

Agency Portal

Producer Training Materials

Introduction

This document contains all of the Performance Support Materials for Agency Portal. The purpose of the Performance Support Materials document is to provide end users with a “one-stop-shop” for supplemental materials related to PSIC’s upgraded platform. Representatives should reference this document for reminders on process flows and common questions. These are organized into the following sections:

- **Job Aids:** Process steps/instructions of important procedures for you to remember when handling policies in Duck Creek.
- **FAQs:** User’s Frequently Asked Questions (FAQs) regarding the Duck Creek system.
- **Glossary of Terms:** Key definitions of terms used in Duck Creek.

To navigate this document, click on the hyperlinks in the Table of Contents, located on page 3. This will take you directly to the topic you wish to read about.

DISCLAIMER

The insurance policy and corresponding underwriting guidelines, not this communication, forms the contract between the insured and the insurance company. The policy may contain limits, exclusions, and limitations that are not detailed in this communication. Coverages may differ by state. Changes made to the policy through this new portal may require further review and/or approval from underwriting prior to the changes taking effect. The insurance policy is bound by the insurance company.

Table of Contents

| | |
|--|----|
| Introduction..... | 2 |
| Job Aids..... | 5 |
| How do you login to Agency Port (AP)? | 6 |
| How to Quote in the new platform..... | 7 |
| Casualty: Quick Quote:..... | 8 |
| Casualty: Full Quote: | 8 |
| Casualty: What if my VIN number does not validate? | 8 |
| Property: Full Quote:..... | 9 |
| Property: How to update Coverage A, Replacement Cost, and other Dwelling Characteristics | 9 |
| Property: How to add scheduled Personal Property | 12 |
| Property: How to submit for bind via Mortgage/Escrow Bill..... | 13 |
| What is the Pre-Bind referral process? | 13 |
| How to Look up a Quote/Policy on the new platform | 15 |
| AssureSign – The new E-signature | 18 |
| What if my insured does not have an email address? | 19 |
| What are the Self-Service options for producers?..... | 20 |
| How do I inquire a policy and view documents? | 20 |
| How do I process an Endorsement?..... | 21 |
| Casualty: Endorsement: How to Change the Mailing Address and other contact information | 22 |
| Casualty: Endorsement – How to change coverage..... | 23 |
| Casualty: Endorsement: How to add a Vehicle/Vessel or a Driver midterm | 23 |
| Property: Endorsement – How to update the mortgage/escrow information..... | 24 |
| Property: Endorsement - How to change the mailing address and other contact information..... | 25 |
| Property Endorsement – How to change the effective date | 26 |
| Property: Endorsement - How to change coverage..... | 26 |
| Property Endorsements Training Video | 27 |
| How to Cancel a Policy per the Insured’s Request..... | 28 |
| How to access Producer reports | 29 |
| Frequently Asked Questions (FAQs)..... | 30 |

What programs are being released onto the new platform? 30

What are the major differences I can expect to see? 30

How do I access the new platform? 30

Will I be able to bridge in from any comparative raters? 30

I received an error message in red text. What does the red text signify? 30

I received an error message in blue text. What does the blue text signify? 30

I received an error message in yellow text. What does the yellow text signify? 31

Will we be notified of current moratoriums and regulation changes? 31

Will users be able to upload documents to quotes/policies on the new platform? 31

What is the new Application signature process? 32

How long do we have to sign the application? 32

Will producers be able to process endorsements and cancellations on the new platform? 32

Work Item Assistant Review 33

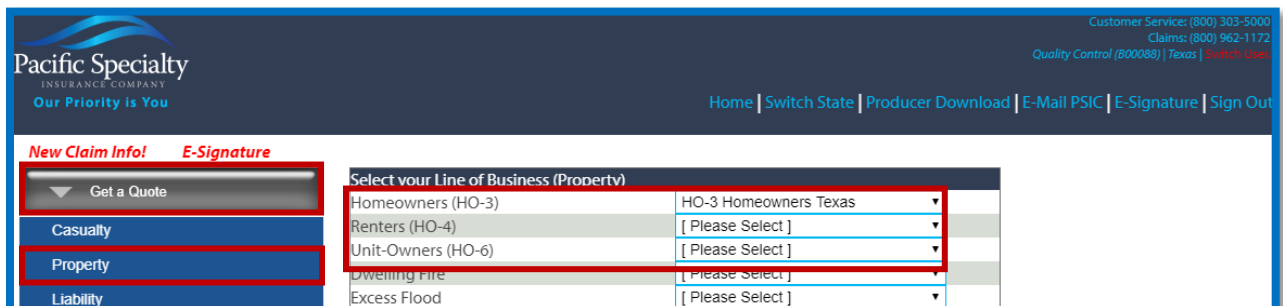
Glossary of Terms 34

Job Aids

How do you login to Agency Port (AP)?

Step 1:

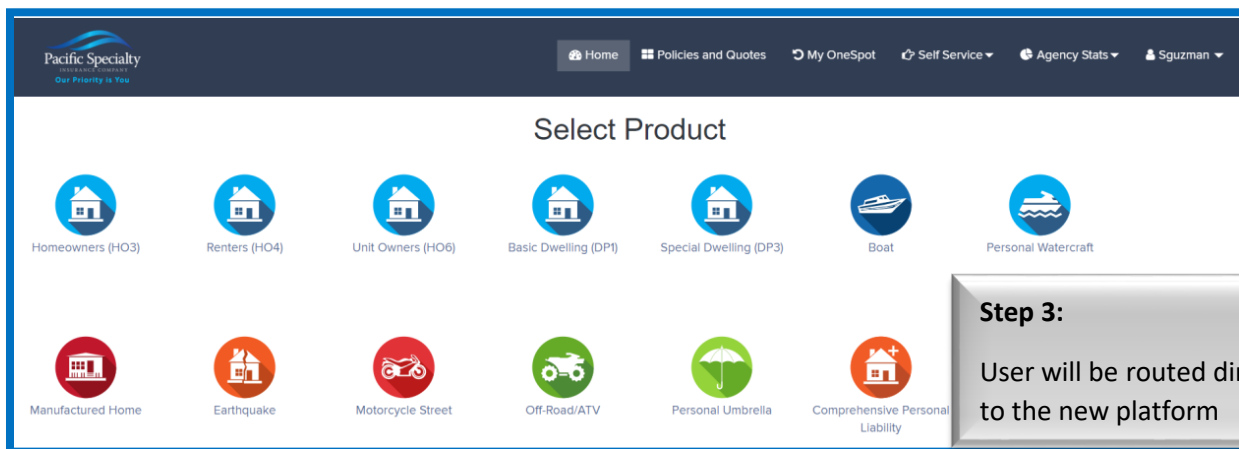
- Navigate to www.pacificspecialty.com
- Click – “Sign Into My Account”
- Enter applicable passwords



Step 2:

- Click on “Get a Quote” drop down
- Select the program
- Choose the “Line of Business”

Please note that all programs may not yet be on the new platform. We will be releasing products regularly.



Step 3:

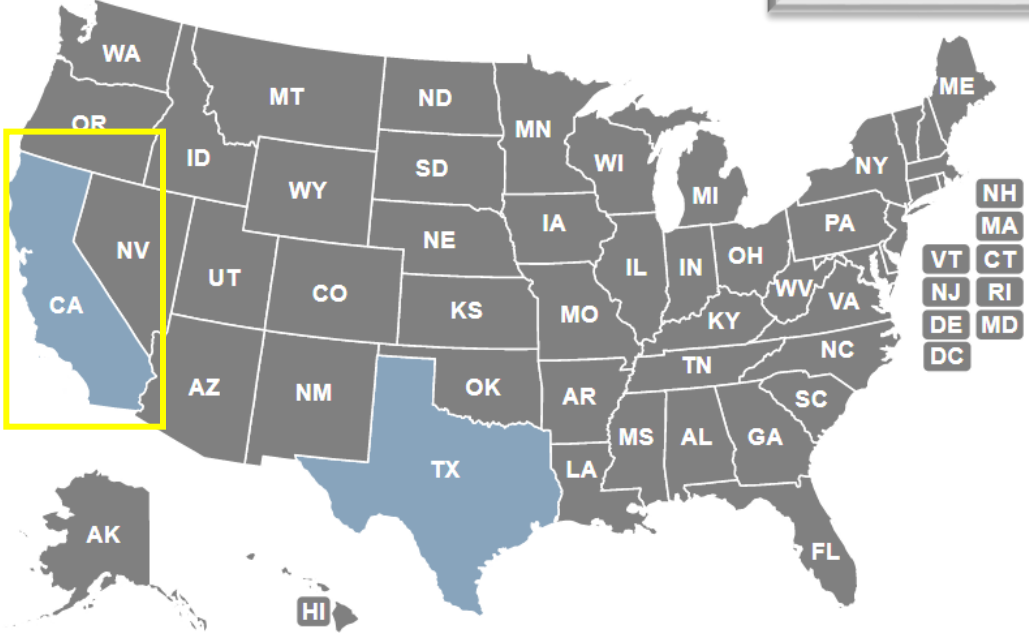
User will be routed directly to the new platform


How to Quote in the new platform

Choose State

Step 1:

- Choose state





[Home](#)
[Policies and Quotes](#)
[My OneSpot](#)
[Self Service](#)
[Agency Stats](#)
[Sguzman](#)

Select Product

Homeowners (HO3)

Renters (HO4)

Unit Owners (HO6)

Basic Dwelling (DP1)

Special Dwelling (DP3)

