



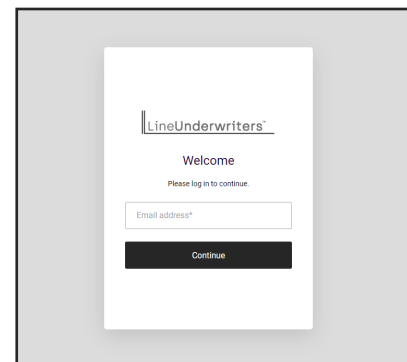
# E&S Coastal Businessowners Policy Service Guide

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).

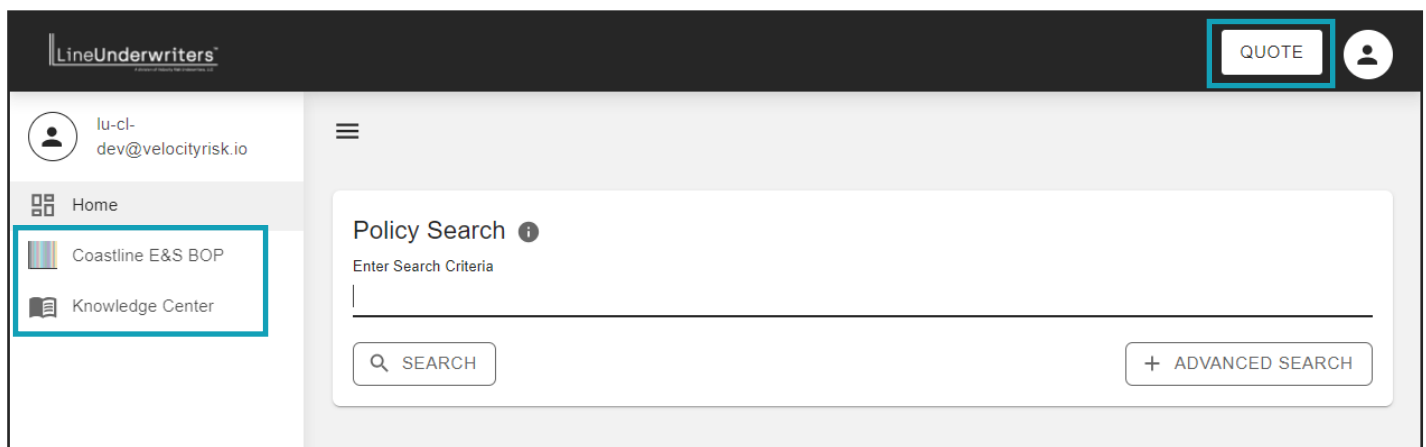


## Portal Dashboard

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

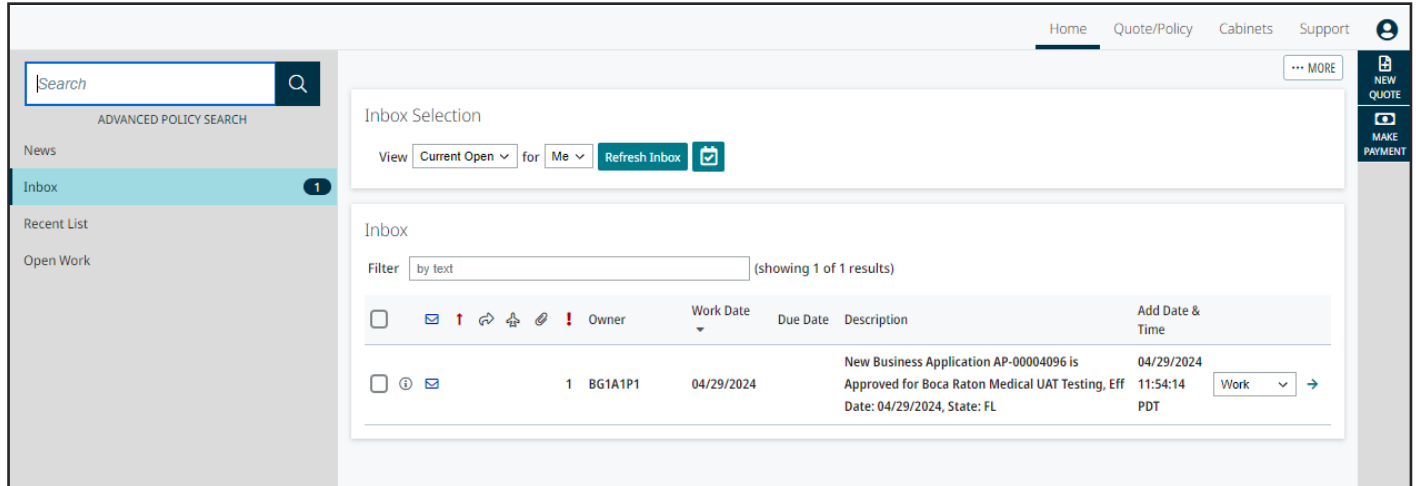
The Dashboard [Policy Search](#) feature will by name, address, policy/quote/app # across all platforms.

