



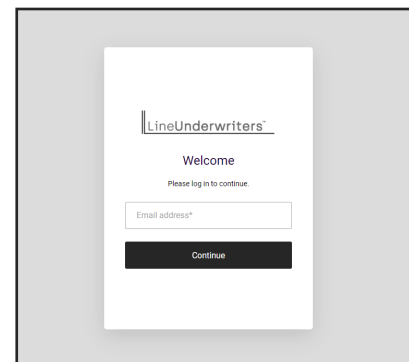
# E&S Coastal Businessowners Policy Service Guide

LineUnderwriter's policy platform puts the power to service policies back into your hands. Use this guide to learn about accessing the system, working tasks in the Inbox, setting up email subscriptions, looking up customers and policy documents, processing change requests and cancellations, and how to ask underwriting questions.

## Accessing the Portal

To begin, log into [my.lineunderwriters.com](https://my.lineunderwriters.com) and enter your Username and Password. User credentials are emailed to each user once appointed.

If you have not received this email, contact us at [coastline.support@lineunderwriters.com](mailto:coastline.support@lineunderwriters.com).

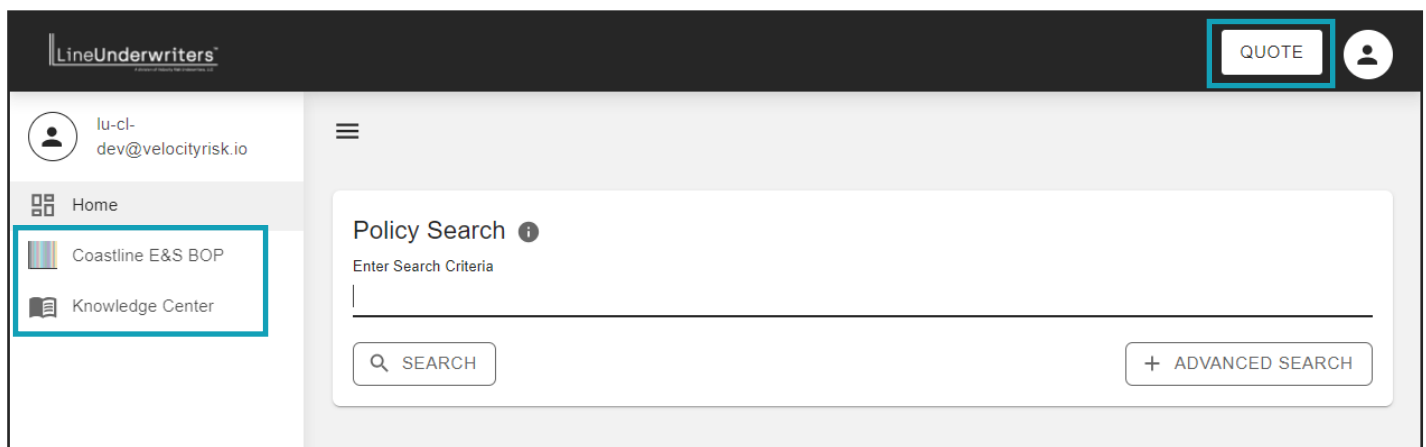


## Portal Dashboard

The dashboard provides quick links to our policy administration systems and our **Knowledge Center**, your online resource center for product and system information.