Boat

Personal Watercraft

Manufactured Home

Earthquake

Motorcycle Street

Off-Road/ATV

Personal Umbrella

Step 2:

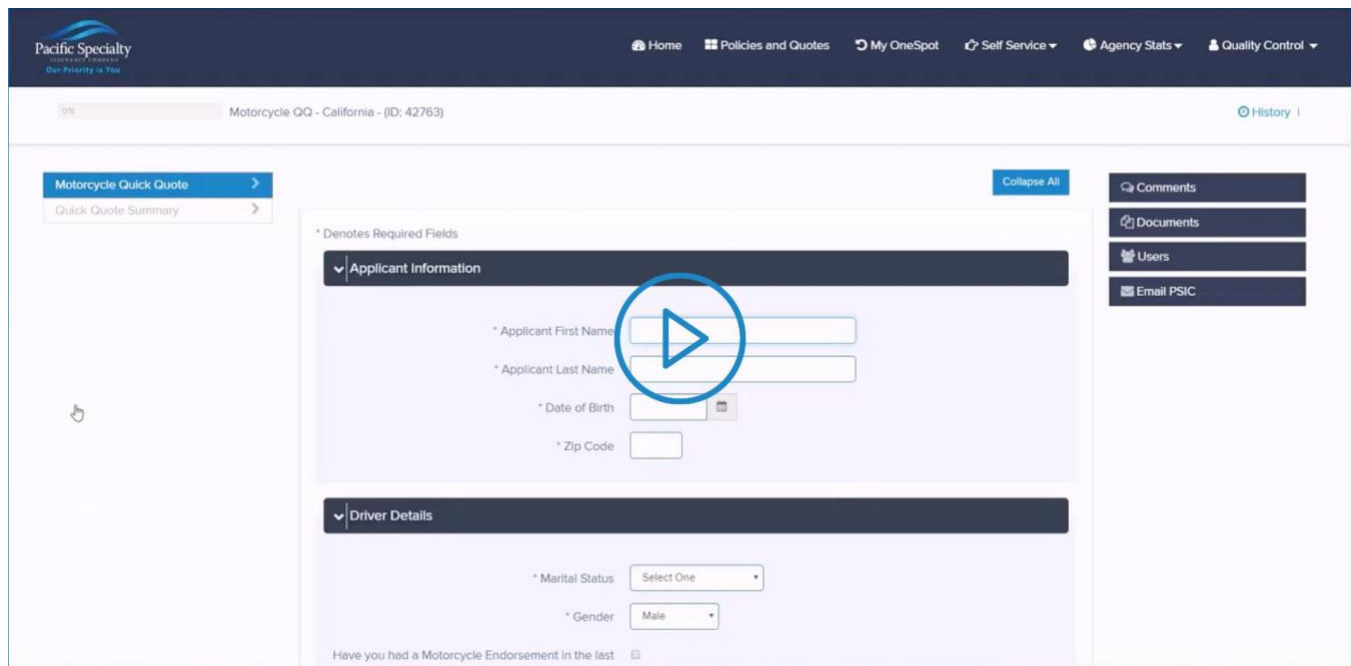
- Select LOB
- Selections may vary based off the state/product combination

Casualty: Quick Quote:

What is a Quick Quote? A quick quote is a tool for producers to obtain a basic quote for our street and off-road products with minimal fields. This is perfect for those riders who are looking to purchase a specific type of vehicle, but do not necessarily have a VIN number yet. Please keep in mind that this rate is not final. Premium is subject to change upon information received during the full quote process.

Casualty: Full Quote:

For information on a full quote for casualty lines, please refer to the attached video. The [video linked below](#) will provide a high-level overview of the quote process.



Casualty: What if my VIN number does not validate?

If a VIN is invalid it could be for a few reasons. We are either not accepting that specific type of vehicle, or the annual new model sequences have not been disbursed by the manufactures yet.

! Either the Vin entered is invalid or the VIN entered is an UTV; we are not accepting any UTV business. Please remove this VIN if you wish to continue.

* VIN (for a more accurate quote)

To resolve this, please contact customer service. We will either add the vehicle model sequence to our system allowing you to proceed, or we will inform you of the vehicle's ineligibility.

Property: Full Quote:

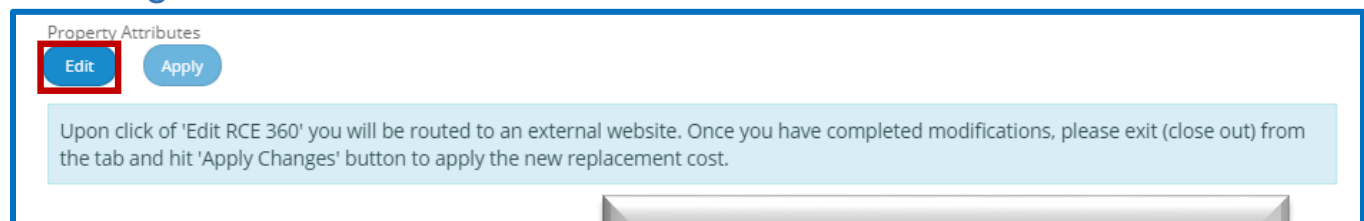
For information on a full quote for casualty lines, please refer to the attached video. The [video linked below](#) will provide a high-level overview of the quote process.



The screenshot shows the Pacific Specialty web application interface. At the top, there is a navigation bar with links for Home, Policies and Quotes, My OneSpot, Self Service, Agency Stats, and Quality Control. Below the navigation bar is a 'Choose State' section featuring a map of the United States with a play button icon overlaid on the map. Below the map, there are two sections: 'Things to Know' with an 'Alerts' button, and 'Recent Quotes and Policies' with a table.

| Reference ID | Name | Status | Sub Status | LOB | Effective | Duration (Days) |
|-------------------|------------------|--------|------------|---------------|------------|-----------------|
| QN-G0001000123143 | Angelina Mullins | | | Homeowners CA | 08-16-2019 | 0 |
| QN-G0001000123142 | Pete Claus | | | Homeowners CA | 05-16-2019 | 0 |

Property: How to update Coverage A, Replacement Cost, and other Dwelling Characteristics



The screenshot shows the 'Property Attributes' section of the web application. There are two buttons: 'Edit' and 'Apply'. The 'Edit' button is highlighted with a red box. Below the buttons is a light blue informational box with the following text:

Upon click of 'Edit RCE 360' you will be routed to an external website. Once you have completed modifications, please exit (close out) from the tab and hit 'Apply Changes' button to apply the new replacement cost.

Step 1:

- From the Home Information tab, click "Edit".

OWNER INFORMATION

| | | | |
|------------------|--------------------|------------------|--------------------------------|
| Name: | test test | Date Entered: | 11/14/2019 |
| Street: | 24029 BEARSKIN CIR | Date Calculated: | 11/14/2019 |
| City, State ZIP: | MURRIETA, CA 92562 | Created By: | Pacific Specialty Web Services |
| Country: | USA | User: | Pacific Specialty Web Services |

ESTIMATED REPLACEMENT COST

Calculated Value: **\$489,174.79**
[Need help with this value?](#)
[View Market Value](#)

The estimated replacement costs above represent the approximated costs required to rebuild a similar structure generally described herein in the referenced geographic market. It includes pricing for labor, materials, applicable permits and fees, sales tax, and contractor's overhead and profit; it does not include costs for major excavation or foundation work. The estimated replacement cost is based on one of several sources of information in estimating a replacement cost and the event of damage or loss. The estimated replacement cost is based on the responsibility to obtain adequate coverage.

(Replacement cost includes all applicable permits, fees, and taxes.)

[Adjust Value](#) [Edit](#) [Finish](#)

Step 2:

- Upon redirection to the 360V website, either "edit" to adjust the dwelling characteristics, or "adjust value" to update the dwelling coverage.

1 to 4 Family (101 N MARY ST CRANE TX 79731)

*Year Built: 1975
(Example: 1980)

[Additions](#)

*Total Finished Square Feet: 3022
Includes: finished area in attic/additions.
 Excludes: finished or unfinished basement area and built-in or attached garages.
 Above sq. ft. includes finished basement area:

[Home Configuration Wizard](#)

Quality Grade: Economy

[Quality Wizard](#)

Use: Single Family Detached

Number of Stories: 1 Story

Foundation Type: Concrete Slab 100% [Add Row](#)

Exterior Wall Finish: Siding - Vinyl 15% [Add Row](#)
 Brick Veneer 85% [Add Row](#)

Roof Cover: Composition - 3 Tab Shingle 100% [Add Row](#)

Kitchen(s): [More Detail](#) Large - (15'x11') 1 [Add Row](#)

Bathroom(s): [More Detail](#) Half 1 [Add Row](#)
 Full 2 [Add Row](#)
 1.5 1 [Add Row](#)

Garage/Carport: 3 Car (673 - 780 sq. ft.)

Style: Attached / Built-In

[Add New](#)

Year Roof Installed or Replaced: 2015

- EXTERIOR
- INTERIOR
- ROOM INFORMATION
- ADDITIONAL FEATURES

Expand All Collapse All

[Back](#) [Calculate](#)

Step 3:

- If "edit" was selected in the prior step, edit applicable fields, then click "Calculate" once finished.

Adjust Value Help

Calculated Value: \$489,174.79

Replacement Cost Adjustment:

Reason: No Adjustment ▼

Dwelling Coverage Amount Adjustment:

Reason: Insured's Request ▼

Total Dwelling Coverage Amount: \$ |

Step 4:

- If "adjust value" was selected in step 2, select the reasons for the adjustment, then input the Total Dwelling Coverage Amount. Please note this amount cannot be less than the calculated value
- Click "Submit" once done.

