



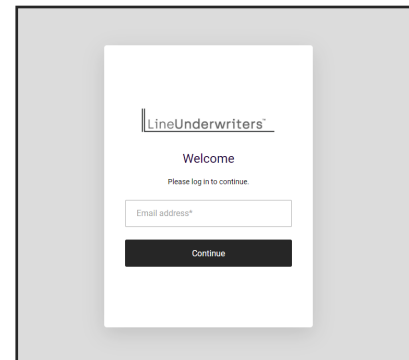
E&S Coastal Businessowners Policy Service Guide

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 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.

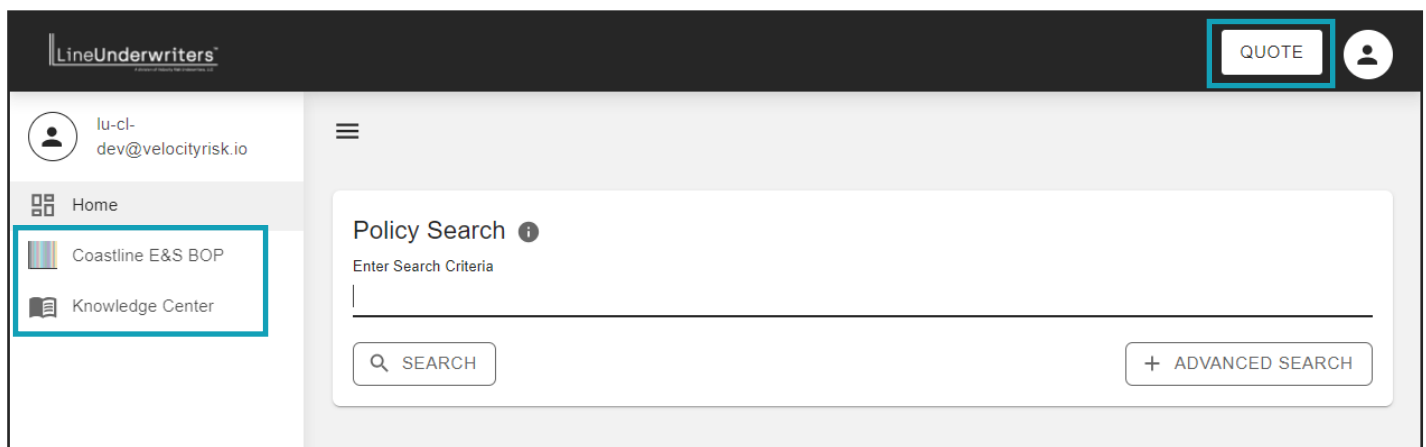


Portal Dashboard

The dashboard provides quick links to our policy administration systems and our [Knowledge Center](#), your online resource center for product and system information.

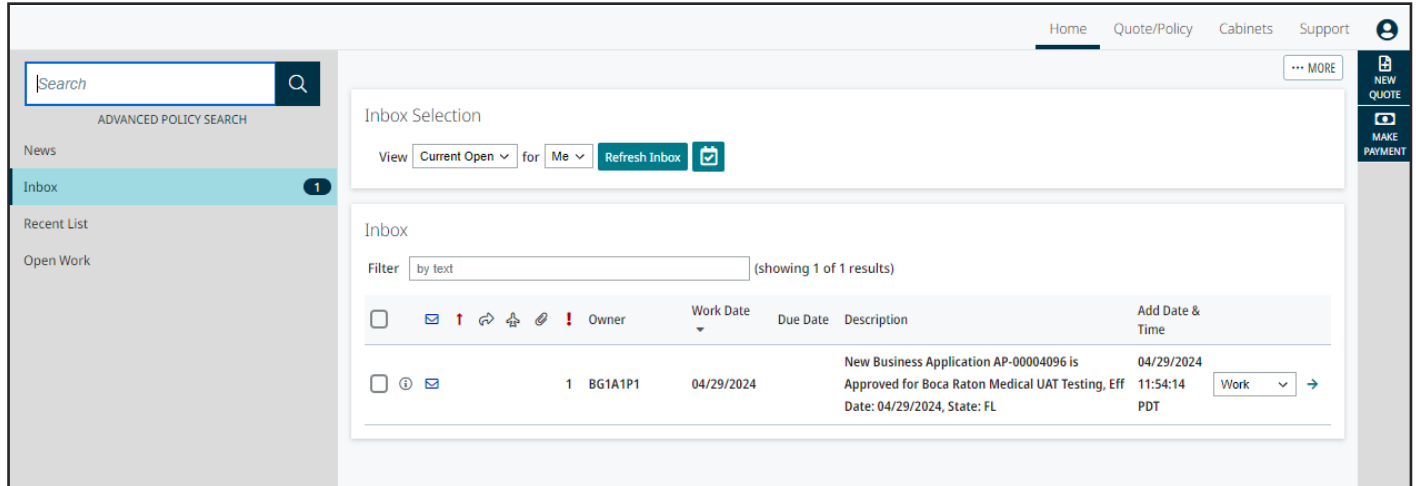
The Dashboard [Policy Search](#) feature will by name, address, policy/quote/app # across all platforms.

