

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 <u>my.lineunderwriters.com</u> 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 <u>coastline.support@lineunderwriters.com</u>.



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.

LineUnderwriters [®]		
lu-cl- dev@velocityrisk.io	=	
Home		
Coastline E&S BOP	Policy Search Enter Search Criteria	
Knowledge Center	I	
	Q SEARCH	+ ADVANCED SEARCH

*CoastLine is a product of LineUnderwriters, a division of Velocity Risk Underwriters, LLC., ("Velocity Risk") a managing general agency and subsidiary of Velocity HoldCo, LLC., a Delaware limited liability company. Velocity Risk's National Producer Number ("NPN") 17685436 is and does business as Velocity Risk Insurance Agency in the following states: CA. #0k75926, NV. #3139629, NY. #PC-1416409, #BR-1416409 & EX-1416409. Velocity Risk provides underwriting and administrative services for surplus lines insurers and develops insurance policies from retail agents and wholesale brokers. Velocity Risk does not solicit insurance directly from the public.

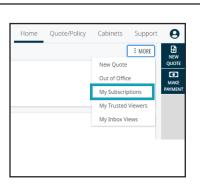
System Tasks and the Inbox

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.

		Home Quo	ote/Policy	Cabinets	Support	0
Search Q					··· MORE	NEW QUOTE
ADVANCED POLICY SEARCH	Inbox Selection					MAKE PAYMENT
Inbox	View Current Open > for Me > Refresh Inbox					
Recent List	Inbox					
Open Work	Filter by text (showing 1 of 1 results)					
	□ I I I I I I I I I I I I I I I I I I I		Add Date & Time			
	③ ☑ 1 BG1A1P1 04/29/2024 New Business Application AP-0000 ④ ④ 1 BG1A1P1 04/29/2024 Approved for Boca Raton Medical Date: 04/29/2024, State: FL	UAT Testing, Eff	04/29/2024 11:54:14 PDT	Work	~ →	

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.

				Home	Quote/Policy	Cabinets	Support	0
Search Q	< Return to Home				SAV	E S DISCAR	D CHANGES	NEW QUOTE
ADVANCED POLICY SEARCH Subscriptions	Subscriber Delivery Me	thod List						MAKE PAYMENT
	Delivery Method	Description	Destination					
	Empty List							

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

			Home Q	uote/Policy	Cabinets	Support	0
Search Q	< Return			SAVE	D DISCARD	CHANGES	NEW QUOTE
ADVANCED POLICY SEARCH	Subscriber Delivery Metho	od					
Subscriber Delivery Method	Delivery Method*	Email					MAKE PAYMENT
	Description*	Producer Email					
	Email	producer@insurance.com	(Leave blank to use user email: BG1A1P1@email	.com)			

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.

Search Q	< Return to Home			SAVE DISCARD CHANGES
ADVANCED POLICY SEARCH	Subscriber Delivery Met	thod List		
Subscriptions	Add Delivery Method			MAKE PAYMEN
	Delivery Method	Description	Destination	
	Email	Producer Email	producer@insurance.com	Edit Delete
	Subscription List			
				Send me email in digest when possible
			Primary Delivery	Secondary Delivery
	Select Description	Delivery Me	thod Schedule Delivery Format	Delivery Method Schedule Delivery Format
	Tasks Assigned to Me	Producer f	Email V Immediate V HTML V	Select V Select V

Tasks will now be sent to the indicated email from <u>noreply@velocityrisk.com</u>. 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 \rightarrow 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

		Home Q	uote/Policy	Cabinets	Support	0
Search Q				(··· MORE	NEW QUOTE
ADVANCED POLICY SEARCH	Inbox Selection					MAKE
News	View Current Open - for Me - Refresh Inbox					PAYMENT
Inbox						
Recent List	Inbox					
Open Work	Filter by text (showing 1 of 1 results)					
	U I I I I Work Date Due Date Description		Add Date & Time			
	Image: Second state of the second		04/29/2024 11:54:14 PDT	Work V Detail Suspend Transfer	→	
				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.

					Home	Quote/Policy	Cabinets	Support	Θ
Search Q Return to Home							⊕ ADD TRUST	ED VIEWER	NEW
ADVANCED POLICY SEARCH	Trusted View	wers - Users Who Can Vi							
Trusted Viewers	User Id	First Name	Last Name						MAKE PAYMENT
Empty List									

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**.

