# Quick Reference—

# Updating Agency Information

## COASTAL
### Insurance Underwriters

Coastal's website provides our agents with the ability to self-manage their agency. The tools on the website will allow our agents to amend their contact information, create diligent effort favorites, add electronic signatures, update E&O information, as well as add, remove or change users.  And it is all available 24/7!

| Feature | See page # |
|---|---|
| **Accessing the Agency/User Management Functions** | 2 |
| | |
| **Individual User Self-Management Features** | |
| • Update name, phone, fax, license number, and password | 3 |
| • Set email notification preference | 3 |
| • Set electronic signature | 3 |
| | |
| **Online Agency Appointment Process:** | |
| • Includes ability to (self) manage: | |
|     • Producer agreement | 7 |
|     • E&O docs compliance | 8 |
|     • W-9 forms | 8 |
|     • Copies of agency (entity) license | 4 |
|     • Addresses, phone and fax numbers | 4 |
|     • Owner and Principal information | 5 |
| • Copies of executed producer agreement on file for agency to access at any time.  Includes commission schedule. | 7 & 9 |
| | |
| **Electronic Diligent Effort /SL2 forms & Electronic Signatures** | |
| • Electronic Diligent Effort forms | 6 |
|     • Includes saved favorites | |
|     • Will be completed just prior to request to bind being submitted (instead of uploading a paper form) | |
| • Electronic signatures | 3 |
|     • Includes ability for agent to save his electronic signature, that can be placed on Diligent Effort forms, etc. | |
| | |
| **Self-managed logins for agency personnel** | |
| • Includes ability for agencies to designate accounting personnel for future access to make payments online | 5 |
| • Each individual needs his or her own login, logins should not be shared | |
| | |
| **Email notification assignment** | 3 & 4 |
| • Includes ability for agents to set a default email recipient at either an agency level, or an individual quote level | |
|     • Example, you have a group email address for all website related emails such as status changes, endorsements, etc. | |
|     • Example, specific agent has a CSR assigned to all his accounts who manages his/her policy activity | |

# Quick Reference—
# Updating Agency Information

## Accessing Agency Management

Sign into the website (www.ciuins.com).

All users will see the option for **My Profile**. Simply click to access the individual settings to update password, phone, fax, and license number. This is also where the user can set the email preferences and upload an electronic signature.
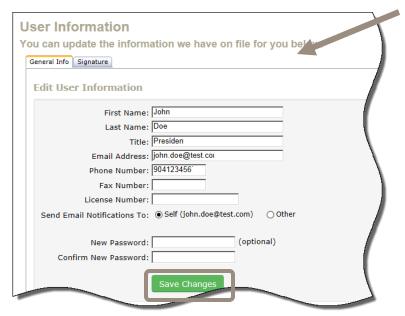




Agency administrators will also have the **My Agency** option which will allow you to manage the agency (e.g. add/remove users, review the producer agreement, upload E&O information, amend addresses and phone numbers, etc.)

If you do not know who is the agency admin, please call us and we will assist you.

# Quick Reference—

# Updating Agency Information

## Updating User Information

Each individual user can update his or her information as needed. From the *General Info* tab, the name, title, email address, phone number, fax number, license number, and password can be updated as needed. The user can also set the email address that he/she wants to receive all of the website generated messages.

**IMPORTANT**: You must click the **Save Changes** button.

## Creating an Electronic Signature

Click the **Signature** tab to access the electronic signature option.

Once there, click **Create New Electronic Signature.**

Using the mouse, sign your name, and then click **Save.**

Once completed, you have the option to redo by clicking **Create New Electronic Signature** and to share your signature with others in the agency by clicking **Share Signature Within My Agency.** This will be useful for agents who have CSRs or others working their policies.
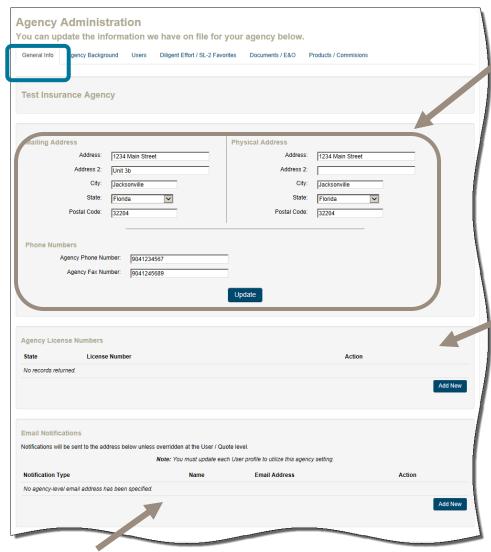
# Quick Reference—

## Updating Agency Information

### Updating Contact & General Information

**Agency Administration**

You can update the information we have on file for your agency below.