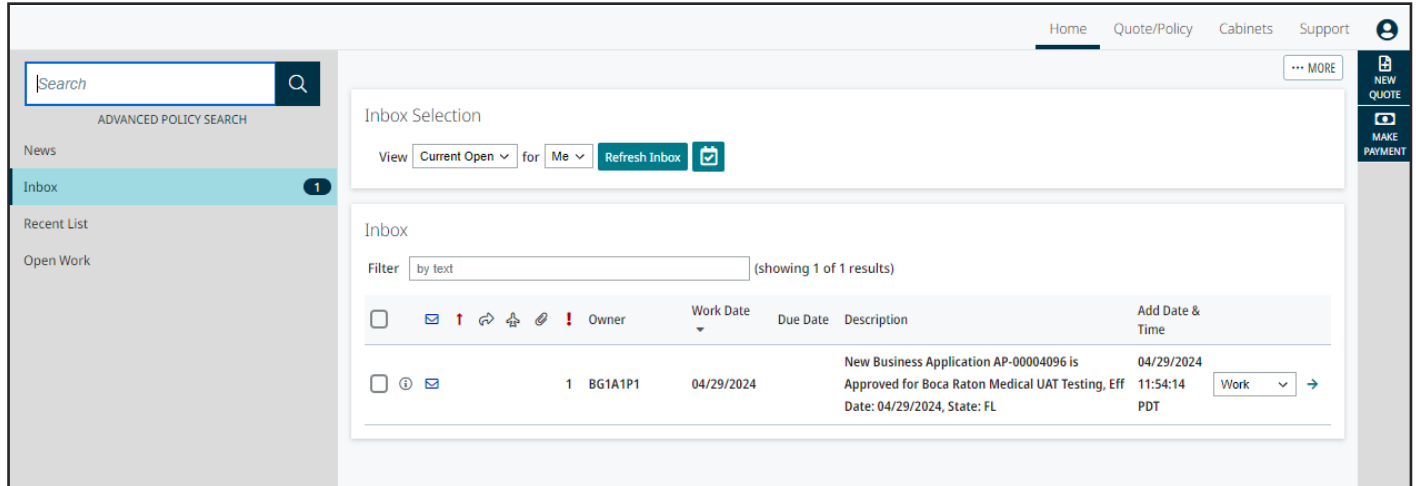
The Dashboard **Policy Search** feature will by name, address, policy/quote/app # across all platforms.

The **Coastline E&S BOP** link on the left is where all new quotes and policies will be generated. You will have access to service your new policies in this platform. You may also start a quote by clicking the **Quote** button on the top right.



## System Tasks and the Inbox

Our policy system manages notifications and tasks in the Inbox. Tasks in bold indicate new tasks that have not been viewed. The Recent List tab displays recently viewed policies and quotes. The Open Work tab list tasks that are currently open and active.

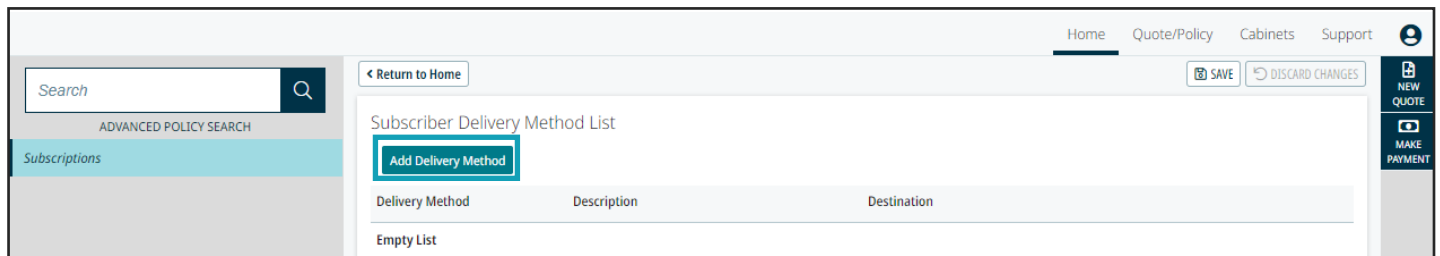
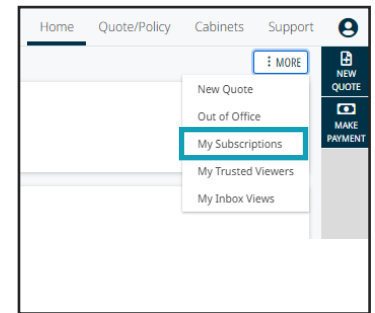


