

**HOW TO REVIEW YOUR POLICIES, REQUEST
ENDORSEMENTS, AMENDMENTS,
CANCELLATIONS AND SUBMIT CLAIMS**

POLICY MANAGEMENT

- **ENTER IN YOUR USER NAME AND PASSWORD.**

Quick Quote ▾	Policy and Quote Search
New Application ▾	Quote Number <input type="text"/> Insured Name <input type="text"/> <input type="button" value="Q Search"/>
Renewal ▾	Policy Number <input type="text"/> Insured Name <input type="text"/> <input type="button" value="Q Search"/>
Policy ▾	
Claims ▾	Billing
Profile ▾	Policy Number <input type="text"/> <input type="button" value="Q Search"/>
	Claim
	Claim Number: <input type="text"/> Date Of Loss: <input type="text"/> <input type="button" value="📅"/>
	Name (All loss contacts): <input type="text"/>
	<input type="button" value="Q Search"/> <input type="button" value="🗑 Clear"/> <input type="button" value="🔍 Advanced Search"/>
	Pending Claims Work Items
	<input type="button" value="Pending Items"/> <input type="button" value="Count"/> <input type="button" value="🔄 Refresh"/>

AFTER LOGGING IN YOU WILL BE TAKEN TO THIS SCREEN FROM WHICH YOU WILL BE ABLE TO PERFORM THE FOLLOWING FUNCTIONS:

- **QUICK QUOTES**
- **SUBMIT NEW APPLICATIONS**
- **POLICY**
 - A. **ENDORSEMENT REQUESTS**
 - B. **CANCELLATION REQUESTS**
 - C. **INSTALLMENT PAYMENTS/BILLING INFORMATION**
- **REPORT A CLAIM**
- **USER PROFILE**

SUBMITTING ENDORSEMENT REQUESTS

- **LOG IN USING YOUR USERNAME AND PASSWORD.**

The screenshot displays a navigation menu on the left with options: Quick Quote, New Application, Renewal, Policy, Claims, and Profile. The main content area is divided into three sections: 'Policy and Quote Search', 'Billing', and 'Claim'. Each section contains search fields for 'Quote Number' or 'Policy Number' and 'Insured Name', along with a 'Search' button. Orange arrows point from the 'Search' buttons in the 'Policy and Quote Search' and 'Claim' sections to the text below.

- **YOU WILL ENTER IN EITHER THE POLICY NUMBER OR NAME OF INSURED AND CLICK 'SEARCH'.**

The screenshot shows the main dashboard with navigation tabs for Policy Summary, Billing Summary, Claims Summary, and Document Summary. A search bar is located in the top right. Below the tabs, there are several widgets: a menu with options 'Request Amendment', 'Request Cancellation', 'Submit a Loss', 'View Inspections', and 'Create Claim'; a 'Payments Received' widget showing 0 in the last 30 days; and a 'Last Payment' widget showing a payment of \$1000 on October 15, 2016. Orange arrows point from the 'Request Amendment' option in the menu to the text below.

ON THIS SCREEN YOU MAY:

- **REQUEST AN AMENDMENT**

The screenshot shows the 'Request Amendment' form. It features a rich text editor toolbar with options for Bold (B), Italic (I), Underline (U), and other formatting tools. Below the toolbar is a large text input area. At the bottom of the form, there are two buttons: 'Request' and 'Cancel'. An orange arrow points from the 'Request' button to the text below.

- **ENTER IN YOUR AMENDMENT REQUEST IN THE MAIN BODY AND CLICK 'REQUEST'.**

VIEW INSPECTIONS

Inspections

Next Inspection Date:

Vendor	Date Requested	Date Received	Second Date Requested	Second Date Received	Comments

REQUEST A CANCELLATION OR REINSTATEMENT

Cancel/Flat Cancel/Reinstate [Close](#)

Select Cancel Reason..

Cancellation Description:

CREATE A CLAIM

First Notice Of Loss ✓ Submit ✗ Cancel

Policy
Policy Number: 44051
Policy Type: Select...

Loss
Date of Loss:
Time of Loss:
Reported By:
Police Report #:
Claim Type: Select...

Named Insured
Prefix:
First Name:
Middle Name:
Last Name:
Suffix:
Company Name:

Mailing Address
Address One:
Address Two: Please fill out this field.
City:
State: Select...
Zip Code:

Additional Information
Home Phone:
Cell Phone:

Loss Location
 Same as Mailing Address
Address One:
Address Two:
City:
State: Select...
Zip Code:

Contact
Name:
Primary Phone #:
Secondary Phone #:
Email Address:

Loss Description

Attachments

Upload

\$id	DolId	Com...	DolFi...	FileT...	DolD...	DolD...	DolD...	DolT...	DolD...	DolC...	DolC...	DotP...	DotQ...	DolT...	CanT...	CanU...
2	1	Selec...	5	Du1x...	First ...	Claims	Claims	Repo...	DF17...	Syste...	3/27/...			false	false	false