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.

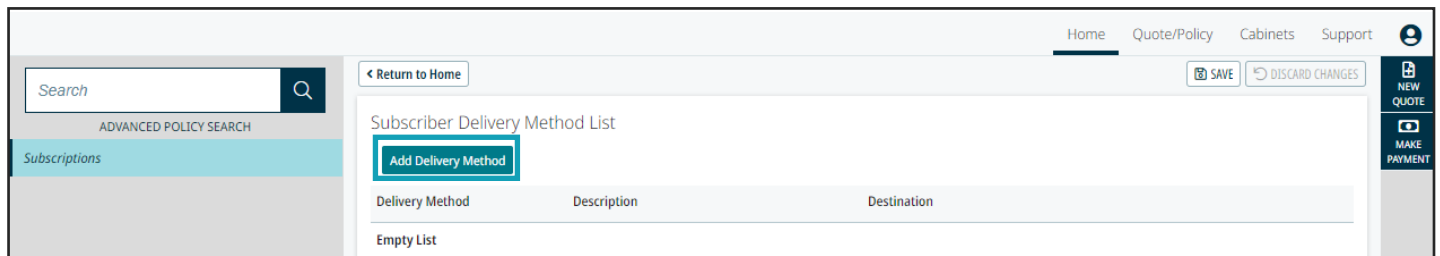
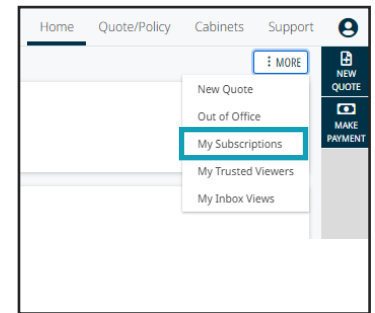


Inbox Subscriptions

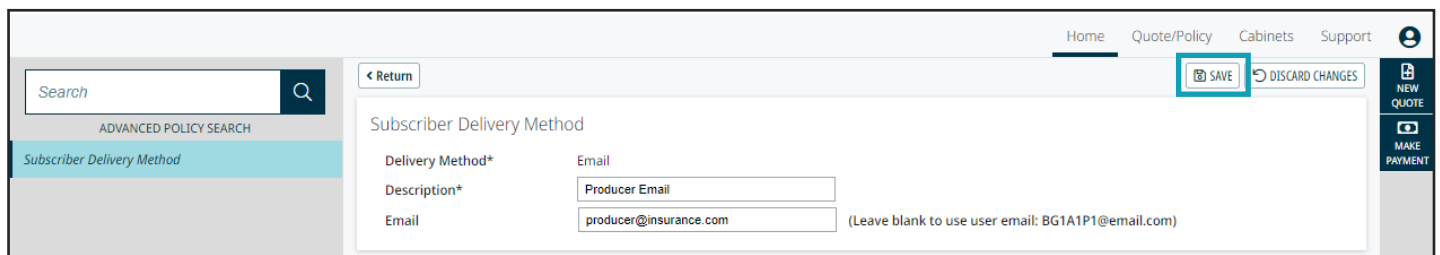
To receive Inbox notifications and Tasks to your email, set up a Subscription.

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' section includes a table with columns for Delivery Method, Description, and Destination. A single entry is shown with 'Email' as the delivery method, 'Producer Email' as the description, and 'producer@insurance.com' as the destination. Below this is the 'Subscription List' section, which includes a checkbox for 'Send me email in digest when possible' and a table with columns for Select, Description, Delivery Method, Schedule, Delivery Format, and Delivery Method, Schedule, Delivery Format. A task is selected with a checkbox, and the delivery method is set to 'Producer Email', the schedule to 'Immediate', and the format to 'HTML'.

