

Client: I'm unable to share this client's name due to contractual reasons.

Project: Bill Pay

Sample: Status Tagging Document

This is an internal tagging document for a national insurance client. The development team required tags made for their content management system. This document includes the chatbot content that uses the tags.

Data Needs:

CollectionDate	Date account was transferred to collections
PstDueDate	Date account was marked past due
LateFee	Amount of late fee applied to account
FeeDate	Date fee was applied to account
CancelNotifDate	Date cancelation notice was mailed
PayDeadDate	Last date for a payment to post before the policy is cancelled
PayPostDate	Date payment posted
PayLateDate	Last date for a payment to post before a late fee is accrued
HoldStrtDate	Date cat hold begins
HoldEndDate	Date cat hold ends
ReinDate	Date policy will be reinstated
CancelDate	Date policy was cancelled
NxtDueDate	Date next payment is due
PayProcDate	Date payment has been processed
Amount transferred to collections	
Past due amount including late fees	
Amount paid to account	
Total amount due on account	
Difference between amount due and amount paid	
Amount due next billing cycle	

Statuses Content:

Collections:

It looks like your account is in collections as of [**CollectionDate**]

The **amount transferred to collections was \$###.##**

Past due: In warning

As of [**PstDueDate**], your account is considered past due. You incurred a late fee of [**LateFee**] on [**FeeDate**] that will reflect on the next billing cycle. **This will bring your past due amount to \$###.##.** Because of the length of time your account has gone without payment, you were mailed a notice of cancellation on [**CancelNotifDate**].

Past due: Not in warning

As of [**PstDueDate**], your account is considered past due. You incurred a late fee of [**LateFee**] on [**FeeDate**] that will reflect on the next billing cycle. **This will bring your past due amount to \$###.##.** If a payment isn't made by [**PayDeadDate**] your policy will be cancelled.

Bad payment

It looks like the payment that you made on [**PayPostDate**] to Insurance Client could not be honored by your bank. Please make a replacement payment by [**PayLateDate**] to avoid a [**LateFee**] late fee. If no payment has been made by [**PayDeadDate**] your policy will be cancelled.

On cat hold:

Due to a catastrophic event in your area, your account has been placed in a hold status as of **[HoldStrtDate]**. While your account is in hold it will not go into warn status or cancellation if your regular premium payment cannot be made.

This hold will not stop your payments from processing. If you are able, please continue to make your regular payment on your scheduled due date. This hold is tentatively scheduled to be lifted on **[HoldEndDate]**.

Reinstatement pending:

Thank you for your most recent payment on **[PayPostDate]**! We're happy to say that your policy will reactivate with a lapse as of **[ReinDate]**. After that date, it could take 2-3 business days for your policy to show active on Insurance Client .com and our mobile app.

Cancellation:

It appears that your policy is in a cancellation pending status as of **[CancelDate]**. Your policy is considered cancelled, but it could show as active in our systems while the cancellation is processed. This can take up to 2-3 business days.

Under payment:

It looks like the **payment that you made on [PayPostDate] to Insurance Client of \$###.##** was less than the **total amount due (\$###.##)**. The difference of **\$###.##** has been added to your bill due on **[NxtDueDate]**.

Your next payment will be \$###.##. A quote for next month's bill can be found under "Billing Details" on Insurance Client .com.

If a payment isn't made by **[PayDeadDate]** your policy will be cancelled.

Over payment:

It looks like **the payment that you made on [PayPostDate] to Insurance Client of \$###.##** was more than the **total amount due (\$###.##)**. The difference of **\$###.##** has been deducted from your bill due on **[NxtDueDate]**.

Your next payment will be \$###.##. A quote for next month's bill can be found under "Billing Details" on Insurance Client .com.

Bill current:

The **payment that you made on [PayPostDate] to Insurance Client of \$###.##** was processed on **[PayProcDate]**.

Your next payment will be due on [NxtDueDate] in the amount of \$###.##. A quote for next month's bill can be found under "Billing Details" on Insurance Client .com.