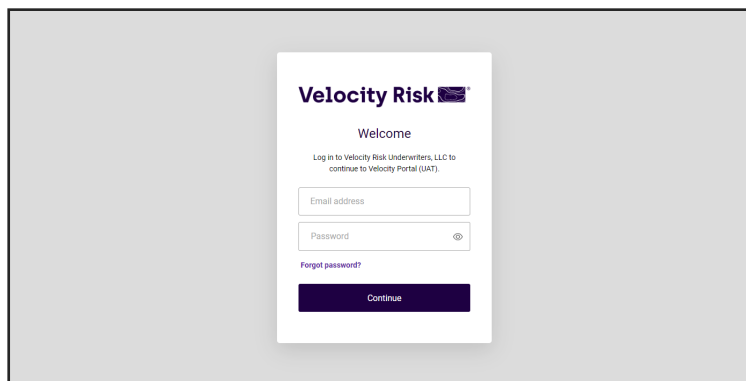


Velocity's policy platform puts the power to service policies back into your hands. Use this guide to learn about accessing the system, working tasks in the Inbox, setting up email subscriptions, looking up customers and policy documents, processing change requests and cancellations, and how to ask underwriting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

Accessing the Portal

To begin, log into my.velocityrisk.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 marketing@velocityrisk.com.



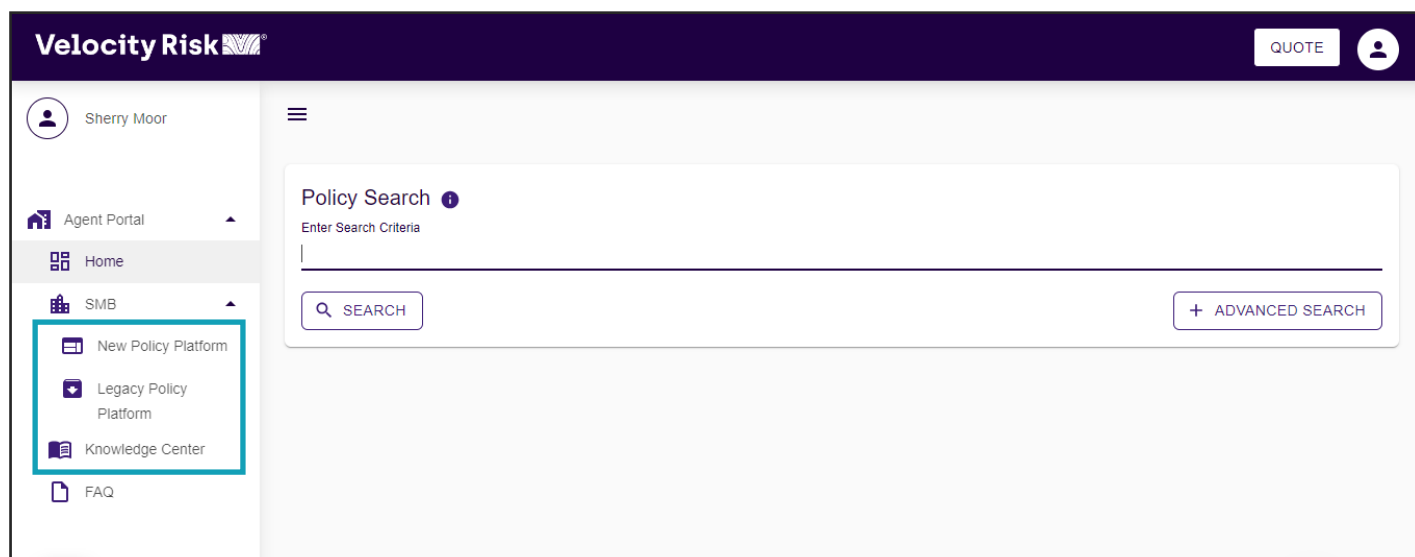
Portal Dashboard

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

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

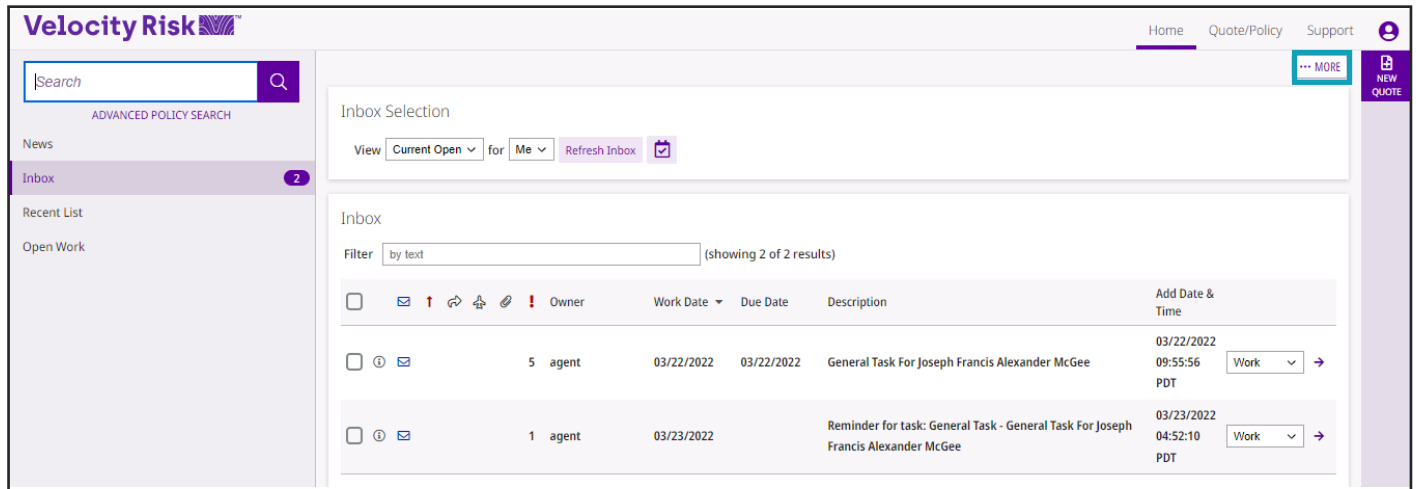
The **New Policy Platform** is our new system where all new quotes and policies will be generated. You will have access to service your new policies in this platform.