Tasks will now be sent to the indicated email from 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

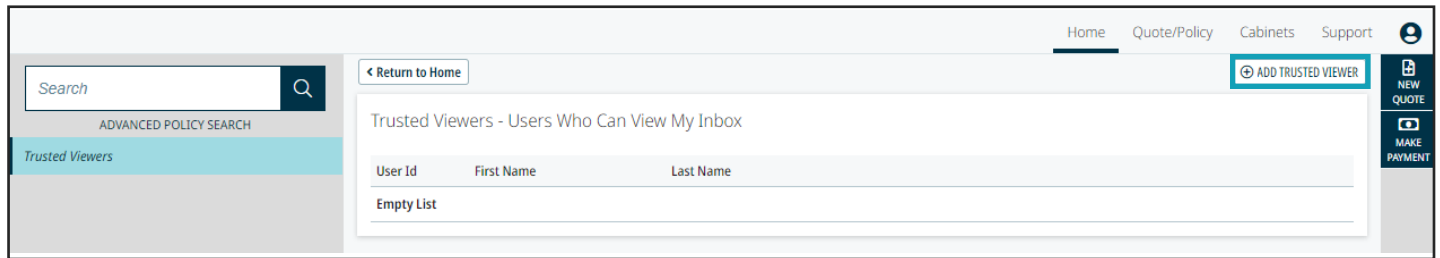
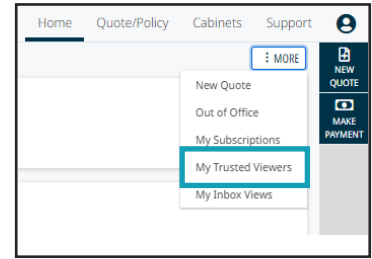
The screenshot shows the 'Inbox Selection' and 'Inbox' interface. The 'Inbox Selection' section includes a 'View' dropdown set to 'Current Open' and a 'for' dropdown set to 'Me'. The 'Inbox' section includes a search filter and a table with columns for Owner, Work Date, Due Date, Description, and Add Date & Time. A task is shown with '1 BG1A1P1' as the owner, '04/29/2024' as the work date, and 'New Business Application AP-00004096 is Approved for Boca Raton Medical UAT Testing, Eff Date: 04/29/2024, State: FL' as the description. A dropdown menu is open on the right side of the task, showing options: 'Work', 'Detail', 'Suspend', 'Transfer', and 'Work'.

Trusted Viewers

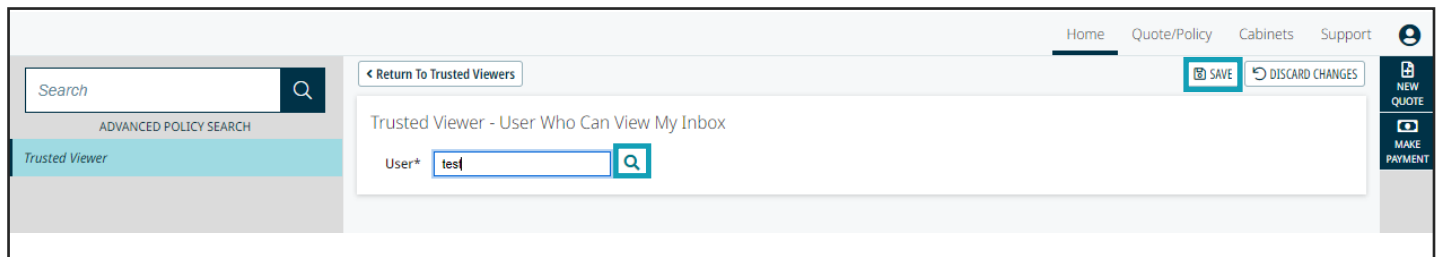
To allow others to view work items in your inbox set up a trusted viewer. Trusted viewers can work tasks directly in your inbox with the same options.