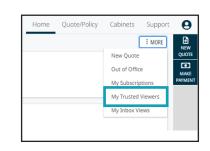
		Home	Quote/Policy	Cabinets	Support	0
Search Q	< Return To Trusted Viewers		SAV	re ් ් D discard	CHANGES	NEW QUOTE
ADVANCED POLICY SEARCH	Trusted Viewer - User Who Can View My Inbox					MAKE
Trusted Viewer	User* test Q					PAYMENT

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

				Home	Quote/Policy	Cabinets	Support	9
Search Q	< Return to Home	2				ADD TRUST	ED VIEWER	NEW QUOTE
ADVANCED POLICY SEARCH	Trusted Vie	wers - Users Who	Can View My Inbox					MAKE
Trusted Viewers	User Id	First Name	Last Name					PAYMENT
	BG1A1P1	bop.BG1A1P1	test.bop			<u>Delete</u>		

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.

	_	Home Quote/Policy	Cabinets Support 🕒
Search Q			··· MORE NEW QUOTE
ADVANCED POLICY SEARCH	Inbox Selection		
News	View Current Open V for Me Refresh Inbox		MAKE
Inbox	Me People That Trust Me BG1A1P2 - bop.BG1A1P2 test bop		
Recent List	Inbox		
Open Work	Filter by text (showing 1 of 1 results)		
	□ ▷ ↑ 🕫 🖧 🖉 ! Owner 🛛 Work Date Due Date Description	Add Date & Time	k .
	Image: State State New Business Application AP-0000- Image: State State State 1 BG1A1P1 04/29/2024 Approved for Boca Raton Medical U		4 Work ∽ →



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.

						Home Quote/P	Policy Cabinets Suppor	t 😑
Search Q	< Return to Home						⊕ NEW CUSTOMER	NEW QUOTE
ADVANCED POLICY SEARCH	Customer Lookup							MAKE
Customer Policy List	Policy Number	Sea	rch					PAYMENT
	Search By Customer	Name ~	Text	Starts With 🗸 test				
	and	Select Y	Text	Starts With ~		Max Hits 10) 🗸 Search	
	Search By Insured	Name ~	Text	Starts With ~				
	and	Select Y	Text	Starts With ~		Max Hits 10	Search	
	Customer List						+ -	
	Customer Number	Customer Name		Customer DBA	Entity Type	Email	Phone Number	
	<u> 2433 </u>	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.

Search	POLICY e Sequence Trans Effe		Annual Premium Fees Total Annual P	New Policy Attachment 🛱 🏵 SUMMARY
ADVANCED POLICY SEARCH			\$13,890.00 \$1,413.46 \$15,303.46	Name*
History	< Return to Home		ADD ATTACHMENT ADD NO	Loss History VQUOTE
Policy ~	Policy File			Inspection Make Application PAYENT
Basic Details	Filters	Items		Loss History Miscellaneous
Underwriting	Policy	Policy: BOP0	000390-01 (05/08/2024 to 05/08/2025)	Photos TIMELINE Cancellation request
Property	Customer: 2887 - Lovely Shop	Туре	Name	Claim Referral Duss Run New Note
1 - Main Building	another Policy	() ⊞ 🗋	Mortgagee New Business Invoice	0
1 - Building - 1	another Customer		Application Package	NEW ATTACH
Coverages		() ⊞ 🗋	New Business Package	/ · · · · · · · · · · · · · · · · · · ·
Review			Workflow Comments - Approved	Select Files to Upload
Loss History		□ 🗄 🕞	Workflow Comments - Submission	
		□ 🗄 🖂	Quote Summary Package	Show Advanced Options
Addt'l Interests			Quote Summary Package	
My Mortgage Company-First Mort			Quote Summary Package	
Policy File			Quote Summary Package	Add Attachment Clear
Correspondence				

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.