General Info | gency Background | Users | Diligent Effort / SL-2 Favorites | Documents / E&O | Products / Commisions

**Test Insurance Agency**

**Mailing Address**

| | |
|---|---|
| Address: | 1234 Main Street |
| Address 2: | Unit 3b |
| City: | Jacksonville |
| State: | Florida |
| Postal Code: | 32204 |

**Physical Address**

| | |
|---|---|
| Address: | 1234 Main Street |
| Address 2: | |
| City: | Jacksonville |
| State: | Florida |
| Postal Code: | 32204 |

**Phone Numbers**

| | |
|---|---|
| Agency Phone Number: | 9041234567 |
| Agency Fax Number: | 9041245689 |

Update

**Agency License Numbers**

| State | License Number | Action |
|---|---|---|
| *No records returned.* | | |

Add New

**Email Notifications**

Notifications will be sent to the address below unless overridden at the User / Quote level.

*Note: You must update each User profile to utilize this agency setting.*

| Notification Type | Name | Email Address | Action |
|---|---|---|---|
| *No agency-level email address has been specified.* | | | |

Add New

On the *General Info* tab you can update the agency's mailing and physical address as well as the phone and fax numbers.

Make any changes (as necessary) and then click the **Update** button. If you do not click **Update**, any changes entered will not be saved.

Additionally, you are required to provide a copy of the agency license (as provided by the individual state you are licensed in). You will need to upload a license for each state you want to quote in. Simply click **Add New** and then follow the prompts to upload a copy of the agency license.

Additionally, you can set up default email addresses to be used for system-generated notifications. This can be useful if:

- You have one general email that you want all system-generated emails to go to, or
- The agent has a specific CSR who needs to receive all of the emails for his/her accounts.

To enable this feature, click **Add New** and then complete the two drop downs on the popup window.
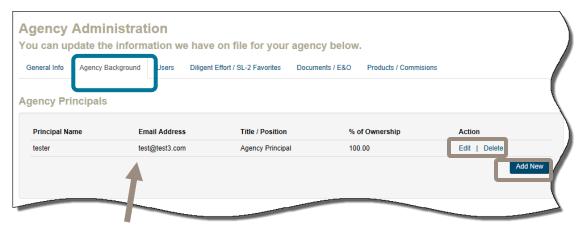
**Email Notifications**    ×

| | |
|---|---|
| Notification Type: | |
| Send Notifications To: | |

Save    Close

# Quick Reference—

COASTAL
Insurance Underwriters™

## Updating Agency Information

### Updating Principal & Officer Information

**Agency Administration**
You can update the information we have on file for your agency below.

General Info | Agency Background | Users | Diligent Effort / SL-2 Favorites | Documents / E&O | Products / Commisions

**Agency Principals**

| Principal Name | Email Address | Title / Position | % of Ownership | Action |
|---|---|---|---|---|
| tester | test@test3.com | Agency Principal | 100.00 | Edit | Delete |

Add New

On the *Agency Background* tab you can update the information relative to the agency's owners and officers.

### Updating User Logins

On the *Users* tab you can manage all of the users for your agency. This includes adding, removing and editing as well as resetting their passwords. This is also where you can designate users as Agency Admin or Agency Finance.

**Agency Administration**
You can update the information we have on file for your agency below.

General Info | Agency Background | Users | Diligent Effort / SL-2 Favorites | Documents / E&O | Products / Commisions

**Users**

| Email Address | First Name | Last Name | Phone | Agency Admin | Agency Finance | Action |
|---|---|---|---|---|---|---|
| john.doe@test.com | John | Doe | 9041234567 | ✔ | | Edit | |
| ttester@test.com | Tom | Tester | 111-2222 | | | Edit | Delete |

Add New

You can **Edit** and **Delete** as needed. When deleting a user, you must first select the user you want to transfer all of the associated policies to.

Click **Add New** to add a new user.