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.

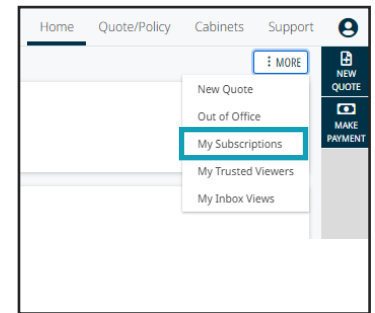


## Inbox Subscriptions

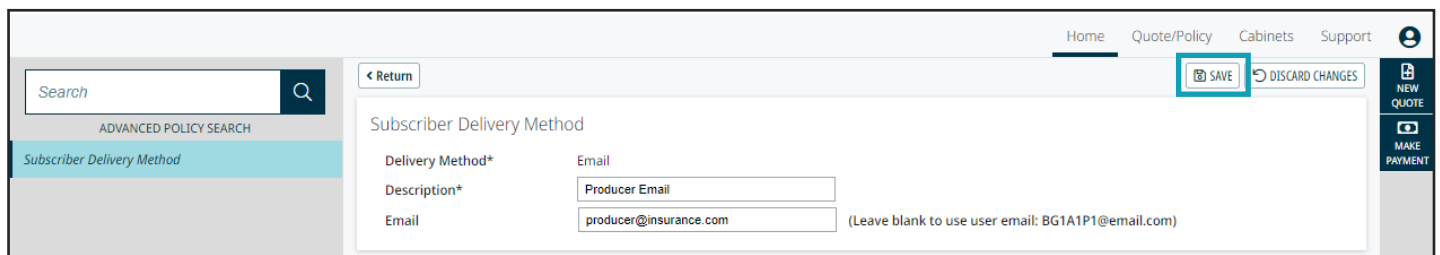
To receive Inbox notifications and Tasks to your email, set up a Subscription.

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

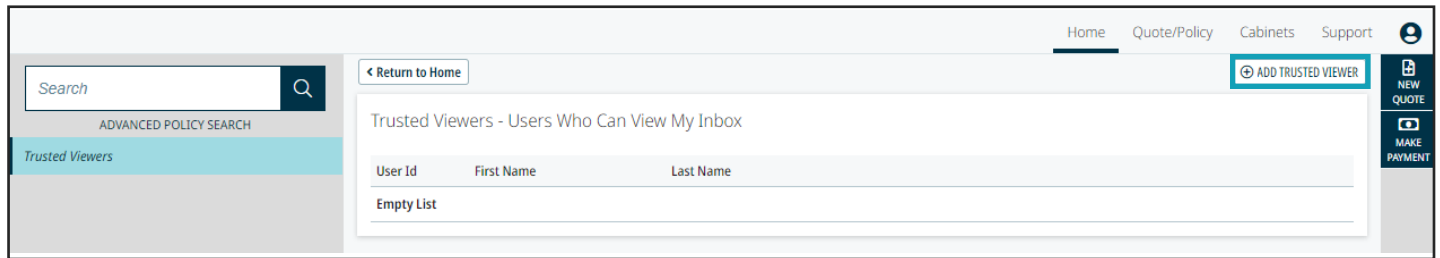
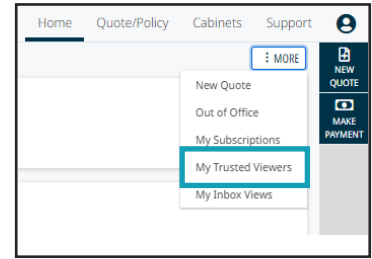
The dropdown menu for the task shows the following options: Work, Detail, Suspend, Transfer, and Work.