		Home	Quote/Policy Cabinets Support Q	Make a Payment	r 🤿 🖽
Search Q ADVANCED POLICY SEARCH	POLICY pe Sequence Trans Effective Trans Status 1.1 04/16/2024 Active	Annual Premium Fees Total Annual Premium \$13,986.00 \$1,418.15 \$15,404.15	Policy TIV Policy Terms \$975,000.00 1-1 New Business >	Policy Number	
History			VIEW NOTES ···· MORE QUOTE	BOP0000381	NEW QUOTE
Policy ~ Basic Details	Account Summary Status Item is Direct Bill With A Balance Due			Pay	MAKE Clear PAYMEN
Underwriting Property 1 - Location 1	Bill To Insured Payment Plan Current Due Date 04/16/2024 Current Due Payoff \$15,404.14 Next Action	Automated Pay In Full <u>change Pay Plan</u> \$15,404.14 Equity Date 04/ Electronic Payment on 04/16/2024	6/2024		
1 - Location 1 1 - Building - 1 Coverages	Billing Summary		NEW ATIACH #=		NEW NOTE
Review Loss History	Total Premium Total Fees Premium Bille \$13,986.00 \$1,418.14 \$13,986.0		mium Paid Fees Paid TASK \$0.00 \$0.00		O NEW ATTACH
Addt'l Interests Forms	Unbilled Schedule		+ -		¥⊟ New TASK
Policy File	# Bill Date Due Date	Status Premium	Bill Amount		
Correspondence	Empty List				
Tasks					
Claims	Invoice Summary		+ -		
Billing	Invoice Date Due Date	Amount Due Payof	Amount Type		
eSignature	⊕ 04/16/2024 04/16/2024	\$15,404.14 \$	5,404.14 Installment		

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

Search Q	Account Number	Insured Beaumont Sedgwick Testing	Policy Term 04/16/2024 - 04/16/2025	Account Status Normal	Carry Date 04/16/2024	Pay Plan Automated Pay In Full	Current Due \$15,404.14	
ADVANCED POLICY SEARCH	< Return to Policy					SU	BMIT PAYMENT	NEW
Account Payment	Males Deverant						_	QUOTE
	Make Payment							MAKE
	Account	Last used	Delete					PAYMENT
	O Bank Account - XXXX3789		Installment					
	O New ACH							
	💽 New Credit Card							
	Amount*	S 0	Enter Credit Card Details					
	Credit Card Number*							

Policy Changes and Endorsements

Home Quote/Policy Cabinets Support 0 POLICY **2** Trans Effective Trans Status Policy TIV Policy Terms Sequence 1-1 Total Annual Premium Q Annual Premium Fees Search 05/08/2024 Active \$1,500,000,00 1-1 New Business 🗸 UMMA \$13,890.00 \$1,413.46 \$15,303,46 ADVANCED POLICY SEARCH VIEW NOTES ... MORE ENDORSE History < Return to Home Policy Basic Details Basic Details Effective Date* 05/08/2024 Expiration Date* 05/08/2025 Underwriting Producer Code* BG1A1P1 Producer - BG1A1P1 Surplus Line Producer* Velocity Risk Underwrtiers, LLC-2040797 🗸 Property Insured Information 1 - Main Building 1 - Building - 1 Name* Lovely Shop

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.

ENDORSEMENT		×
Start Transaction Effective Date* Description*	Endorsement 05/20/2024 Add XVZ Co as Additional Insured	
Additional Declaration Text		
		Start Cancel

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

							H	lome	Quote/Policy	Cabinets	Support	Θ
Search		plication Number -00004114	Policy Number BOP0000390	Insured Lovely Shop	State TX	Annual Premium			nnual Premium	Product Businesso	s wners B	
ADVANCED POLICY SEARCH						\$13,890.00	\$1,413.46	\$15,303	3.46			H NEW
Endorsement	< Return to Additional Inter	ests				ſ	🕲 SAVE	FINISH	ل COPY کے DISC	ARD CHANGES	··· MORE	QUOTE
Application	Additional Interest											MAKE PAYMENT
Basic Details	Additional Interest	Detail										Ø
Underwriting	Search Existing Additional Interest		Q									TIMELINE
Property	Interest Type*	Additional Insured	I - Vendors			~						NEW NOTE
1 - Main Building	Loan Number											Ø
1 - Building - 1	Forms	Additional Insured	I - Vendors - LUCL	NA AI 013 02 2	4 🗸							NEW ATTACH
+ Add Building	Name*	XYZ Company		<i>/</i> / 8								¥⊟ NEW
+ Add Location	Mail To Name*	XYZ Company		Сор	y From Nam	ne						TASK
+ Add Location												

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

						Н	ome Quote/Policy	Cabinets Suppo	rt \varTheta
Search Q	QUOTE REVIEW Application Number	Policy Number BOP0000390	Insured Lovely Shop	State TX	Annual Premium		Total Annual Premium		SL 🔳 BI SUMMARY
ADVANCED POLICY SEARCH					\$14,140.00	\$1,425.68	\$15,565.68		NEW
Closeout					ENDORSE POLICY	PEND FOR REL	EASE PREVIEW OUTPUT	MODIFY QUOTE MORE	QUOTE
	Premium Review								NEW ATTACH
	Prior Full Term Premium \$13,890.	1 OC	New Full Term P	remium	\$14,140.00				NEW TASK
	Transaction Written \$241. Premium	78							
	Total Transaction Premium \$241.	78							
	Inspection Contact								
	Inspection Contact Name*								
		777-8888 est.com							
	Email Aduress"	CSLOUTI							