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

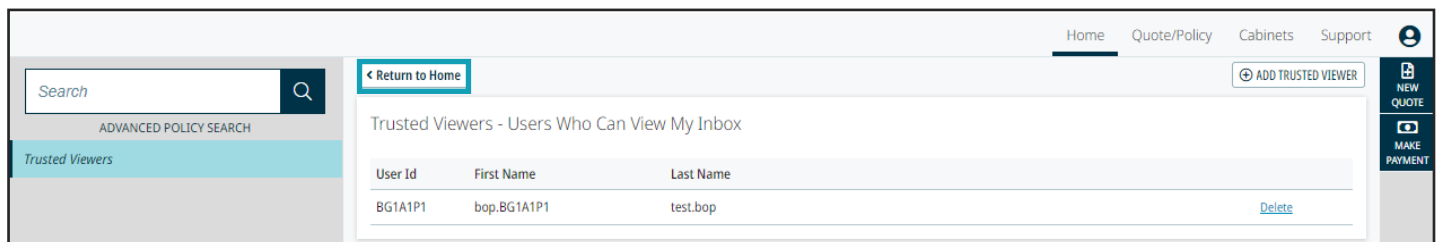
Click the **Add Trusted Viewer** button at top of the page.



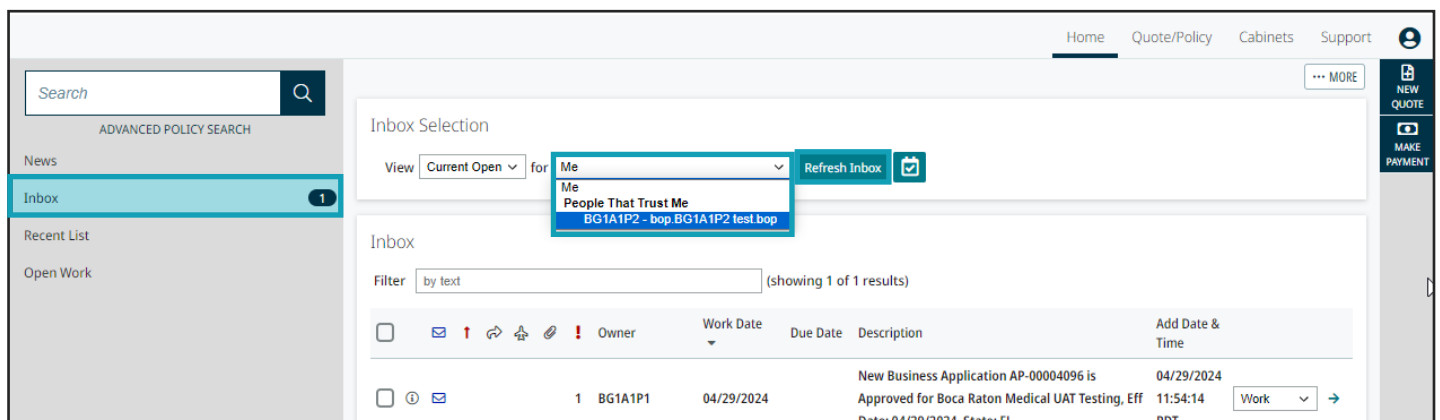
Click the search icon to search for the user you wish to designate as a trusted viewer and click on their name to add them to the trusted viewer list. Then click **Save**.



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' and a magnifying glass icon. Below it is the 'ADVANCED POLICY SEARCH' section. The main area contains search filters for 'Search By Customer' and 'Search By Insured', each with dropdown menus for 'Name' and 'Text', and 'Starts With' fields. There are 'Max Hits' dropdowns set to '10' and 'Search' buttons. Below the filters is a 'Customer List' table with columns for Customer Number, Customer Name, Customer DBA, Entity Type, Email, and Phone Number. A single row is visible with the following data:

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 features a sidebar with navigation options like 'Basic Details', 'Underwriting', 'Property', 'Coverages', 'Review', 'Loss History', and 'Policy File' (which is highlighted). The main area displays a 'Policy File' section with filters and a list of items. A 'New Policy Attachment' dialog box is open on the right, showing a dropdown menu for selecting a document type. The selected type is 'Loss History'. Below the dropdown is a 'Select Files to Upload' button and an 'Add Attachment' button. The background shows a table with columns for 'POLICY', 'Sequence', 'Trans Effective', 'Trans Status', 'Annual Premium', 'Fees', and 'Total Annual P'.

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.

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

Policy Changes and Endorsements

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

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.

Premium Type	Amount
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	BOP0000390-01

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 with columns: Premium, Fees, Total Pro-rate Premium, Annual Premium, Fees, and Total Annual Premium. The table contains data for a policy with a TIV of \$1,500,000.00 and Policy Terms of 1-2 Endorsement. The main content area is titled 'Policy File' and shows a list of items for Policy: BOP0000390-01 (05/08/2024 to 05/08/2025). The items are listed in a table with columns: Type, Name, DateTime, and Email Status. The 'Endorsement Package' item is highlighted.