## Inbox Subscriptions

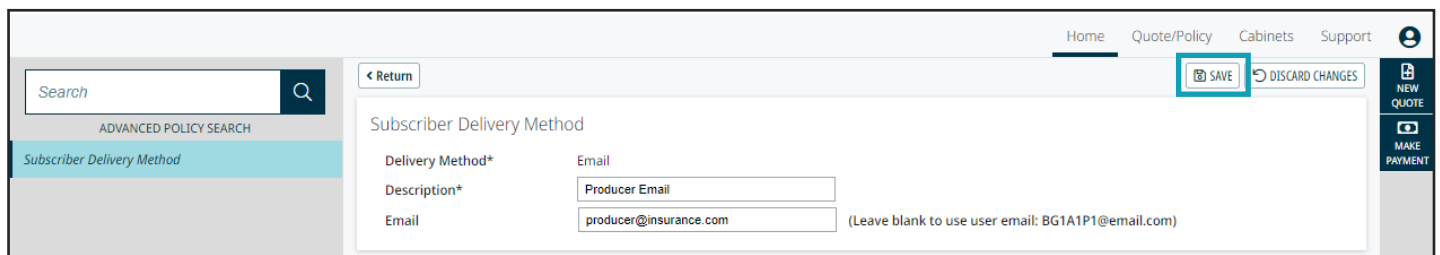
To receive Inbox notifications and Tasks to your email, set up a Subscription.

Select **My Subscriptions** from the More menu.

Click **Add Delivery Method** from the Subscriber Delivery Method List.



Choose the Email delivery method, enter a description, email, and **Save**. You can set up as many email delivery methods as needed.



## Inbox Subscriptions continued...

Select the tasks from the subscription list that you wish to have sent to your email. You can choose to have these tasks sent daily or immediately when generated. Select the Primary Delivery Method email you wish the tasks to go, as well as the format (HTML or Text) and **Save** the selection.

The screenshot shows the 'Subscriber Delivery Method List' and 'Subscription List' interface. The 'Subscriber Delivery Method List' table has the following data:

Delivery Method	Description	Destination
Email	Producer Email	producer@insurance.com

The 'Subscription List' table has the following data:

Select	Description	Delivery Method	Schedule	Delivery Format	Delivery Method	Schedule	Delivery Format
<input checked="" type="checkbox"/>	Tasks Assigned to Me	Producer Email	Immediate	HTML	Select...	Select...	Select...

Tasks will now be sent to the indicated email from [noreply@velocityrisk.com](mailto:noreply@velocityrisk.com). Be sure to add this email to your safe sender list.

## Working a Task

To work a task from the inbox, click the right arrow → on the far-right side of the task. The option in the drop-down field will default to **Work**. Options in the drop-down list are:

- **Work** - opens the item the task is associated with to work it.
- **Detail** - opens the task details and includes the task history
- **Suspend** - change the work date of the task
- **Transfer** - transfer the task to a new owner

The screenshot shows the 'Inbox Selection' and 'Inbox' interface. The 'Inbox' table has the following data:

Filter	by text	(showing 1 of 1 results)			
<input type="checkbox"/>	1	BG1A1P1	04/29/2024	New Business Application AP-00004096 is Approved for Boca Raton Medical UAT Testing, Eff Date: 04/29/2024, State: FL	04/29/2024 11:54:14 PDT

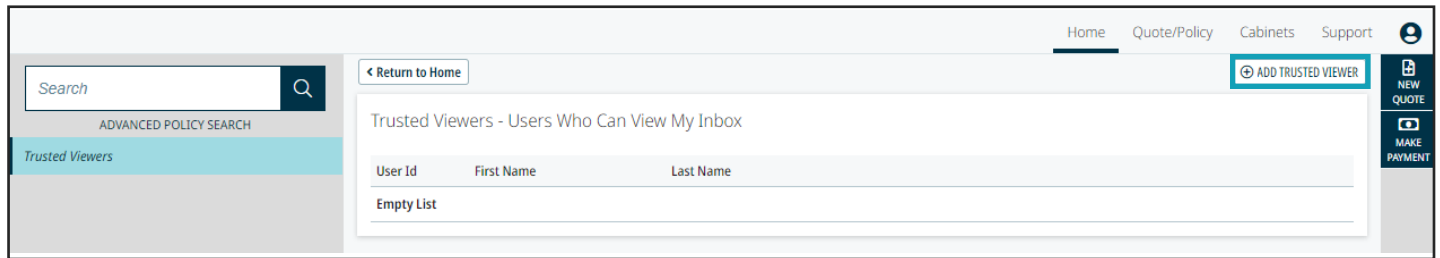
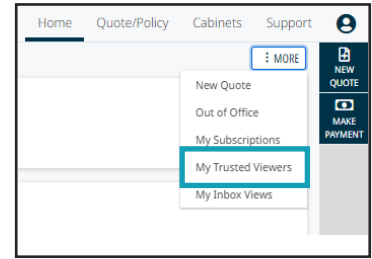
The dropdown menu for the task shows the following options: Work, Detail, Suspend, Transfer, and Work.