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

Search	8 Endorsement has been processed for BOP0000390-01	NEW QUOTE
ADVANCED POLICY SEARCH		MAKE
News		MORE PAYMENT
Inbox	Recent Activity	+ -
Recent List		· -
Open Work	Filter by text (showing 16 of 16 results) Underwriting	
	Show All Show None Quote Application Policy	
	Current Owner Status Policy Loss Date Insured Name L.O.B. Reference	
	Active 05/08/2024 Lovely Shop Businessowners B00000390-01	

Endorsements continued...

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

Search Q	POLICY :e Premium Fees Tota	l Pro-rate Premiur	m Annual Premium Fees Total Annua	al Premium Policy TIV	Policy Terms	
	8 \$11.83 \$25	3.61	\$14,140.00 \$1,425.68 \$15,565.68	\$1,500,000.00	1-2 Endorsement V	SI
ADVANCED POLICY SEARCH						
History	< Return to Home		🖉 ADD ATTACHMENT	D NOTE ADD CORRESPONDENCE	VIEW NOTES ···· MORE	
Policy	Policy File				+ -	P
Basic Details	Filters	Items		Combin	e Docs Split Docs	
Underwriting	Policy	Policy: BOP	0000390-01 (05/08/2024 to 05/08/2025)			т
Property	Customer: 2887 - Lovely Shop	🗌 Туре	Name	DateTime 🔻	Email Status	
1 - Main Building	🗀another Policy		Endorsement Summary	05/20/2024 13:44:46 PD	T C'	
1 - Building - 1	another Customer	() ⊕ 🗋	Endorsement Package	05/20/2024 13:44:41 PD	T <mark>C</mark> C	AT
Coverages		() ⊞ []	Mortgagee New Business Invoice	05/01/2024 13:56:11 PD	T <mark>8</mark> C	
Review			Application Package	05/01/2024 13:56:10 PD	r C	
Loss History			New Business Package	05/01/2024 13:56:08 PD	ା ପ୍ର ପ	
Addt'l Interests			Workflow Comments - Approved	05/01/2024 13:54:07 PD	т	
			Workflow Comments - Submission	05/01/2024 13:51:56 PD	т	
My Mortgage Company-First Mort			Quote Summary Package	05/01/2024 13:42:29 PD	r C'	
XYZ Company-Additional Insured			Quote Summary Package	05/01/2024 13:41:30 PD	r C'	
Forms			Quote Summary Package	05/01/2024 13:39:36 PD	r C	
Policy File		□ 🗄 🖂	Quote Summary Package	05/01/2024 13:38:41 PD	r C'	

Cancellations

Requests to cancel a policy must be submitted to our team by emailing <u>coastline.underwriting@</u> <u>lineunderwriters.com</u>. A signed LPR and any additional needed documentation is required.

Underwriting Communications

Questions to underwriting may be submitted by emailing our team at <u>coastline.underwriting@</u><u>lineunderwriters.com</u>.

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 🗸	
	Email	
	Agency	

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.

InsuranceNow Admin has added you as a Signer to "New Business Application Pac	kage -
Os OneSpan Sign <signers@esignlive.com></signers@esignlive.com>	$\begin{array}{c c c c c c c c c c c c c c c c c c c $
() If there are problems with how this message is displayed, click here to view it in a web browser.	
Hi	
InsuranceNow Admin has added you as a Signer to "New Business Application Package -	
Please review and complete "New Business Application Package -	
GO TO DOCUMENTS	

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.

icy File					+
ters	Items			Combine Docs	Split Doc
Policy	Policy: BOP00004	70-01 (09/25/2024 to 09/25/2025)			
Customer: 3070 - WSO Construction	🗌 Туре	Name	DateTime 🔻	Email Status	_
another Policy		Application(E-sign)	10/01/2024 07:43:54 PDT		(
another Customer		Application Package	10/01/2024 07:27:20 PDT		(
	□ ⊞ 🗋	New Business Invoice	09/25/2024 11:33:48 PDT	ß	C
		Application Package	09/25/2024 11:33:45 PDT		C
		New Business Package	09/25/2024 11:33:43 PDT	Ø	C
		Quote Summary Package	09/25/2024 11:30:45 PDT		(
		Quote Summary Package	09/25/2024 11:30:43 PDT		(