Type	Name	DateTime	Email Status
<input type="checkbox"/>	Endorsement Summary	05/20/2024 13:44:46 PDT	
<input checked="" type="checkbox"/>	Endorsement Package	05/20/2024 13:44:41 PDT	
<input type="checkbox"/>	Mortgagee New Business Invoice	05/01/2024 13:56:11 PDT	
<input type="checkbox"/>	Application Package	05/01/2024 13:56:10 PDT	
<input type="checkbox"/>	New Business Package	05/01/2024 13:56:08 PDT	
<input type="checkbox"/>	Workflow Comments - Approved	05/01/2024 13:54:07 PDT	
<input type="checkbox"/>	Workflow Comments - Submission	05/01/2024 13:51:56 PDT	
<input type="checkbox"/>	Quote Summary Package	05/01/2024 13:42:29 PDT	
<input type="checkbox"/>	Quote Summary Package	05/01/2024 13:41:30 PDT	
<input type="checkbox"/>	Quote Summary Package	05/01/2024 13:39:36 PDT	
<input type="checkbox"/>	Quote Summary Package	05/01/2024 13:38:41 PDT	

Cancellations

Requests to cancel a policy must be submitted to our team by emailing 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.

Signing the Application and Delivery Preference

All policies require a signed application. The preferred method is to utilize the e-signature function that is built into our system. When the delivery preference is **Email** an application is automatically sent to the provided insured email once the policy is bound. In addition, all policy documents are delivered electronically to the insured. If the delivery preference is **Agency**, the agency will assume responsibility of collecting the signed application as well as delivering all documents to the insured. Policy documents are located in the Policy File tab.

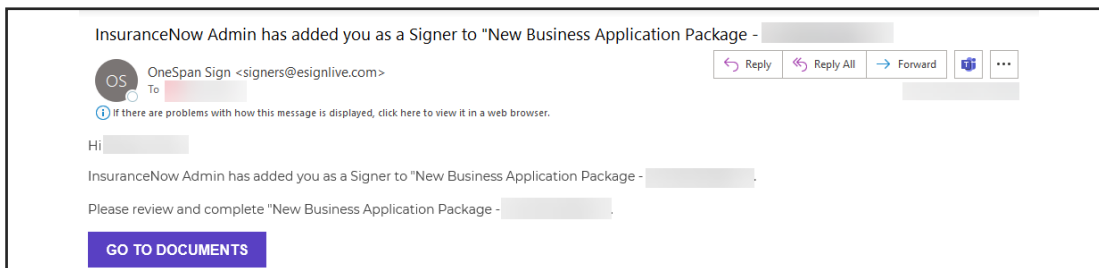
Contact

Primary Phone* Mobile (555) 777-8888

Email* test@test.com

Delivery Preference Email

The request to electronically sign the application is emailed to the insured immediately upon binding the policy. The email will direct the insured to **Go To Documents** to review and sign. Once the insured completes signing the application, the agency will receive an email to sign as well. The email will be sent to the email address for the user that bound the policy.



Once both the insured and agent signatures are completed the **Policy File** will reflect the e-signed application. Click the link to view the signed application. If the application needs to be resent click the **Reprocess icon**. If necessary, the email address can also be changed under the reprocess icon and will not update the email address on the policy.

Filters	Items	DateTime	Email Status
Policy	Policy: BOP0000470-01 (09/25/2024 to 09/25/2025)		
Customer: 3070 - WSO Construction	Type		
...another Policy	<input type="checkbox"/> Application (E-sign)	10/01/2024 07:43:54 PDT	<input checked="" type="checkbox"/>
...another Customer	<input type="checkbox"/> Application Package	10/01/2024 07:27:20 PDT	<input type="checkbox"/>
	<input type="checkbox"/> New Business Invoice	09/25/2024 11:33:48 PDT	<input type="checkbox"/>
	<input type="checkbox"/> Application Package	09/25/2024 11:33:45 PDT	<input type="checkbox"/>
	<input type="checkbox"/> New Business Package	09/25/2024 11:33:43 PDT	<input type="checkbox"/>
	<input type="checkbox"/> Quote Summary Package	09/25/2024 11:30:45 PDT	<input type="checkbox"/>
	<input type="checkbox"/> Quote Summary Package	09/25/2024 11:30:43 PDT	<input type="checkbox"/>