OWNER INFORMATION

| | | | |
|--------------------|-----------|--------------------------------|------------|
| Name: | test test | Date Entered: | 11/14/2019 |
| Street: | | Date Calculated: | 11/14/2019 |
| 24029 BEARSKIN CIR | | Created By: | |
| City, State ZIP: | | Pacific Specialty Web Services | |
| MURRIETA, CA 92562 | | User: | |
| Country: | USA | Pacific Specialty Web Services | |

ESTIMATED REPLACEMENT COST

Calculated Value: **\$489,174.79**

[Need help with this value?](#)
[View Market Value](#)

The estimated replacement costs above represent the approximated costs required to rebuild a similar structure generally described herein in the referenced geographic market. It includes pricing for labor, materials, applicable permits and fees, sales tax, and contractor's overhead and profit; it does not include costs for major excavation or land value. This estimate is intended to function as one of several sources of information in estimating a replacement cost and is not guaranteed to represent actual replacement costs in the event of damage or loss. The estimated replacement cost is based on information you have provided. It is ultimately the insured's responsibility to obtain adequate insurance.

(Replacement cost includes all applicable permits, fees, overhead, profit, and sales tax)


Step 5:
Click "Finish".

360Value - Google Chrome


Secure | <https://www.360-value.com/apps/iv/Menu.xval>

360Value Main | New Valuation | Search | Import SOV | User Info | Help


Welcome Pacific Specialty Web Services



CREATE VALUATION
Start A New Valuation



SEARCH VALUATIONS
Search For An Existing Valuation



REVIEW TRAINING
Review 360Value Training

[IMPORT COMMERCIAL SCHEDULE OF VALUES](#)
Import Commercial Schedule of Values

Step 6:
Make sure you exit out of the 360Value screen.

Valuation - RCE360

Replacement Cost Status
Calculation Pending

Estimated Replacement Cost

Total Replacement Cost Limit

Property Attributes

Step 7:
Upon returning to our quoting platform, Click “Apply”

All applicable fields will be updated. Replacement Cost Status will change from “Calculating Pending” to “Estimate Applied”.

Upon click of 'Edit RCE 360' you will be routed to an external website. Once you have completed modifications, please exit (close out) from the tab and hit 'Apply Changes' button to apply the new replacement cost.

Property: How to add scheduled Personal Property

Scheduled Personal Property can be added to applicable programs from the Policy Summary page.

Personal Property

Scheduled Personal Property Not Included

Step 1:
Select “edit”

Scheduled Personal Property

| Type | Amount |
|---|--------|
| No scheduled personal property entered for this work item | |

Step 2:
Select “Add New”

Scheduled Property

* Property Type

* Amount Paid

Description

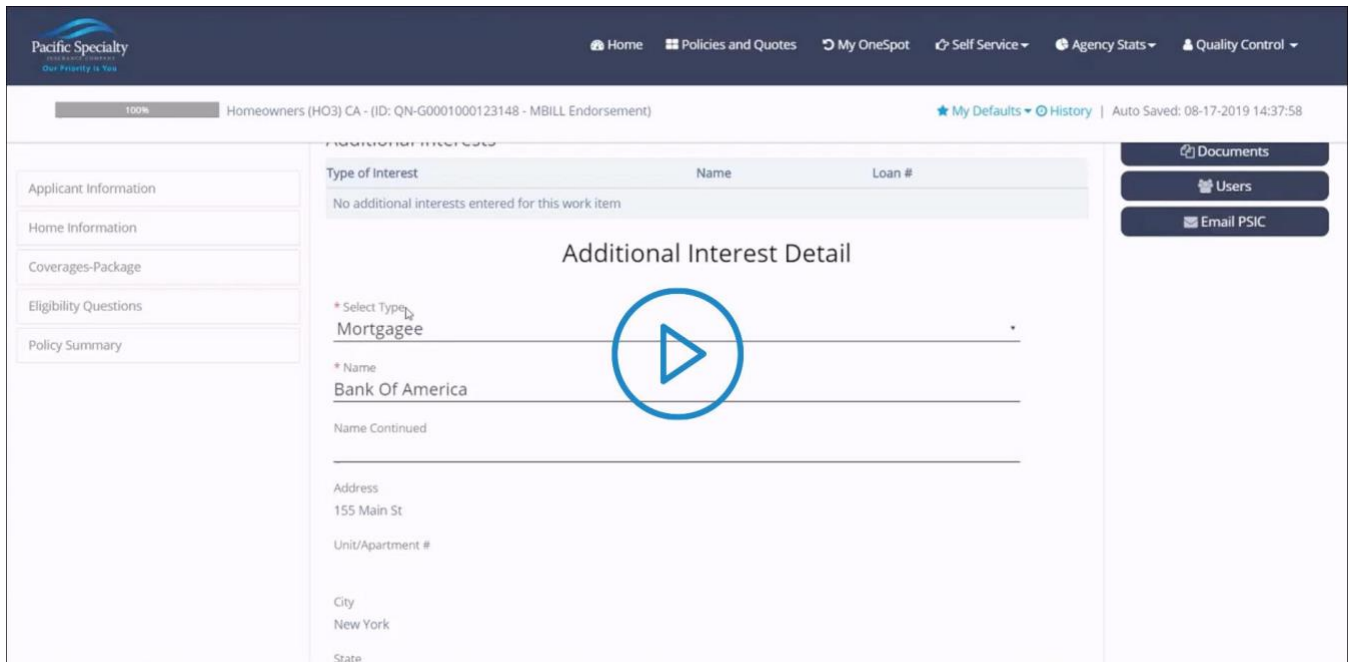
Step 3:

- Select the “Property Type”, Enter the Amount Paid for the item, and type a complete description.
- Select “Add”

Please refer to the guidelines for value restrictions, and rules regarding the submission of appraisals.

Property: How to submit for bind via Mortgage/Escrow Bill

For information on submission for bind via mortgage/escrow bill for homeowners, please refer to the [video linked below](#). The video will provide a high-level overview of the process.



100% Homeowners (HO3) CA - (ID: QN-G0001000123148 - MBILL Endorsement) My Defaults History | Auto Saved: 08-17-2019 14:37:58

Applicant Information
Home Information
Coverages-Package
Eligibility Questions
Policy Summary

| Type of Interest | Name | Loan # |
|--|------|--------|
| No additional interests entered for this work item | | |

Additional Interest Detail

* Select Type
Mortgagee

* Name
Bank Of America

Name Continued

Address
155 Main St

Unit/Apartment #

City
New York

State

Documents
Users
Email PSIC

What is the Pre-Bind referral process?

This is the same as a "Submit for Approval" in our guidelines. Certain information or documentation must be provided prior to submission for bind.

The information and/or answer you have provided causes with additional information. To review our guidelines click

Summary

If you have completed the application, click 'Exit'. Your submit

Step 1:
If the risk needs to be further reviewed by underwriting, producers will only have the option to "Submit to Underwriting" on the Summary screen.

IN-PROGRESS Quote Number: QN-G0TXB000012627 [Submit to Underwriting](#)

The information and/or answer you have provided causes this risk to require further review prior to binding. An Underwriter will contact you with additional information. To review our guidelines click on the Program Guidelines below.

Summary

If you have completed the application, click 'Exit'. Your submission will be saved in your Work in Progress.

REFERRED Quote Number: QN-GOTXB000012627

Step 2:

Upon click of "submit to underwriting", status will change from "In-Progress" to "Referred". Producers will not be able to edit any fields within the quote during.

Step 3:

If documentation is needed, you can either upload documents directly on the platform, or send an email by using the respective options in the right navigation menu.

Comments

Documents

Users

Email PSIC

Upload a File

Add File

Drag file here



* Document Type

Upload

Cancel

Step 4:

If utilizing the document feature, either select "Add File", or drag and drop the file. Select the document type then click "upload."

IN-PROGRESS Quote Number: QN-GOTXB00001

APPROVED Quote Number: QN-GOTXB000012

DECLINED Quote Number: QN-GOTXB000012

Step 5:

Once it has been reviewed by underwriting, the status of the quote will change to either 'Approved, Declined, or In-Progress.

- In-Progress status quotes: the producer will have the option to re-enter any information that was entered incorrectly at the beginning of quote.
- Approved status quotes: the producer will now be able submit the quote for binding consideration.
- Declined quotes: the producer will not be able to submit for bind.