*NOTE: Please add user logins for each of your office personnel who needs access to the website. Please do not share logins.*

# Quick Reference—

## Updating Agency Information

**COASTAL**
Insurance Underwriters

### Creating Diligent Effort/SL2 Favorites

**Agency Administration**
You can update the information we have on file for your agency below.

General Info    Agency Background    Users    **Diligent Effort / SL-2 Favorites**    Documents / E&O    Products / Com

**Diligent Effort / SL-2 Favorites**

Manage Favorites for the following state: [            ▼]  **Get Favorites**

From the *Diligent Effort / SL-2 Favorites* tab, you can set favorites which will make completing the online diligent effort and SL-2 forms quick and easy.

First, choose your state from the drop down and click **Get Favorites.**

Using the drop down box, choose the name of the insurance company you want to set as a favorite. If you do not see the company listed, choose **Other** and type in the name of the carrier.

Enter the contact persons name, phone number and declination reason (e.g., underwriting reasons, zip code closed, etc.).

Once all information is entered, click **Add.**

**Florida Diligent Effort / SL-2 Favorites**

Manage Favorites for the following state: [Florida ▼]  **Modify**

**Add New Diligent Effort / SL-2 Favorite**
Insurer: [                          ▼]
Person Contacted: [            ]
Telephone Number: [            ]
Reason for Declination: [                          ]

**Add**

**Current Diligent Effort / SL-2 Favorites**
Insurer:    Test
Person Contacted:    Jane Doe
Telephone Number:    904123456
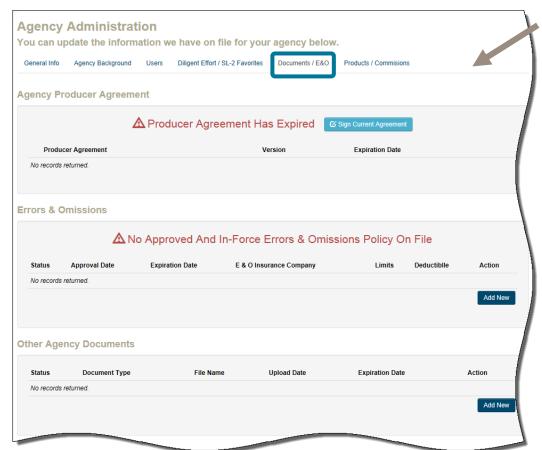Reason for Declination:    Does not meet underwriting guidelines

Edit
Delete

Existing carriers will be shown at the bottom of the page. You can **Edit** and **Delete** as needed.
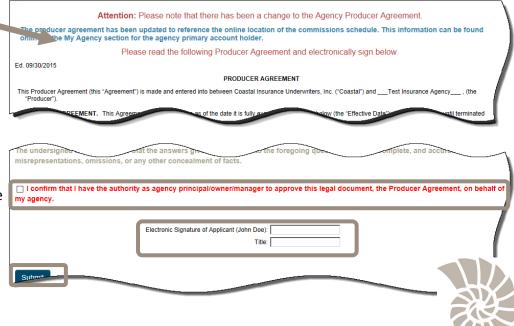
# Quick Reference—
# Updating Agency Information

**COASTAL**
Insurance Underwriters

## Producer Agreement, E&O, and Other Required Documents

**Agency Administration**
You can update the information we have on file for your agency below.

General Info | Agency Background | Users | Diligent Effort / SL-2 Favorites | Documents / E&O | Products / Commisions

**Agency Producer Agreement**

⚠ Producer Agreement Has Expired    ☑ Sign Current Agreement

| Producer Agreement | Version | Expiration Date |
| --- | --- | --- |

*No records returned.*

**Errors & Omissions**

⚠ No Approved And In-Force Errors & Omissions Policy On File

| Status | Approval Date | Expiration Date | E & O Insurance Company | Limits | Deductiblle | Action |
| --- | --- | --- | --- | --- | --- | --- |

*No records returned.*

Add New

**Other Agency Documents**

| Status | Document Type | File Name | Upload Date | Expiration Date | Action |
| --- | --- | --- | --- | --- | --- |

*No records returned.*

Add New

From the *Documents/E&O* tab you can review your producer agreement and other documents as well as upload new E&O information.

Clicking the **Sign Current Agreement** button will bring up the producer agreement. Review the agreement and then at the bottom:

1. Review and check the confirmation statement

2. Type in your name and the date.

3. Click **Submit.**

**Attention:** Please note that there has been a change to the Agency Producer Agreement.

The producer agreement has been updated to reference the online location of the commissions schedule. This information can be found online in the My Agency section for the agency primary account holder.

Please read the following Producer Agreement and electronically sign below.