10 items per page 1 - 1 of 1 items

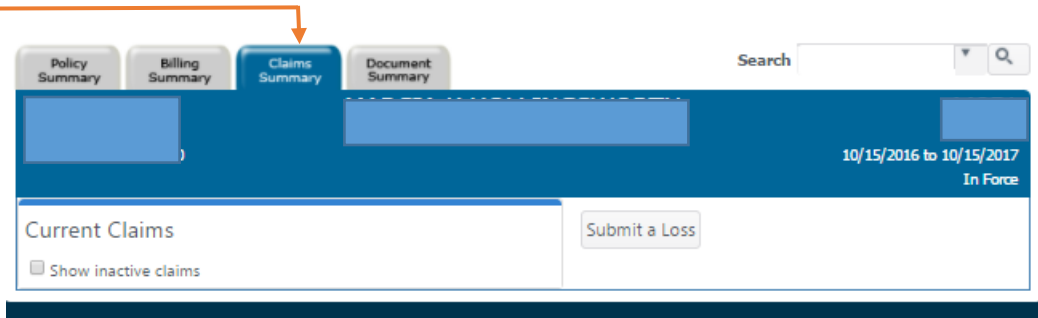
✓ Submit ✗ Cancel

- COMPLETE ALL OF THE YELLOW SHADED AREAS.
- UPLOAD ANY ATTACHMENTS, PHOTOS, DOCUMENTATION
- CLICK 'SUBMIT' WHEN FINISHED.

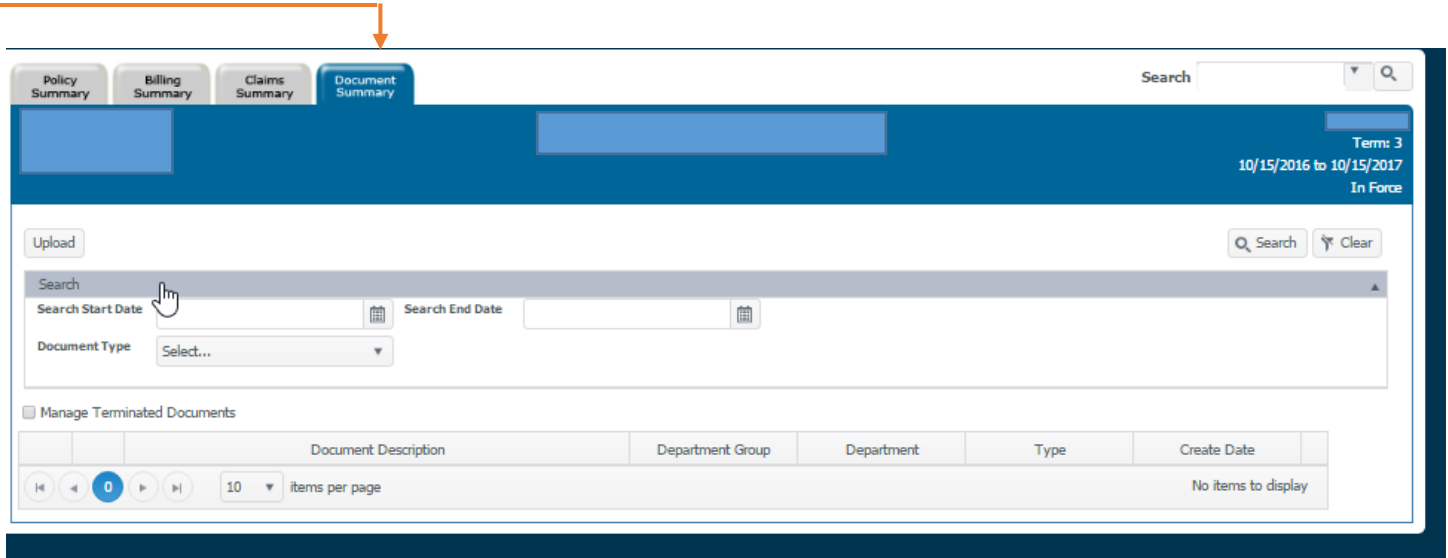
- **BILLING SUMMARY – FROM THIS TAB YOU CAN VIEW THE BILLING AND PAYMENT HISTORY OF THE SELECTED POLICY.**

Policy Transactions											
	Transaction Type	Create Date ▼	Posting Date	Due Date	Amount	Open	Balance	Method	Reference Number	User	
	Payment	10/15/2016 12:00:00 AM	10/15/2016			(\$896.00)	\$0.00	(\$4,336.00)	CASH		System Generated ▲
▶	Premium Installment	10/15/2016 12:00:00 AM	10/15/2016	10/15/2016		\$896.00	\$896.00	(\$3,440.00)			System Generated
	Payment	10/15/2015 12:00:00 AM	10/15/2015			(\$896.00)	\$0.00	(\$3,440.00)	CASH		System Generated
▶	Premium Installment	10/15/2015 12:00:00 AM	10/15/2015	10/15/2015		\$896.00	\$896.00	(\$2,544.00)			System Generated
	Payment	10/15/2014 12:00:00 AM	10/15/2014			(\$2,544.00)	\$0.00	(\$2,544.00)	CASH		System Generated
▶	Premium Installment	10/15/2014 12:00:00 AM	10/15/2014	10/15/2014		\$2,544.00	\$2,544.00	\$0.00			System Generated ▼

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- **CLAIMS SUMMARY – THIS TAB ALLOWS YOU TO VIEW THE POLICY’S CLAIM STATUS.**



- **DOCUMENT SUMMARY – THIS TAB WILL ALLOW YOU TO VIEW THE POLICY FORMS, ENDORSEMENTS, ETC AND UPLOAD DOCUMENTS TO THE POLICY.**