How to Look up a Quote/Policy on the new platform

Here are four options to search for your policy/quote on the new platform. From the home page

- a. Recent policies and Quotes
 - b. Policies that require action
 - c. Status Boxes
2. Policies and Quotes in the top navigation bar
 - a. Advanced search capabilities



Option 1: Home Page
Recent policies and quotes

Recent Quotes and Policies

| Reference ID | Name | Status | Sub Status | LOB | Effective | Duration (Days) |
|-------------------|-----------|---------|-----------------------|---------------|------------|-----------------|
| QN-G0001000110881 | test test | Quote | New-Pending | Homeowners CA | 11-15-2019 | 0 |
| WN-Y000402 | | InForce | Information-Committed | Homeowners CA | 11-14-2019 | 1 |
| WN-Y000402 | | InForce | Information-Committed | Homeowners CA | 11-14-2019 | 1 |
| EN-F000402 | | InForce | Endorse-Committed | Homeowners CA | 11-14-2019 | 1 |
| QN-T000T00 | | Quote | New-Pending | Motorcycle | 11-15-2019 | 1 |

This will show the last 5 policies/quotes accessed by your producer code

Option 2: Home Page
Policies that Require Action

Policies that Require Action

| Policy Number | Status | Sub Status | Name | Premium | Expiration Date | Date of Action | Description |
|----------------------|----------------|-------------------------|------|---------|-----------------|----------------|--|
| EN-D000D049009710-00 | Cancelled | Cancel-Committed | | 50.86 | 10-15-2020 | 11-12-2019 | Our records indicate that you have obtained a policy for insurance. Our underwriting department has not received the signed app. |
| EN-ZICAT049010274-00 | InForce | Information-Committed | | 572.20 | 11-05-2020 | | |
| EN-C000C049010026-00 | Cancel-Pending | CancelPending-Committed | | 790.59 | 10-28-2020 | | We were notified that policy effective the d |
| EN-C000C049010068-00 | Cancel-Pending | CancelPending-Committed | | 659.39 | 10-29-2020 | | |
| EN-D000D049010158-00 | Cancel-Pending | CancelPending-Committed | | 349.00 | 11-04-2020 | | |

This section lists the latest policies in which an action needs to be taken. This will contain, but is not limited to, approved quotes, policies that are pending cancellation, and pending renewal.

Option 3: Home Page

Status Boxes (bottom of the page)



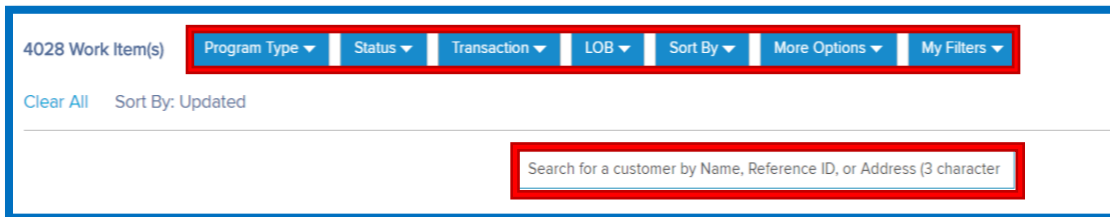
| Reference ID | Program Type | Status | Sub Status | Name | Updated | Address | Premium | Transaction Type | Effective |
|-------------------|-------------------------|--------|--------------|------------------|---------------------|--------------------|---------|------------------|------------|
| QN-ROUMT000100992 | Personal Umbrella (PUP) | | | Melvin | | | 10 | Full Application | 11-14-2019 |
| QN-ROUMT000100516 | Personal Umbrella (PUP) | Quote | New-Approved | Ariel Br | | | 10 | Full Application | 11-07-2019 |
| QN-JOCCA000100517 | Manufactured Home (MH) | Quote | New-Pending | MHQLH | | | 36 | Full Application | 11-07-2019 |
| QN-ROUMT000100194 | Personal Umbrella (PUP) | Quote | New-Approved | PUP 6th | | | 40 | Full Application | 11-05-2019 |
| QN-C000C000099926 | Pleasure Boat (PB) | Quote | New-Approved | Brie All | | | 43 | Full Application | 10-30-2019 |
| QN-C000C000099803 | Pleasure Boat (PB) | Quote | New-Approved | Consuelo Morales | 10-29-2019 09:34:59 | 5421 Meseda Circle | 13000 | Full Application | 11-21-2019 |

Upon selection of one of the boxes, you will be routed to the policies and quotes tab with a query of all policies with the respective status.



Option 4: Policies and Quotes

Advanced search options



1. Use the dropdown boxes to filter for types of work items, work item statuses, or transaction types
2. Use the search box to find specific policies using any of the following:
 - Insured's Name
 - Policy/Quote Number
 - Insured's Address

Select the policy you are looking for and use the available commands to access the policy.

Home Policies and Quotes My OneSpot Self Service Agency Stats Daniel Har

Ariel Brenson

| Reference ID | Program Type | Status | Sub Status | Name | Updated | Address | Transaction Type | Effective |
|----------------------|--------------|---------|------------------|---------------|---------------------|--------------------------|--|------------|
| QN-T000T000095335 | Street (MS) | | | Ariel Brenson | 05-03-2019 15:41:36 | 123 Pacific Specialty St | Full Application | 05-14-2019 |
| EN-T000T020001757-00 | Street (MS) | InForce | Endorse-Declined | Ariel Brenson | 05-03-2019 08:26:57 | 13412 Bunker Hill Pl | Endorsement | 04-24-2019 |
| QN-T000T000095237 | Street (MS) | | | ARIEL BRENSON | 05-02-2019 16:57:41 | | Open Transaction Summary Other Actions | |
| QN-T000T000095241 | Street (MS) | | | ariel brenson | 05-02-2019 16:53:45 | 125 Ash St | Full Application | 05-05-2019 |
| QN-T000T000095348 | Street (MS) | | | Ariel Brenson | 05-02-2019 16:53:45 | 5515 E La Palma | Full Application | 05-04-2019 |

Open- Opens policy at the Summary page, and quotes at last attained page

Transaction Summary – Opens a separate window with a summary of transactions processed

Other Actions – Allows Producer to Inquire, Endorse or Cancel.

*Please note that there may be restrictions on endorsements and cancellations based on the policy status and other factors. More details will be included in upcoming sections.

AssureSign – The new E-signature

The electronic signature process has been updated on our new platform. We have built an integration with vendor AssureSign for the signing of new business applications. Prior to bind, the default will be set for automatic opt-in to our electronic signature process. An email address from both the insured and producer will be required if you utilize the e-signature process. After submission for bind, an email will be sent to the insured's email. They will follow the link in the email to proceed with signing. Once signed by the insured, our system will be automatically updated and both the insured and producer will receive a confirmation email with the signed application. The producer will fill out any and all pertinent acknowledgements prior to submitting for binding.

Agreement to Complete Application for Insurance Electronically

I have reviewed all information represented in this application and wa...
correct and in complete compliance with all underwriting requirements...
is subject to acceptance of the risk by PSIC provided all underwriting rule...
The applicant's failure to provide Pacific Specialty Insurance Company w...
will result in cancellation of the policy. A signed application assures Pac...
the applicant has attested to the accuracy of the answers and inform...
consents to entering into an insurance contract.

If "yes" is selected here, you are agreeing to sign via electronic signature. An email address for both the insured and the producer will be required. The application must be signed within 3 business days or the policy may be subject to cancellation

I agree to complete, and sign the application electronically using PSIC's preferred vendor.

 Y

* Insured E-mail Address

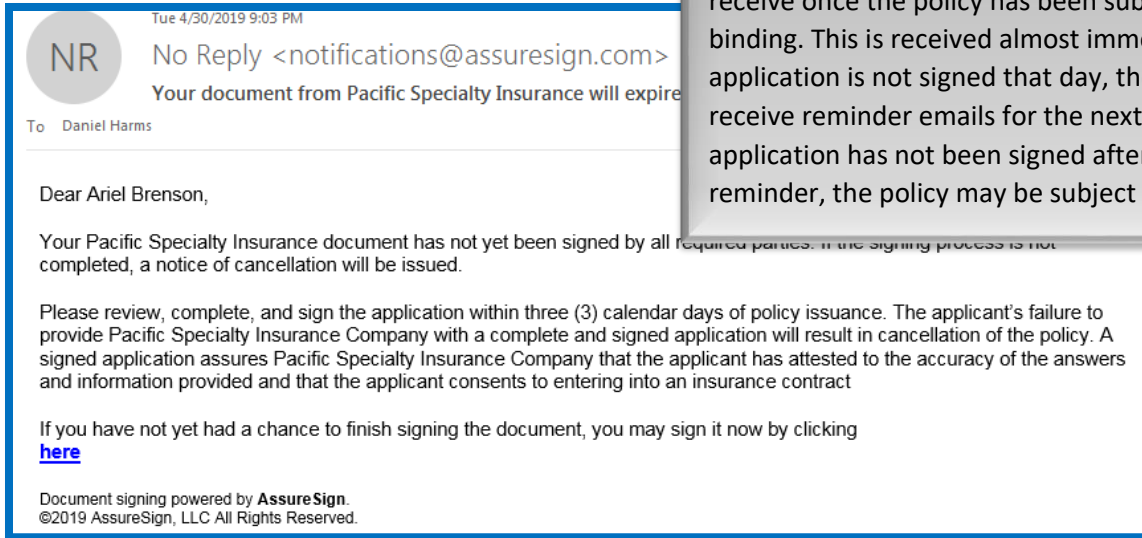
* Producer E-mail Address

* I have reviewed all information with my client including unacceptable risks and binding procedures and agree that checking this box will serve as my electronic signature on the application.

 N

You, as the producer, are acknowledging you have reviewed all information with the client in this section. By selecting "yes", you will be able to proceed from the page and this selection will serve as the acknowledgement of electronic signature on the application.

This is a sample of the initial email the insured will receive once the policy has been submitted for binding. This is received almost immediately. If the application is not signed that day, the insured will receive reminder emails for the next 3 days. If the application has not been signed after the third reminder, the policy may be subject to cancellation.



What if my insured does not have an email address?

Producers do have the option to opt-out of the electronic signature process, if the insured does not have an email.

Agreement to Complete Application for Insurance Electronically

I have reviewed all information represented in this application and warrant that the application is true and correct and in complete compliance with all underwriting requirements including binding procedures. Binding is subject to acceptance of the risk by PSIC provided all underwriting rules are followed.