## Trusted Viewers

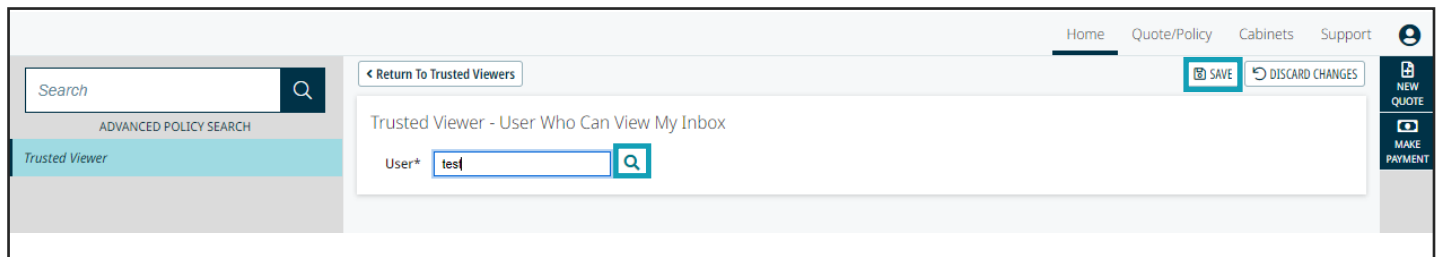
To allow others to view work items in your inbox set up a trusted viewer. Trusted viewers can work tasks directly in your inbox with the same options.

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

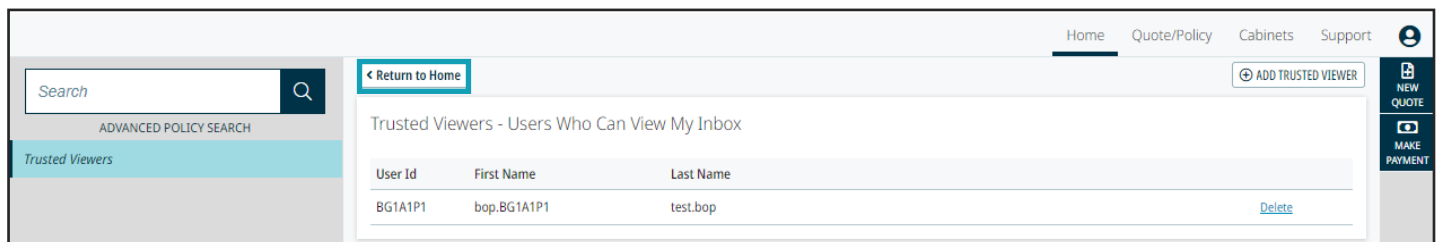
Click the **Add Trusted Viewer** button at top of the page.



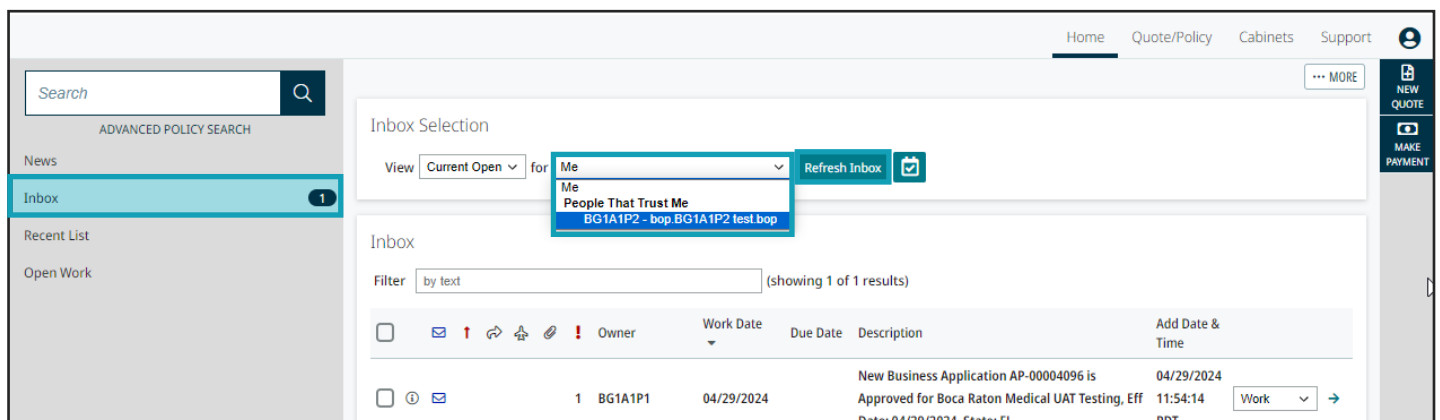
Click the search icon to search for the user you wish to designate as a trusted viewer and click on their name to add them to the trusted viewer list. Then click **Save**.



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' and a magnifying glass icon. Below it is the 'ADVANCED POLICY SEARCH' section. The main area is titled 'Customer Lookup' and contains two search forms. The first form is for 'Search By Customer' with fields for Name (dropdown), Text, and Starts With (dropdown). The second form is for 'Search By Insured' with similar fields. Both forms have a 'Max Hits' dropdown set to '10' and a 'Search' button. Below the search forms is a 'Customer List' section with a table of results.

