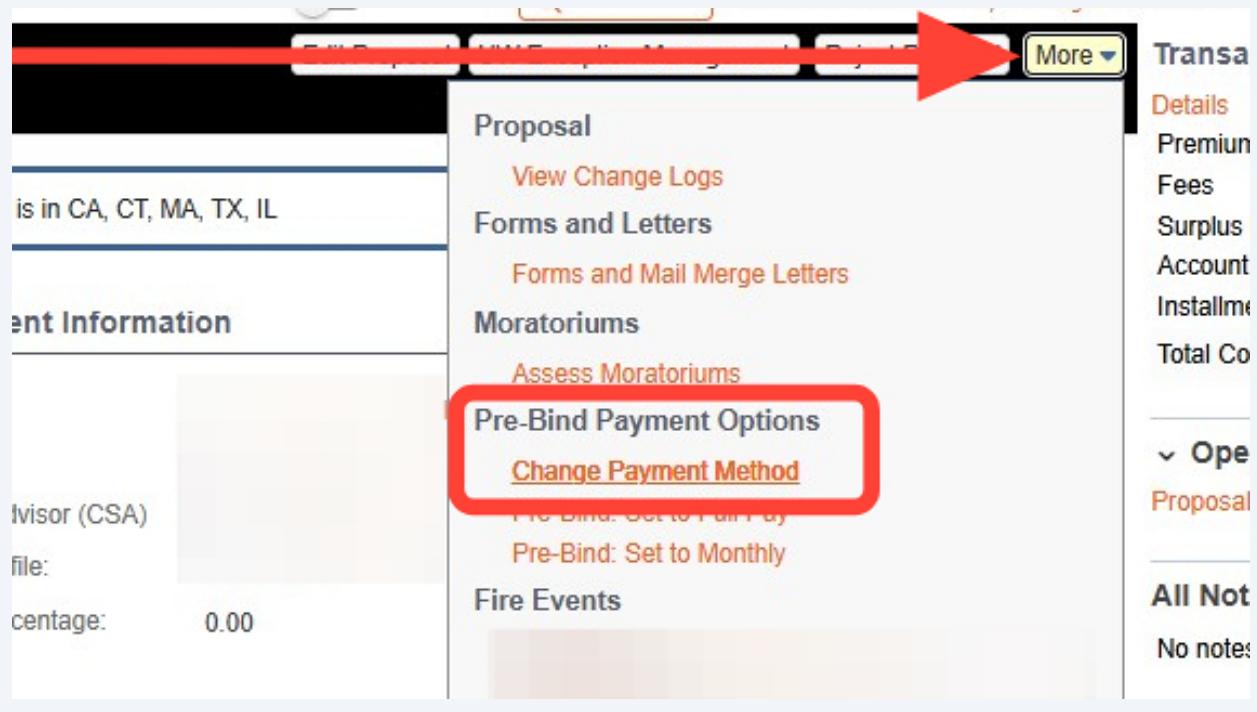
Detail		Agency and Agent Information	
From:	Test CC fee flag	Agency:	
Type:		Agent:	
Number:	P00008826	Client Service Advisor (CSA):	
Date:	10/28/2025	Commission Profile:	
Date:	10/28/2026	Commission Percentage:	0.00
	Submitted	AMP Fee Rate:	0.00
	Application	Referral Percentage:	0.00
Information			
Full:	No		
Method ⓘ	Credit Card		
Level:	Account Bill		
Account:	Test CC fee flag		
Frequency:	Monthly		

5 The UW exception will say "ACH Required - ACH payment method is required if account mailing address is in CA, CT, IL, MA, TX". Click Cancel to take you back to the Proposal to fix this issue.