## Trusted Viewers

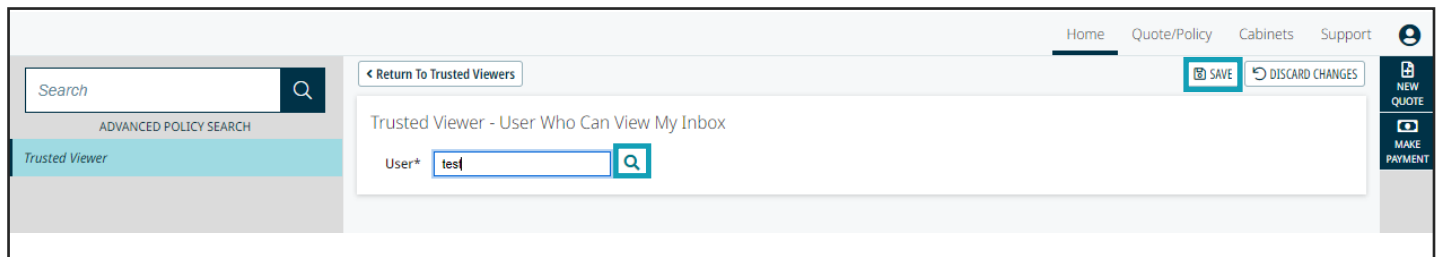
To allow others to view work items in your inbox set up a trusted viewer. Trusted viewers can work tasks directly in your inbox with the same options.

Select **My Trusted Viewers** from the More menu.

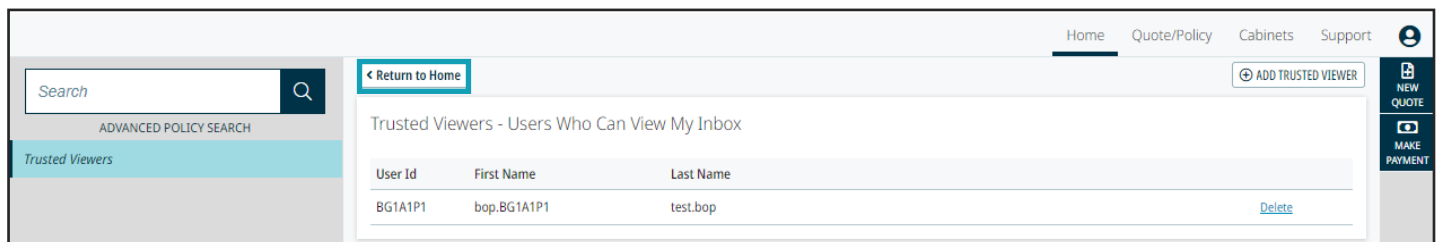
Click the **Add Trusted Viewer** button at top of the page.



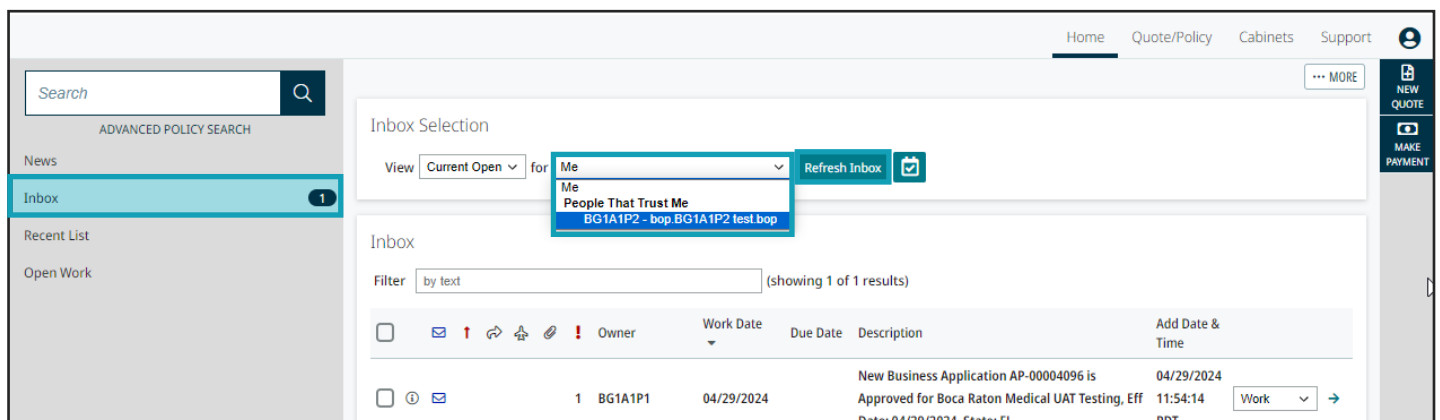
Click the search icon to search for the user you wish to designate as a trusted viewer and click on their name to add them to the trusted viewer list. Then click **Save**.