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' and a magnifying glass icon. Below it is the 'ADVANCED POLICY SEARCH' section. The main area is titled 'Policy File' and contains a list of documents. On the right side, there is a 'New Policy Attachment' dialog box with a dropdown menu for selecting the document type. The 'Add Attachment' button is visible at the bottom right.

Sequence	Trans Effective	Trans Status	Annual Premium	Fees	Total Annual P
1-1	05/08/2024	Active	\$13,890.00	\$1,413.46	\$15,303.46

Filters	Items
<ul style="list-style-type: none"> <li>Policy</li> <li>Customer: 2887 - Lovely Shop                             <ul style="list-style-type: none"> <li>...another Policy</li> <li>...another Customer</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Policy: BOP0000390-01 (05/08/2024 to 05/08/2025)</li> <li>Mortgagee New Business Invoice</li> <li>Application Package</li> <li>New Business Package</li> <li>Workflow Comments - Approved</li> <li>Workflow Comments - Submission</li> <li>Quote Summary Package</li> <li>Quote Summary Package</li> <li>Quote Summary Package</li> <li>Quote Summary Package</li> </ul>

## Commission Reports

Commission reports may be downloaded by the designated agency contact on 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. An 'Invoice Summary' table at the bottom shows one invoice due on 04/16/2024 for \$15,404.14. On 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, three options are listed: 'Bank Account - XXXX3789', 'New ACH', and 'New Credit Card' (which is selected with a blue radio button). 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 'Basic Details' section of a policy. At the top, a navigation bar includes 'Endorse' (highlighted in blue) and 'VIEW NOTES'. The 'Basic Details' section contains the following information:

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

The 'Insured Information' section shows the name 'Lovely Shop'. The 'Annual Premium' is \$13,890.00, 'Fees' are \$1,413.46, and 'Total Annual Premium' is \$15,303.46. The 'Policy TIV' is \$1,500,000.00 and 'Policy Terms' are '1-1 New Business'.

## 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 Review			
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 information. The table has columns for 'Pro-rate Premium', 'Annual Premium', and 'Fees'. The 'Endorsement Package' document is highlighted in the list.

Pro-rate Premium	Annual Premium	Fees	Total Annual Premium
\$253.61	\$14,140.00	\$1,425.68	\$15,565.68

Filters	Items
Policy	Policy: BOP0000390-01 (05/08/2024 to 05/08/2025)
Customer: 2887 - Lovely Shop	Endorsement Summary
...another Policy	Endorsement Package
...another Customer	Mortgagee New Business Invoice
	Application Package
	New Business Package
	Workflow Comments - Approved
	Workflow Comments - Submission
	Quote Summary Package
	Quote Summary Package
	Quote Summary Package
	Quote Summary Package

## 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).



## 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.

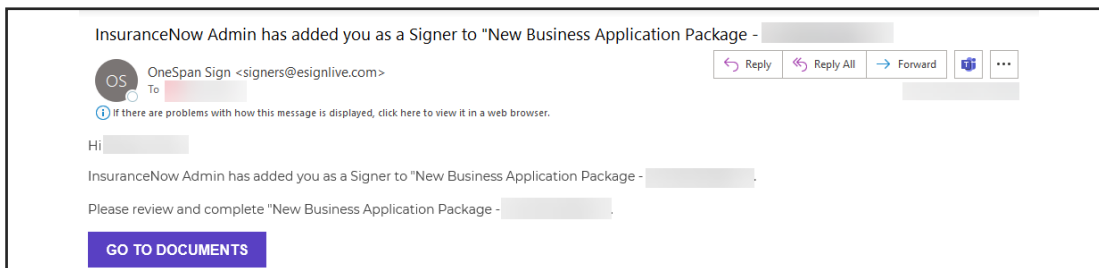
Contact

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.



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.

Policy File

Filters: Policy, Customer: 3070 - WSO Construction, ...another Policy, ...another Customer

Type	Name	DateTime	Email Status
<input type="checkbox"/>	Application (E-sign)	10/01/2024 07:43:54 PDT	
<input type="checkbox"/>	Application Package	10/01/2024 07:27:20 PDT	
<input type="checkbox"/>	New Business Invoice	09/25/2024 11:33:48 PDT	
<input type="checkbox"/>	Application Package	09/25/2024 11:33:45 PDT	
<input type="checkbox"/>	New Business Package	09/25/2024 11:33:43 PDT	
<input type="checkbox"/>	Quote Summary Package	09/25/2024 11:30:45 PDT	
<input type="checkbox"/>	Quote Summary Package	09/25/2024 11:30:43 PDT	