The applicant's failure to provide Pacific Specialty Insurance Company with a complete and signed application will result in cancellation of the policy. A signed application assures Pacific Specialty Insurance Company that the applicant has attested to the accuracy of the answers and information provided and that the applicant consents to entering into an insurance contract.

I agree to complete, and sign the application electronically using PSIC's preferred vendor.



By answering "no" to the above question, you agree to manually remit the signed application to PSIC via mail or email within 3 calendar days of issuance. If not submitted your policy may be subject to cancellation.

Continue

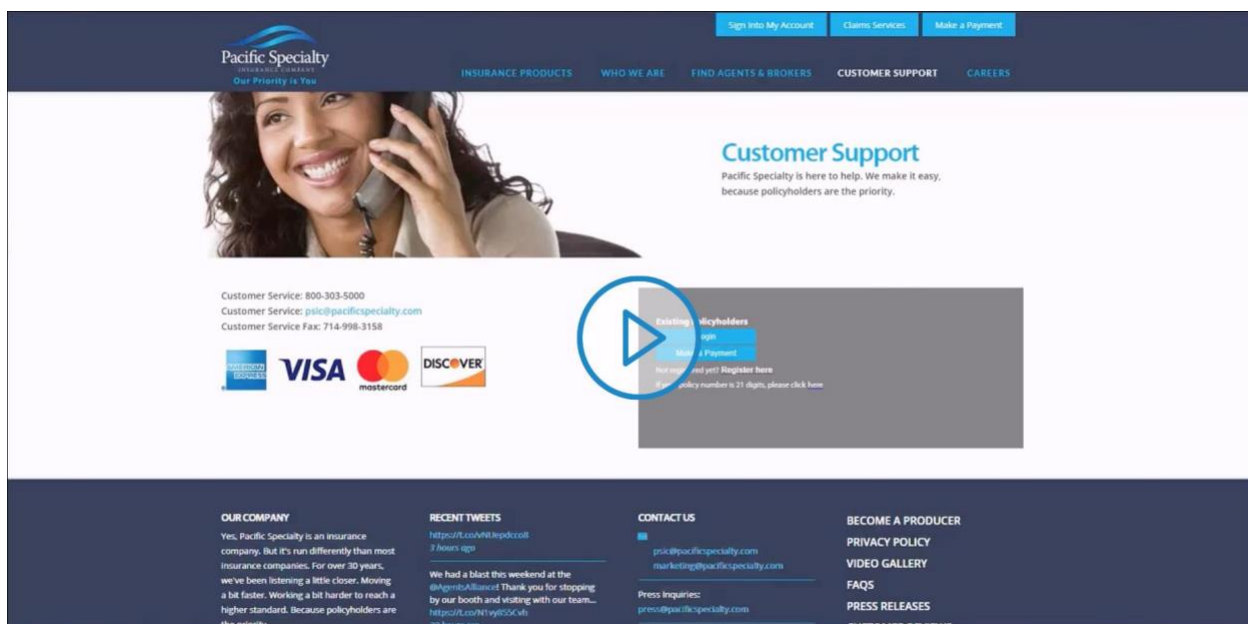
More Actions... ▾

What are the Self-Service options for producers?

Producers will have more authority to process transactions on behalf on the named insured on the new system. This will include inquiry mode, enhanced endorsement options, and the ability to cancel policies on the insured’s behalf. These can be accessed under the “Other Actions” dropdown from the Policies and Quotes page. The following sections will go over some of the features of these self-service options.

| | | | | | | | | |
|----------------------|------------------|---------|---------------|----------------------------------|------------------------|--------------------|---------------------|------------------------------|
| EN-G0001020008253-00 | Homeowners (HO3) | InForce | New-Committed | test test | 11-22-2019 13:46:41 | 24029 Bearskin Cir | Full Application | 11-29-2019 |
| WN-F0004020008252-00 | Renters (HO4) | InForce | New-Committed | sanity11222019 sanity11222019 | 11-22-2019 13:19:50 | 5560 Windem | Transaction Summary | Other Actions▼ |
| WN-F0004020008251-00 | Renters (HO4) | InForce | New-Committed | Test for HO4 Test for HO4 | 11-22-2019 13:19:41 | 24 Bear Paw 54D | Full Application | Endorse Cancel Inquiry |

The [video linked below](#) discusses self-service capabilities including self-payment options, searching for policies, and endorsing, cancelling or inquiring about policies.



How do I inquire a policy and view documents?

| | | | | | | | | |
|----------------------|------------------|---------|---------------|----------------------------------|------------------------|--------------------|---------------------|------------------------------|
| EN-G0001020008253-00 | Homeowners (HO3) | InForce | New-Committed | test test | 11-22-2019 13:46:41 | 24029 Bearskin Cir | Full Application | 11-29-2019 |
| WN-F0004020008252-00 | Renters (HO4) | InForce | New-Committed | sanity11222019 sanity11222019 | 11-22-2019 13:19:50 | 5560 Windem | Transaction Summary | Other Actions▼ |
| WN-F0004020008251-00 | Renters (HO4) | InForce | New-Committed | Test for HO4 Test for HO4 | 11-22-2019 13:19:41 | 24 Bear Paw 54D | Full Application | Endorse Cancel Inquiry |

From the Policies and Quotes page, select the policy, click on “Other Actions”, then select “Inquiry”. Confirm the policy number, then continue. Please note all fields will be read only.

Policy Number

EN-G0001020008253-00

Continue Back

Continue Get Documents

From the Applicant information page, you will be able to either continue from page to page by selecting "Continue" or, select "Get Documents" from the bottom of the page to be routed to the summary page. This will route you directly to the Summary page where all pertinent documents will be available.

Policy Documents ?

360Value Evidence of Insurance (EOI) Application-112219-Insured Declaration-112219-Insured

How do I process an Endorsement?

| | | | | | | | | |
|----------------------|------------------|---------|---------------|-----------|------------|-------------------|--------------------------|---------------|
| EN-G0001020008253-00 | Homeowners (HO3) | InForce | New-Committed | test test | 11-22-2019 | 24029 Bearskin Cr | Full Application | 11-29-2019 |
| WN-F0004020008252-00 | Renters (HO4) | | | | | | Transaction Summary | Other Actions |
| WN-F0004020008251-00 | Renters (HO4) | | | | | | Full Application Inquiry | Endorse |

From the Policies and Quotes page, select the policy, click on "Other Actions", then select "Endorse".

Policy Number

EN-T000T020008254-00

Effective Date: *

11/22/2019

Continue Back

Confirm the policy number, input the endorsement effective date then press "Continue". Please note that some products may have other endorsement options here. Proceed through all pages making applicable changes until you reach the summary

Summary

QUOTED

Policy Number: EN-T000T02000

PRO RATED ENDORSEMENT PREMIUM

\$56.09

(PRO RATED ENDORSEMENT PREMIUM INCLUDES FULLY EARNED FEES WHEN APPLICABLE)

Applicant:

Garaging Address:

Policy Term:

Policy Type:

Motorcycle - Street

Once you have reached the summary page you will see the pro-rated endorsement premium. If the premium does not change or goes down, you will be able to directly submit the endorsement by selecting "Submit". Screens may vary depending on the product.

Endorsement Status In-Progress

Payment

- Minimum Endorsement Payment \$11.22
- Full Endorsement Payment \$56.09
- Outstanding Policy Balance \$336.58
- Other Amount

* Payment Method One Time Credit

Payment Amount

Submit


More Actions...

If the premium updates, a payment may be required in order to proceed. At this point you can pay the minimum premium due, the full endorsement premium, or the outstanding balance on the policy, if applicable. Please be sure to hit submit on this page in order to finalize the endorsement.

Casualty: Endorsement: How to Change the Mailing Address and other contact information

To begin the endorsement, review the section "How do I process an endorsement". Once you have landed on the applicant information page, you will see some of the fields are now editable. After all applicable fields have been edited, proceed to the summary page and submit the endorsement.

- Mailing address
 - From the Applicant information page, under Name and Address select "Edit Address"
 - i.
 - The fields will now be editable
 - Validate address
 - Continue
- Garaging Address
 - From the Applicant information page, under Name and Address select "No" for the question "Is Garaging Address the same as Mailing Address?"



* Is Garaging Address the same as Mailing Address? Yes No

* Garaging Address

Unit/Apt #

* City

State California

* Zip Code

Validate Address

- i.
- The fields will now be editable
 - Validate address
 - Continue
 - Phone number and email address
 - Fields are editable
 - Simply type over the existing information with the updated information

Casualty: Endorsement – How to change coverage

To begin the endorsement, review the section “How do I process an endorsement”. Once you have landed on the applicant information page, hit “Continue” on each page until you reach the coverage page. After all applicable fields have been edited, proceed to the summary page to submit the endorsement. Some endorsements may need to be reviewed by an underwriter prior to submission.

- Coverages
 - Most coverages can be updated on this page. Some coverages are not available unless you select other coverages first.
 - Most limits can be increased or decreased without a signed request. Some changes may have to be reviewed by an underwriter prior to submission
 - To add trailer coverage, you must first purchase comprehensive/collision coverages, and the trailer must first be added on the vehicle page under one of the vehicles listed. Proceed to coverage to see the coverage has been added.

Casualty: Endorsement: How to add a Vehicle/Vessel or a Driver midterm

To begin the endorsement, review the section “How do I process an endorsement”. Once you have landed on the applicant information page, hit “Continue” on each page until you reach the coverage page. After all applicable fields have been edited, proceed to the summary page and submit the endorsement.