Ed. 09/30/2015

**PRODUCER AGREEMENT**

This Producer Agreement (this "Agreement") is made and entered into between Coastal Insurance Underwriters, Inc. ("Coastal") and ___Test Insurance Agency___ , (the "Producer").

AGREEMENT. This Agreement ... as of the date it is fully ex... below (the "Effective Date" ... until terminated

The undersigned ... that the answers gi... the foregoing que... mplete, and accu... misrepresentations, omissions, or any other concealment of facts.

☐ **I confirm that I have the authority as agency principal/owner/manager to approve this legal document, the Producer Agreement, on behalf of my agency.**

Electronic Signature of Applicant (John Doe): [_____]
Title: [_____]

Submit

# Quick Reference—

COASTAL
Insurance Underwriters™

# Updating Agency Information

## Uploading New Errors & Omissions

**Errors & Omissions**                                    ×

E & O Insurance Company: [                    ]

Expiration Date: [                    ]

Limits: [                    ]

Deductible: [                    ]

E & O Document:  [ Upload Errors & Omissions Document ]

[ Save ]  Close

Clicking the **Add New** button in the Error's & Omissions section will bring up the Errors & Omissions popup.

To upload new E&O information:

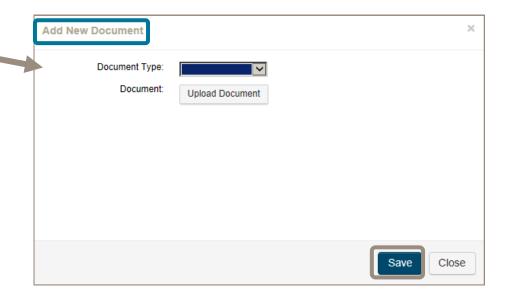1.  Complete the *E&O Insurance Company*, *Limits*, *Deductible*, and *Expiration Date* fields.
2.  Click **Upload Errors & Omissions Document** to upload a copy of the policy.
3.  Click **Submit.**

## Uploading Principal License, W9, & Other Documents

Clicking the **Add New** button in the Other Documents section will bring up the Add New Document popup.

From here:

1.  Choose the document type (Principal License, W9, or other).
2.  Click **Upload** Document to attach the document.
3.  Click **Save.**

**Add New Document**                                    ×

Document Type: [              ▾]

Document:  [ Upload Document ]

[ Save ]  [ Close ]

# Quick Reference—
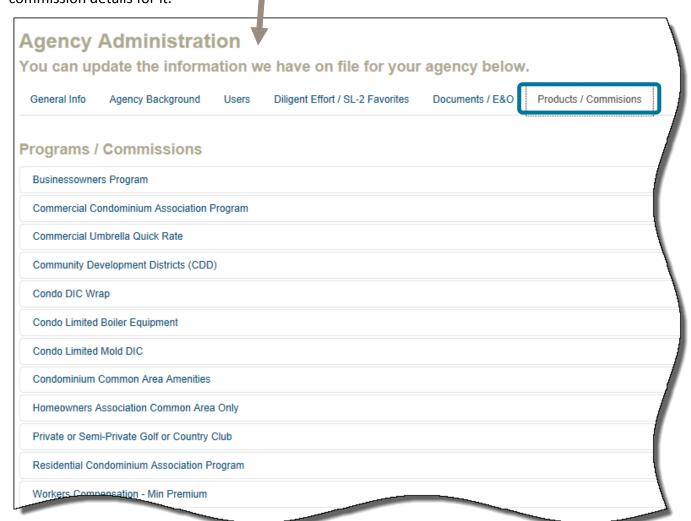## Updating Agency Information

### Viewing Products/Commissions Information

The *Products/Commissions* tab is where you can view the products your agency is appointed for AND the commission rate* for each product. Click the name of each program to open product and see the commission details for it.

**Agency Administration**
You can update the information we have on file for your agency below.

| General Info | Agency Background | Users | Diligent Effort / SL-2 Favorites | Documents / E&O | Products / Commisions |

**Programs / Commissions**

Businessowners Program

Commercial Condominium Association Program

Commercial Umbrella Quick Rate

Community Development Districts (CDD)

Condo DIC Wrap

Condo Limited Boiler Equipment

Condo Limited Mold DIC

Condominium Common Area Amenities

Homeowners Association Common Area Only

Private or Semi-Private Golf or Country Club

Residential Condominium Association Program

Workers Compensation - Min Premium

*The commission percentage on each individual quote may differ based on negotiations and would supersede this schedule.