Review the list of trusted viewers and click **Return to Home**.



The user assigned as a trusted viewer will see the available inboxes under the **for** field. Select the desired inbox and click **Refresh Inbox** to view. The Inbox label reflects the selected inbox.



## Policy Look up

The **Search button** will permit you to search by policy, quote number, application, or customer name. To search by address click **Advanced Policy Search** and click the link in the Customer List.

The screenshot shows the 'Customer Lookup' section of the application. It includes a search bar at the top left with the text 'Search'. Below it is the 'ADVANCED POLICY SEARCH' section. The main area is titled 'Customer Lookup' and contains two search sections: 'Search By Customer' and 'Search By Insured'. Each section has dropdown menus for 'Name' and 'Text', a 'Starts With' dropdown, and a text input field. There are also 'Max Hits' dropdowns set to '10' and 'Search' buttons. Below the search sections is a 'Customer List' table with columns for Customer Number, Customer Name, Customer DBA, Entity Type, Email, and Phone Number. The table contains one entry for '2433 Test BOP LLC'.

Customer Number	Customer Name	Customer DBA	Entity Type	Email	Phone Number
2433	Test BOP LLC	Test BOP	Business	test@test.com	(678) 678-6789

## Policy Documents

All policy documents, including the application, declaration page, and invoices can be located under the **Policy File** tab.

To upload policy documentation such as loss runs, photos, and signed forms, click the **New Attachment** button, select the documentation type, browse the file, upload the document and Add Attachment.

The screenshot shows the 'Policy File' section of the application. It includes a search bar at the top left with the text 'Search'. Below it is the 'ADVANCED POLICY SEARCH' section. The main area is titled 'Policy File' and contains a list of policy files. The list has columns for 'Type' and 'Name'. The files listed are: 'Mortgage New Business Invoice', 'Application Package', 'New Business Package', 'Workflow Comments - Approved', 'Workflow Comments - Submission', and three 'Quote Summary Package' entries. To the right of the list is a 'New Policy Attachment' dialog box with a dropdown menu for 'Name\*' and a 'Select Files to Upload' button. The dropdown menu is open, showing options like 'Loss History', 'Inspection', 'Application', 'Photos', etc. At the bottom right of the dialog box are 'Add Attachment' and 'Clear' buttons. On the left side of the application, there is a sidebar with navigation options: 'History', 'Policy', 'Basic Details', 'Underwriting', 'Property', 'Coverages', 'Review', 'Loss History', 'Add'l Interests', 'Policy File' (highlighted), and 'Correspondence'.

## Commission Reports

Commission reports will be emailed to the email provided by the 30th of the month for the prior month production.

## Billing and Payments

Click the **Billing** section to see payment history and make payments. Agency billed policies will be sent a monthly invoice. Direct bill policies can make a payment using the **Make Payment** button, verify the policy number and click **Pay**. Commission statements are sent monthly. We accept all major credit cards and electronic checks.

The screenshot displays the 'Billing' section of the system. On the left, a navigation menu includes 'Billing' (highlighted in blue). The main content area shows an 'Account Summary' with details like 'Status: Item is Direct Bill With A Balance Due', 'Current Due Date: 04/16/2024', and 'Payoff: \$15,404.14'. Below this is a 'Billing Summary' table:

Total Premium	Total Fees	Premium Billed	Fees Billed	Premium Adjustments	Fees Adjustments	Premium Paid	Fees Paid
\$13,986.00	\$1,418.14	\$13,986.00	\$1,418.14	\$0.00	\$0.00	\$0.00	\$0.00

An 'Unbilled Schedule' table is also shown, currently empty. To the right, a 'Make a Payment' modal is open, showing the 'Policy Number' as 'BOP0000381' and buttons for 'Pay' and 'Clear'.