- Addition/Edit of Driver

- From the Drivers page, select “Add New” to add an additional driver or “Edit” to modify an existing one.

| Driver(s) | | |
|---|---------------|----------------------|
| Driver Name | Date of Birth | License # |
| | | |
| | | Edit |
| Continue Add New More Actions... | | |

i.

- Input all mandatory fields
 - Select “Add” or “Save”
 - Continue
 - Please note the driving history will be ran prior to submission. This may need underwriting review prior to submission.
- Addition of Vehicle/Vessel
 - From the Vehicles or Vessels page, select “Add New” to add an additional vehicle/vessel or “Edit” to modify an existing one.

| Vehicle(s) | | | |
|---|---------|-------|---|
| Year | Make | Model | VIN |
| 2013 | VICTORY | JUDGE | |
| | | | Edit Delete |
| Continue Add New More Actions... | | | |

i.

- Input all mandatory fields
- Select “Add” or “save”
- Continue to coverages pages
- Select vehicle level coverages

Property: Endorsement – How to update the mortgage/escrow information

To begin the endorsement, review the section “How do I process an endorsement”. For this type of endorsement, select reason “Other” to proceed. After all applicable fields have been edited, proceed to the summary page and submit the endorsement.

- Mortgage/escrow information
 - Proceed to the Summary page (continue on each page)
 - Next to Additional interests/Mortgage select “Optional” to enter the section

| Additional Interests/Mortgage Optional | |
|--|-------------|
| Type of Interest | Name |
| Escrow | test escrow |
| Mortgagee | test |

i.

- Certain fields will now be editable. From this page you may be able to edit, delete, or add new. Select continue once finished

| Additional Interests/Mortgage | | |
|-------------------------------|-------------|---|
| Type of Interest | Name | Loan # |
| Escrow | test escrow | <input type="button" value="View"/> |
| Mortgagee | test | <input type="button" value="Edit"/> <input type="button" value="Delete"/> |

More Actions... ▾

- Select continue once finished.

Property: Endorsement - How to change the mailing address and other contact information

To begin the endorsement, review the section “How do I process an endorsement”. For this type of endorsement, select reason “Other” to proceed. After all applicable fields have been edited, proceed to the summary page and submit the endorsement.

- Mailing address/contact information
 - Proceed to the Summary page (continue on each page)
 - Next to Applicant details select “Complete” to enter the section

| * Applicant Details <input type="button" value="Complete"/> | |
|---|----------------|
| Applicant: | test test |
| Phone Number: | (800) 303-5000 |
| Insured DOB: | 01/01/1980 |
| E-mail : | |

- Certain fields will now be editable (vesting, cell phone number, additional phone number, email address, and mailing address)
 - To change the mailing address, select “N” for the question “Is mailing address same as property address?”

| | |
|--|---------------------------------|
| * Is mailing address the same as property address? | <input type="radio" value="N"/> |
| * Mailing Address | |
| Enter a location | <input type="text"/> |
| Unit/Apartment # | <input type="text"/> |
| * Please advise why mailing address is different | <input type="text"/> |

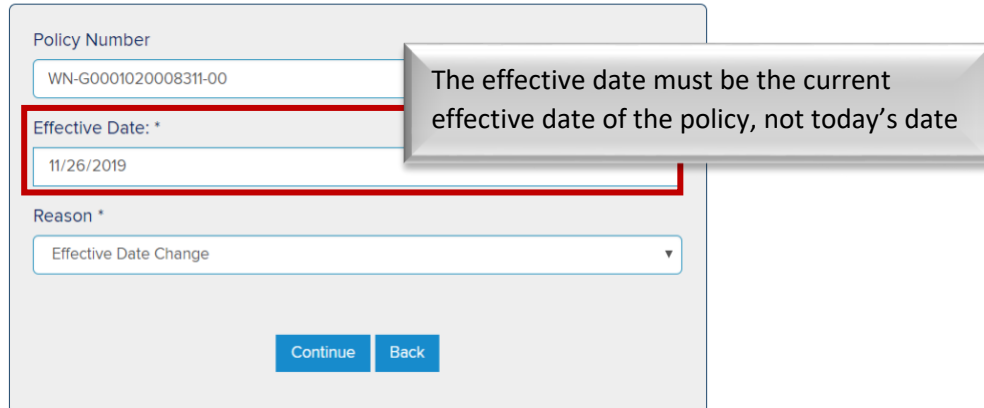
- Validate address
 - Fill out other pertinent fields

- Continue

Property Endorsement – How to change the effective date

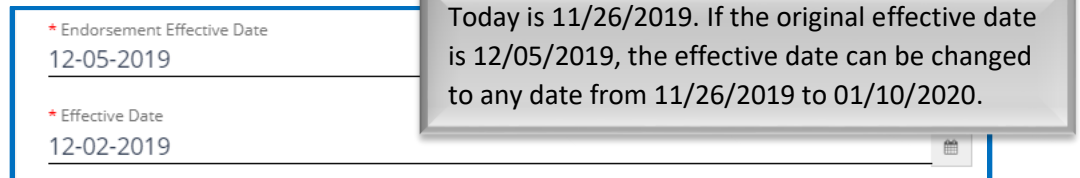
To begin the endorsement, review the section “How do I process an endorsement”. For this type of endorsement, select reason “Effective Date Change” to proceed. This type of endorsement is only available for escrow/mortgage bill policies where the current effective date is in the future.

- Ensure the effective date on the first endorsement page is the current effective date.



The screenshot shows a web form for an endorsement. The 'Policy Number' field contains 'WN-G0001020008311-00'. The 'Effective Date' field is highlighted with a red border and contains '11/26/2019'. The 'Reason' dropdown menu is set to 'Effective Date Change'. A callout box points to the 'Effective Date' field with the text: 'The effective date must be the current effective date of the policy, not today's date'. At the bottom of the form are 'Continue' and 'Back' buttons.

- Coverages page
 - Proceed to the coverage page by selecting “Continue” on each page.
 - Endorsement effective date will be the current policy effective date
 - Change the Effective Date to a date no less than the current date, but no more than 45 in the future.



The screenshot shows a table with two rows. The first row is 'Endorsement Effective Date' with the value '12-05-2019'. The second row is 'Effective Date' with the value '12-02-2019'. A callout box points to the 'Effective Date' row with the text: 'Today is 11/26/2019. If the original effective date is 12/05/2019, the effective date can be changed to any date from 11/26/2019 to 01/10/2020.' There is a small calendar icon to the right of the date field.

- i.
- ii. EX: Today is 11/26/2019. If the original effective date is 12/05/2019, the effective date can be changed to any date from 11/26/2019 to 01/10/2020
- iii. The endorsement effective date will be the original policy effective date, and the effective date will be the new effective date.

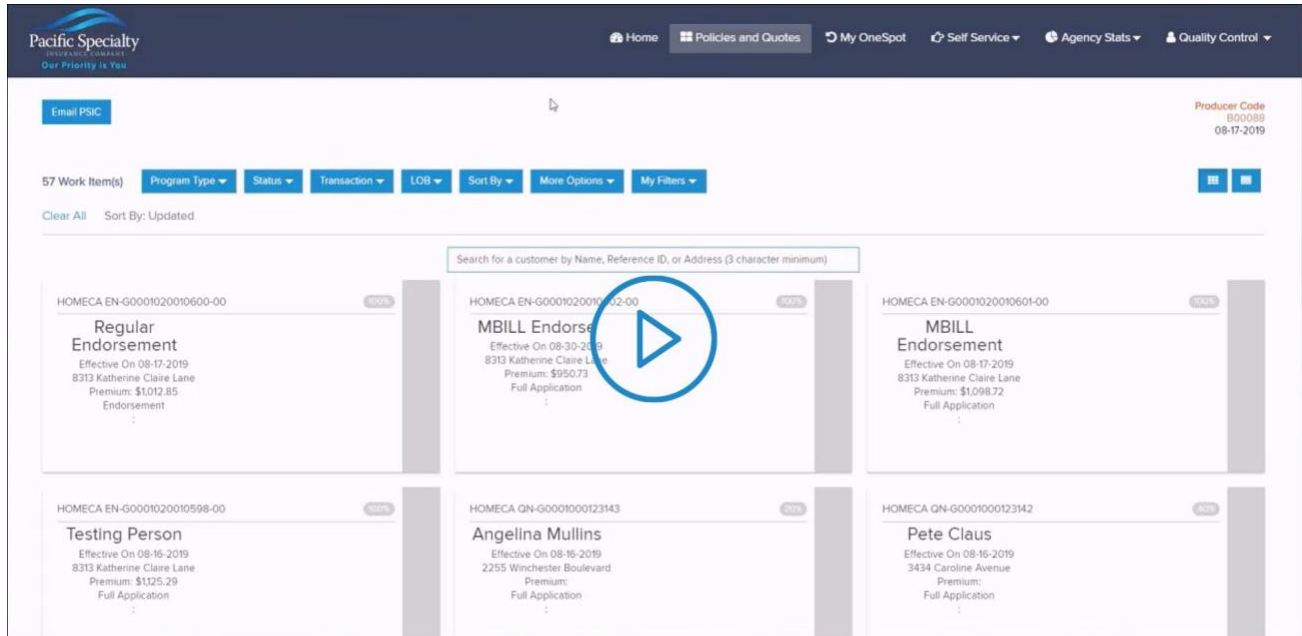
- Proceed to the summary page and submit the endorsement.

Property: Endorsement - How to change coverage

To begin the endorsement, review the section “How do I process an endorsement”. For this type of endorsement, select reason “Other” to proceed. After all applicable fields have been edited, proceed to the summary page and submit the endorsement.