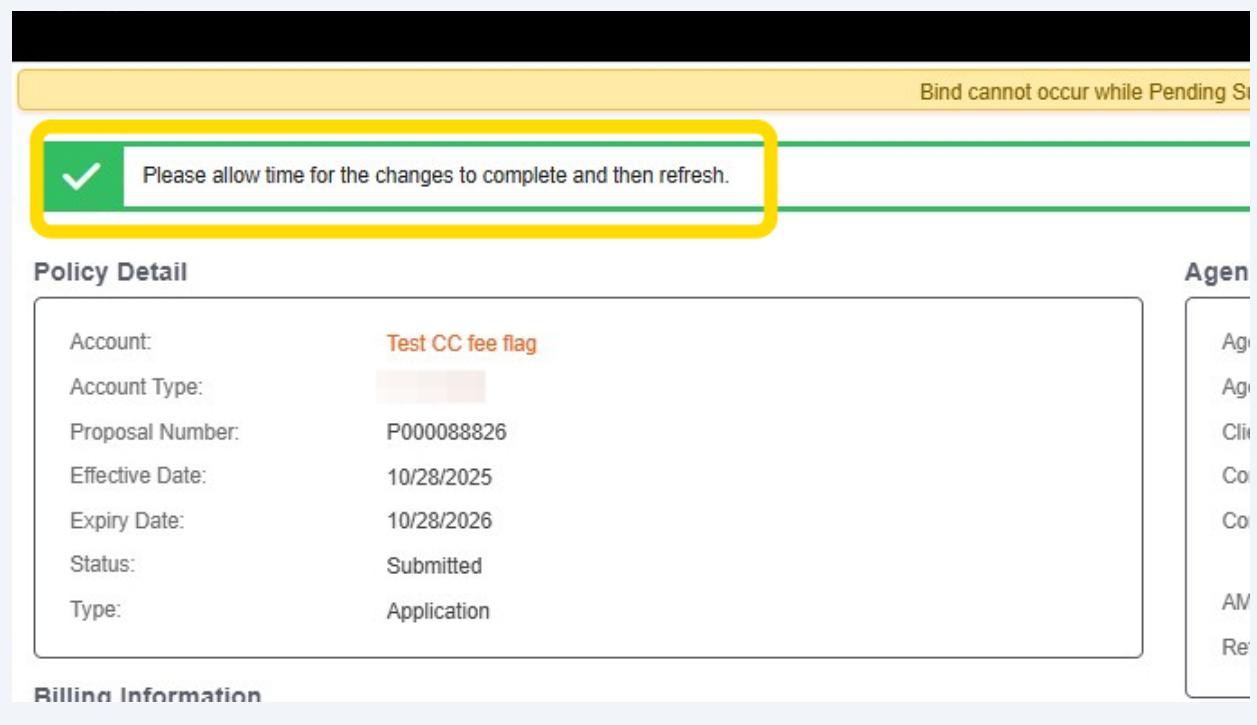
The following exceptions were triggered on validation. You may choose to modify the application or bypass the exception. You can only bypass exceptions in which you have sufficient permission.

ACH Required - ACH payment method is required if account mailing address is in CA, CT, IL, MA, TX

6 In the "More" dropdown menu, Click "Change Payment Method". This will prompt a pop box to ask, "Are you sure you want to fire this event?". Click "OK".



7 The system is now processing the request to change the Payment Method from Credit Card to ACH. Allow it 30 seconds at least to process and then refresh your screen.



8 Once you refresh, you are looking for the "Payment Method" section to now show "ACH" instead of "Credit Card".

**Policy Detail**

Account:	Test CC fee flag
Account Type:	
Proposal Number:	P000088826
Effective Date:	10/28/2025
Expiry Date:	10/28/2026
Status:	Submitted
Type:	Application

**Billing Information**

Pay In Full:	No
Payment Method <small>(i)</small>	ACH

9 To clear the UW exception now, Click "UW Exception Management"

[Edit Proposal](#) [UW Exception Management](#) [Reject Proposal](#) [More ▾](#)

ies exist.

**Agent Information**

ce Advisor (CSA)	
n Profile:	
n Percentage:	0.00
ate:	0.00
rcentage:	0.00

**Transaction**

- Details
- Premium
- Fees
- Surplus Lines
- Account Setup
- Installment Payment
- Total Cost

**Open Tasks**

- Proposal Creation

**All Notes**

No notes. Click here to add a note.

**Recent Events**

10

The exception should now be gone, if no other exceptions, click "Cancel", refresh your screen and proceed with proposal. If there were more exceptions, please review those and make any necessary fixes or wait for notification of UW's decision.