To make a payment, select payment method and enter payment details. Click **Submit Payment** to post the payment to the policy.

This screenshot shows the 'Make Payment' modal in more detail. It features a 'Return to Policy' button and a 'SUBMIT PAYMENT' button. Under the 'Account' section, there are three radio button options: 'Bank Account - XXXX3789', 'New ACH', and 'New Credit Card' (which is selected). Below these options, there are input fields for 'Amount\*' (set to '\$0') and 'Credit Card Number\*'. An 'Enter Credit Card Details' button is positioned next to the credit card number field.

## Policy Changes and Endorsements

Policy changes can be processed by clicking the **Endorse** button.

The screenshot shows the 'Policy Details' page. The 'Endorse' button is highlighted with a blue box. The page displays various policy information, including 'Effective Date\*', 'Expiration Date\*', 'Producer Code\*', and 'Insured Information'.

Effective Date*	Expiration Date*	Producer Code*	Surplus Line Producer*
05/08/2024	05/08/2025	BG1A1P1	Velocity Risk Underwriters, LLC-2040797

The 'Insured Information' section shows the name 'Lovely Shop'.

## Endorsements continued...

Select the effective date of the endorsement provide a brief description and click **Start**. The description will be displayed on the updated declarations page.

Make the change to the policy by clicking that section and making the adjustment and click **Finish**.

The Closeout section will display the premium adjustment if applicable. Click **Endorse Policy** to finalize the transaction.

Prior Full Term Premium	\$13,890.00	New Full Term Premium	\$14,140.00
Transaction Written Premium	\$241.78		
Total Transaction Premium	\$241.78		

A notification that the endorsement has been processed will be displayed. Click the link to access the policy.

Current Owner	Status	Policy Effective	Loss Date	Insured Name	L.O.B.	Reference
	Active	05/08/2024		Lovely Shop	Businessowners	<a href="#">BOP0000390-01</a>

## Endorsements continued...

The updated endorsement declaration is available in the Policy File section.

The screenshot shows the E&S BOP Service Guide interface. At the top, there are navigation tabs: Home, Quote/Policy, Cabinets, and Support. Below the navigation, there is a search bar and a table of premium and fee information. The table has columns for 'Policy Premium', 'Fees', 'Total Pro-rate Premium', 'Annual Premium', 'Fees', and 'Total Annual Premium'. The values are: Policy Premium: 8, Fees: \$11.83, Total Pro-rate Premium: \$253.61, Annual Premium: \$14,140.00, Fees: \$1,425.68, Total Annual Premium: \$15,565.68. The Policy TIV is \$1,500,000.00. The Policy Terms are 1-2 Endorsement. The main area displays the Policy File section, which includes a list of documents. The documents are: Endorsement Summary (05/20/2024 13:44:46 PDT), Endorsement Package (05/20/2024 13:44:41 PDT), Mortgagee New Business Invoice (05/01/2024 13:56:11 PDT), Application Package (05/01/2024 13:56:10 PDT), New Business Package (05/01/2024 13:56:08 PDT), Workflow Comments - Approved (05/01/2024 13:54:07 PDT), Workflow Comments - Submission (05/01/2024 13:51:56 PDT), Quote Summary Package (05/01/2024 13:42:29 PDT), Quote Summary Package (05/01/2024 13:41:30 PDT), Quote Summary Package (05/01/2024 13:39:36 PDT), and Quote Summary Package (05/01/2024 13:38:41 PDT). The 'Endorsement Package' document is highlighted with a blue box.

## Cancellations

Requests to cancel a policy must be submitted to our team by emailing [coastline.underwriting@lineunderwriters.com](mailto:coastline.underwriting@lineunderwriters.com). A signed LPR and any additional needed documentation is required.

## Underwriting Communications

Questions to underwriting may be submitted by emailing our team at [coastline.underwriting@lineunderwriters.com](mailto:coastline.underwriting@lineunderwriters.com).