- Coverages page
 - Most coverages can be updated on this page. Some coverages are not available unless you select other coverages first.

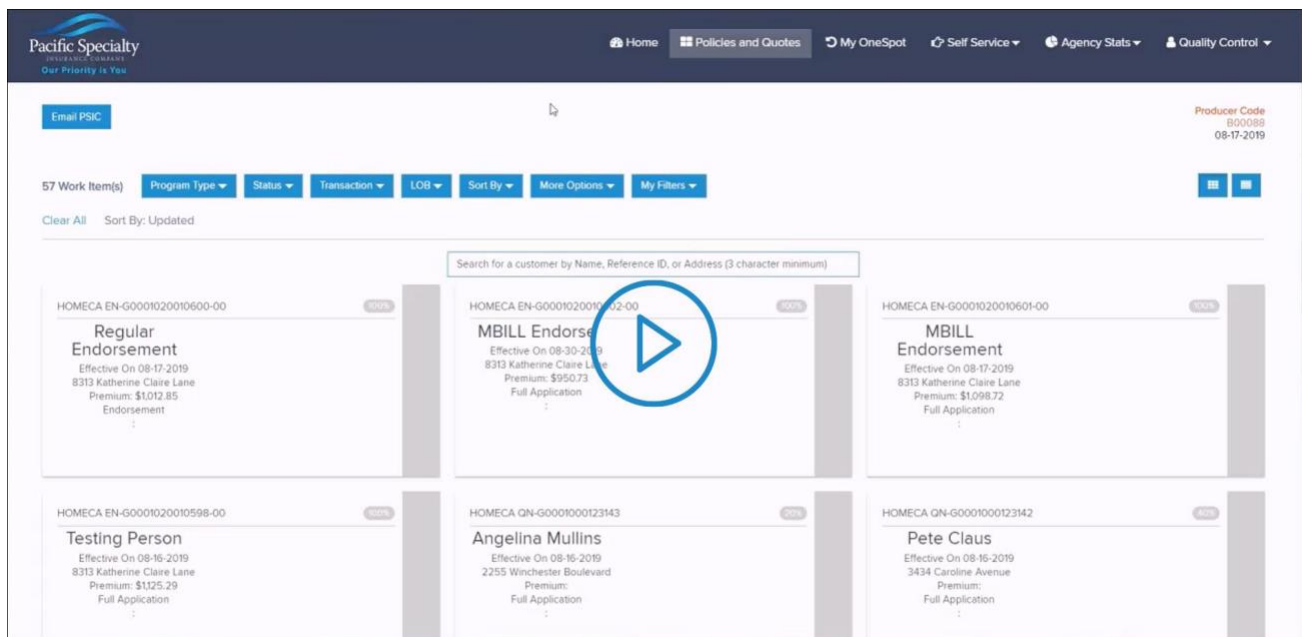
- Most limits can be increased or decreased without a signed request. Some changes may have to be reviewed by an underwriter prior to submission.
- Once all requested adjustments have been made, proceed to the summary page and submit the endorsement.



The screenshot shows the Pacific Specialty Insurance Company web portal. At the top, there is a navigation bar with links for Home, Policies and Quotes, My OneSpot, Self Service, Agency Stats, and Quality Control. Below the navigation bar, there is a search bar and a list of 57 work items. The work items are displayed in a grid format. The first row contains three items: 'Regular Endorsement', 'MBILL Endorsement', and 'MBILL Endorsement'. The second row contains three items: 'Testing Person', 'Angelina Mullins', and 'Pete Claus'. A play button icon is overlaid on the 'MBILL Endorsement' card in the first row.

Property Endorsements

Check out the [video linked below](#) which covers adjusting effective dates, endorsement types, and coverage options.



This screenshot is identical to the one above, showing the Pacific Specialty Insurance Company web portal with a list of work items. A play button icon is overlaid on the 'MBILL Endorsement' card in the first row.

How to Cancel a Policy per the Insured's Request

| | | | | | | | | |
|----------------------|------------------|---------|---------------|-----------|------------|--------------------|--------------------------|----------------|
| EN-G0001020008253-00 | Homeowners (HO3) | InForce | New-Committed | test test | 11-22-2019 | 24029 Bearskin Cir | Full Application | 11-29-2019 |
| WN-F0004020008252-00 | Renters (HO4) | | | | | | Transaction Summary | Other Actions▼ |
| WN-F0004020008251-00 | Renters (HO4) | | | | | | Endorse | Cancel |
| | | | | | | | Full Application Inquiry | |

From the Policies and Quotes page, select the policy, click on "Other Actions", then select "Cancel".

Cancellation Page

* Cancellation Date
11-26-2019

* Reason for Cancellation

Method of Cancellation
Pro-Rata

Refund Instructions / Comments

Other Actions... ▼

Input all necessary fields. Please note some cancellations may have to be reviewed by an underwriter, and some are not allowed to be processed online. These will have to go through normal correspondence channels. Once all mandatory fields have been completed, select continue.

Cancellation

Cancellation Details

Cancellation Date

Reason for Cancellation

Method For Cancellation Flat

Special Instructions:

I have reviewed all information provided in this cancellation request and acknowledge that submission of this request will result in cancellation of the policy and that no coverage will be afforded from the Cancellation Effective Date.

Confirm all fields are correct, then review and check the acknowledgement in order to proceed with the cancellation process. Select "Submit to Cancel."

How to access Producer reports



Select Agency Stats from the top Navigation bar. Click on the appropriate report. Report will open in an excel format for the producer to sort and filter as necessary.

Frequently Asked Questions (FAQs)

What programs are being released onto the new platform?

California Street, Off-road, HO-3, HO-4, HO-6, DP-1, and DP-3. Renewal business will remain on the legacy system for the time being.

What are the major differences I can expect to see?

We are launching a completely new quoting platform. There will be new pre-bind integrations, updated forms, a new payment system, and more self-service capabilities for the producer. Other states and products to follow!

How do I access the new platform?

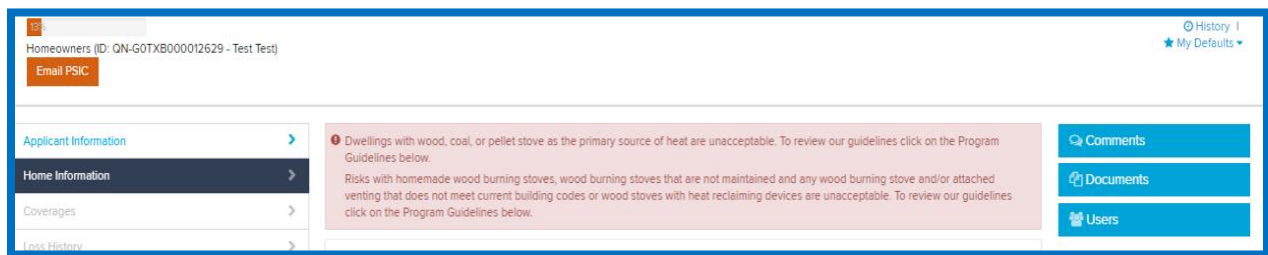
There are no major differences from your side. Upon selection of the applicable programs, you will be routed to the new platform.

Will I be able to bridge in from any comparative raters?

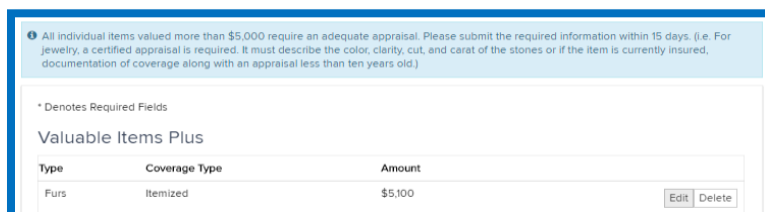
The bridging of the comparative raters to our new portal is going to be rolled out over the next few weeks. PLRTR and EZLynx will be released in mid-November with others to follow shortly after. If you are experiencing issues bridging, please first confirm your username and password credentials are the same as the ones on our system.

I received an error message in red text. What does the red text signify?

This is a hard stop message. If quote generates a notification in red that means risk is unacceptable and producer will not be able to continue with the quote.



I received a message in blue text. What does the blue text signify?



* Denotes Required Fields

Valuable Items Plus

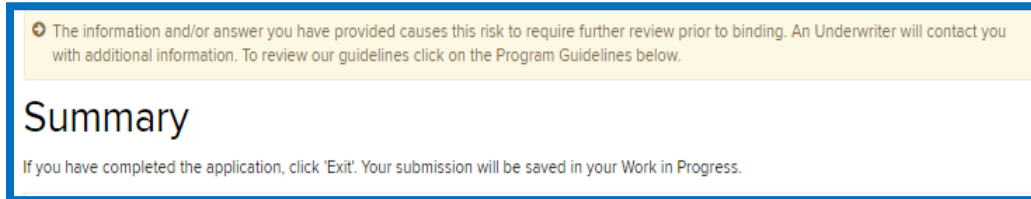
| Type | Coverage Type | Amount |
|------|---------------|---------|
| Furs | Itemized | \$5,100 |

Edit Delete

This is an informational message. If a quote generates a notification in blue that means additional information/documentation might be needed for quote.

I received a message in yellow text. What does the yellow text signify?

This is a warning message. If a quote generates a notification in yellow that means the risk will need to be referred to underwriting to be reviewed, or additional information is needed.



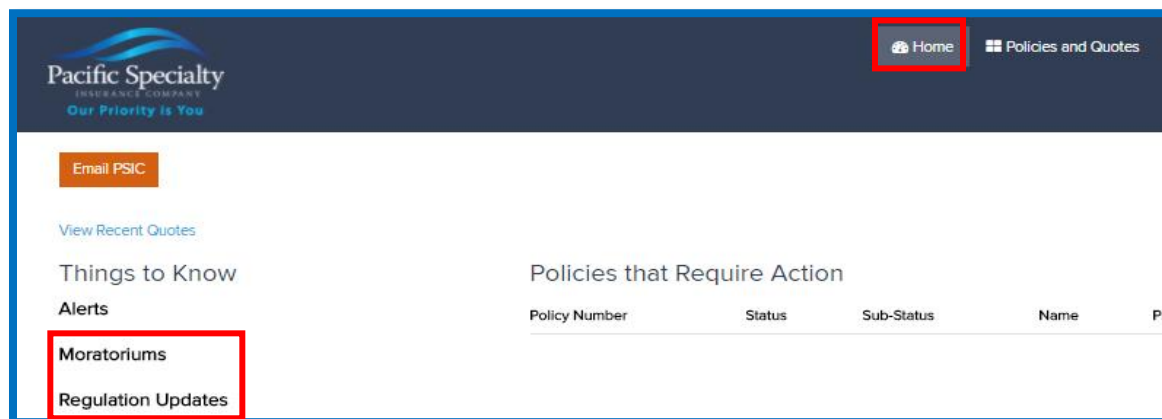
The information and/or answer you have provided causes this risk to require further review prior to binding. An Underwriter will contact you with additional information. To review our guidelines click on the Program Guidelines below.

Summary

If you have completed the application, click 'Exit'. Your submission will be saved in your Work in Progress.

Will we be notified of current moratoriums and regulation changes?

Yes, it will be available under Home dashboard.



The screenshot shows the Pacific Specialty Home dashboard. The top navigation bar includes a 'Home' button (highlighted with a red box) and a 'Policies and Quotes' button. Below the navigation bar, there is a section for 'Alerts' with a 'Moratoriums' button (highlighted with a red box) and a 'Regulation Updates' button. To the right, there is a table titled 'Policies that Require Action' with columns for Policy Number, Status, Sub-Status, Name, and Priority.

Will users be able to upload documents to quotes/policies on the new platform?

Yes. Users will only be able to attach documents to quotes.

Step 1:

Prior to submitting the quote for binding consideration click 'Documents' located on the top right corner.

Summary

If you have completed the application, click 'Exit'. Your submission will be saved in your Work in Progress.

IN-PROGRESS Quote Number: QN-G0TXB000012699 Submit

Comments

Documents

Users


Comments

Documents

Upload a File

Add File

Drag file here



(IO) High Dwelling Limit.pdf

* Document Type

Other

Upload
Cancel

Users

Step 2:

- Click 'Add File'
- Select a 'Document Type'
- Click 'Upload' when done attaching file.
- File will be available under 'Documents'.

***It will take a few minutes for documents to reflect under Bind Summary Screen.

What is the new Application signature process?

The electronic signature process has been updated on our new platform. We have built an integration with vendor AssureSign for the signing of new business applications. Prior to bind, you be automatically opted into our electronic signature process. An email address from the insured and producer will both be required if you utilize the e-signature process. The producer will fill out any and all pertinent acknowledgements prior to submission for binding. After submission, an email for the insured's portion of the signature process will be sent to their respective email. They simply need to click on the appropriate link in the email to be routed to the AssureSign platform. Once signed by the insured, our system will be automatically updated and both the insured and producer will receive a confirmation email with the signed application.

How long do we have to sign the application?

The application must be signed by the applicant and the producer within 3 business days of submission. If both parties have not signed the application within that time frame, the policy may be subject to cancellation.

Will producers be able to process endorsements and cancellations on the new platform?

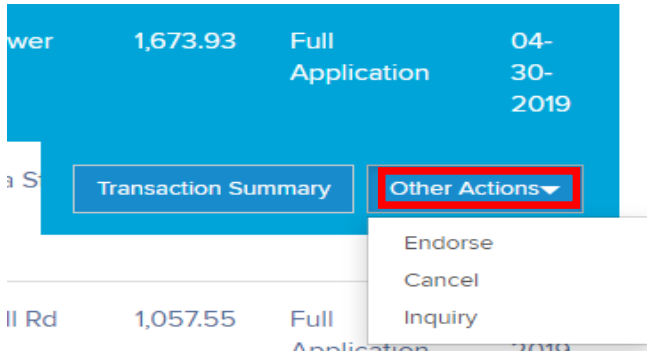
Yes. Producers will be able to process endorsements and cancellations on the new platform. There may however be limitations depending on the scenario.



Home Policies and Quotes My OneSpot

Step 1:

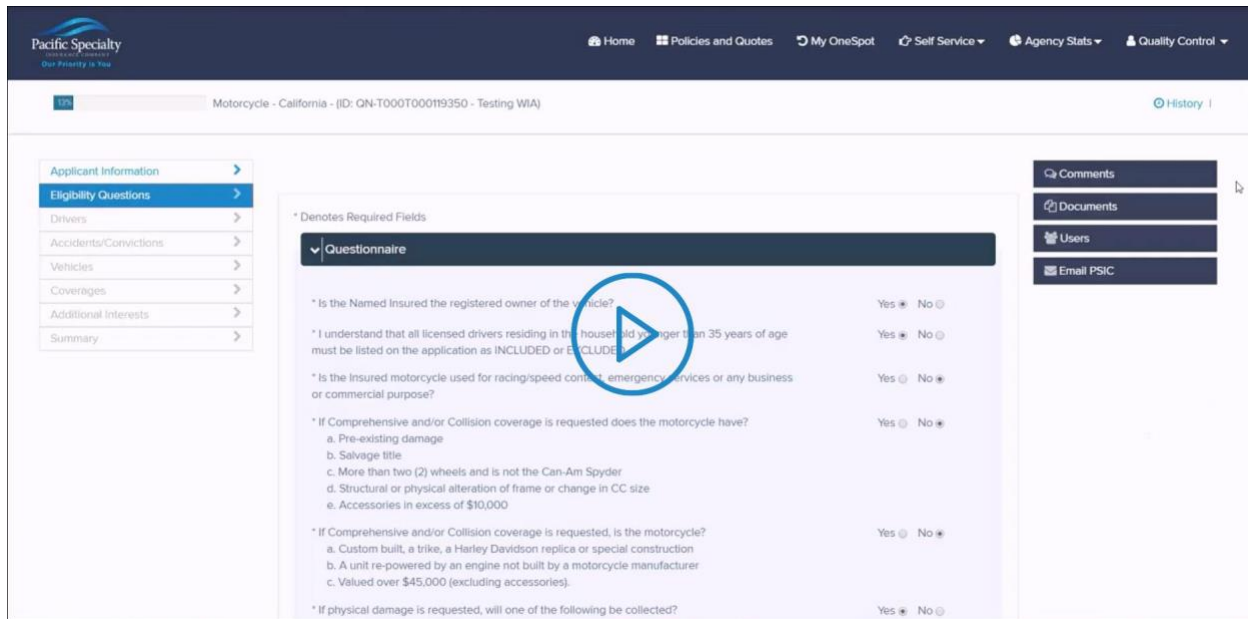
From the Dashboard select 'Policies and Quotes'.



Step 2:
Click on the policy you wish to process, select "Other Actions", then select the appropriate transaction.

Work Item Assistant Review

The [video linked below](#) is an overview on the work item assistant comprised of comments, documents, users, and email PSIC.



Glossary of Terms

Billing Method – If the policy is to be set up on preauthorized payments, choose Credit Card or EFT as the Billing Method. Otherwise, choose Paper Invoice.



The image shows a screenshot of a web form. On the left, there is a text input field labeled "Billing Method*". To its right is a dropdown menu. The dropdown menu is currently open, showing four options: "Paper Invoice" (which is selected and highlighted), "Paper Invoice", "Credit Card", and "EFT".

Paper Invoice – This is the billing method to be selected, when the insured does not want to have funds drafted from their account. Payment will need to be made online, over the phone, or via mail.

Relation to Applicant – Field utilized to describe the relationship between the listed drivers and the applicant.

- **SP:** Spouse
- **C:** Child
- **P/S:** Partner/Significant Other
- **P:** Parent
- **SIB:** Sibling
- **S:** Self

Task – Unit of work that must be done on a policy/claim.

Transaction Types & Uses – On the TransACT page, there are 12 transaction types listed under the Transaction Type drop-down menu. Each type has its own specific use and function. Transaction types are as follows:

| Type | Use Description |
|----------------|--|
| Endorse | Makes changes to a policy |
| Cancel | Cancels the policy. No coverage is in force |
| Renew | Renews the policy |
| Renewal Change | Makes changes to renewal term only (conditional renewal) |
| Information | Requests information from the insured/producer (<i>Notice, Cancel, or Non-Renew</i>), |
| Cancel Pending | Underwriting cancellation with future cancellation date, or future dated insured request cancellation. |
| Non-Renew | Non-renewal was issued per underwriter discretion |
| Reinstate | Reinstated a cancelled policy – no lapse in coverage. |
| Rewrite | Rewrite a policy that has expired or cancelled |

UI – Acronym for User Interface. This refers to the graphic you see on the screen.

Waive – All fees/surcharges should be waived, if determined that we will not be charging.

Write-off – Write-offs are to be used for premium, if the company has decided that we will not bill for funds.