The **Legacy Policy Platform** is where you can access your existing customer details in our previous system. You will not be able to create new quotes in the legacy policy platform.



System Tasks and the Inbox

Our new 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.

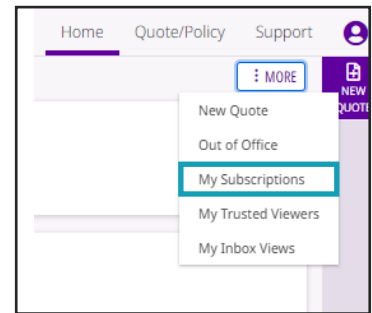


Inbox Subscriptions

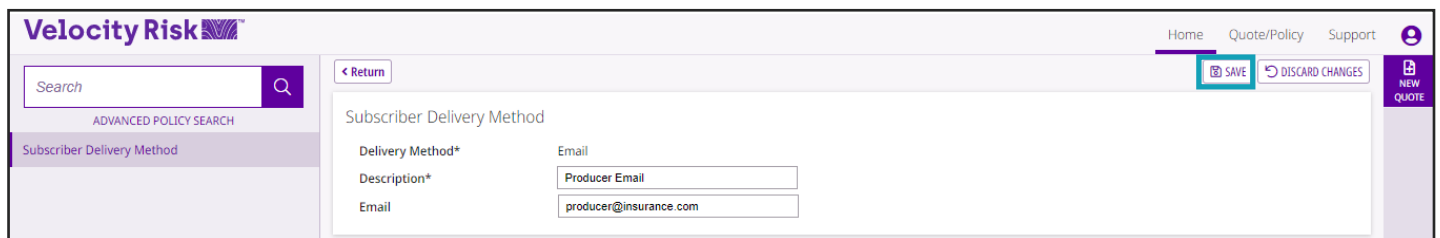
To receive Inbox notifications and Tasks to your email, set up a Subscription.

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 Velocity Risk interface. At the top, there are navigation links for Home, Quote/Policy, and Support. A search bar is visible on the left. The main content area is titled 'Subscriber Delivery Method List' and includes a table with the following data:

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

Below this is the 'Subscription List' section, which includes a table with columns for Select, Description, Schedule, Primary Delivery Method, Primary Delivery Format, Secondary Delivery Method, and Secondary Delivery Format. The table contains two rows of tasks:

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

A 'SAVE' button is highlighted in a red box in the top right corner of the interface.

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

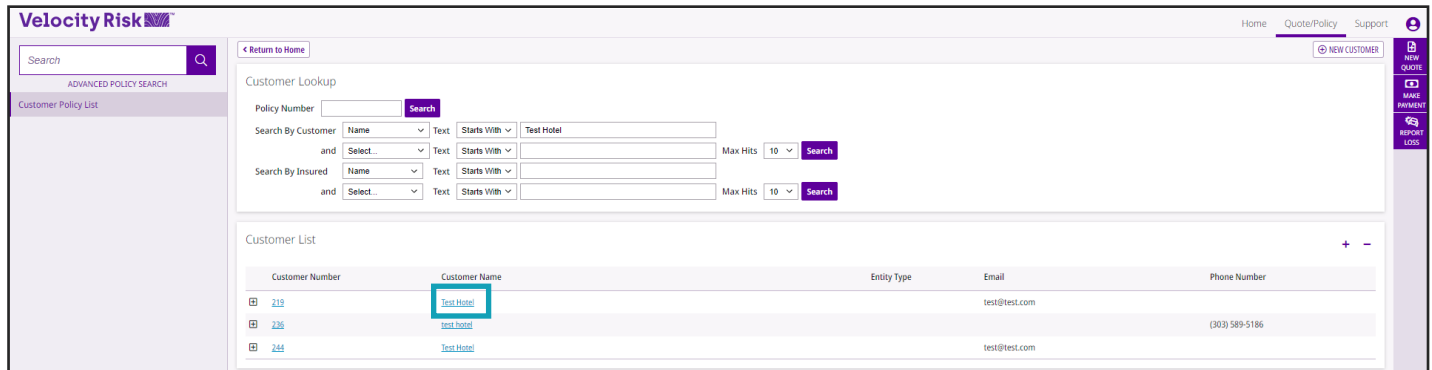
The screenshot shows the Velocity Risk interface. At the top, there are navigation links for Home, Quote/Policy, and Support. A search bar is visible on the left. The main content area is titled 'Inbox Selection' and includes a table with the following data:

Filter	by text	(showing 2 of 2 results)
<input type="checkbox"/>	5 agent	03/22/2022 03/22/2022 General Task For Joseph Francis Alexander McGee
<input type="checkbox"/>	1 agent	03/23/2022 Reminder for task: General Task - General Task For Joseph Francis Alexander McGee

The 'Work' button is highlighted in a red box in the bottom right corner of the interface.

Policy Look up

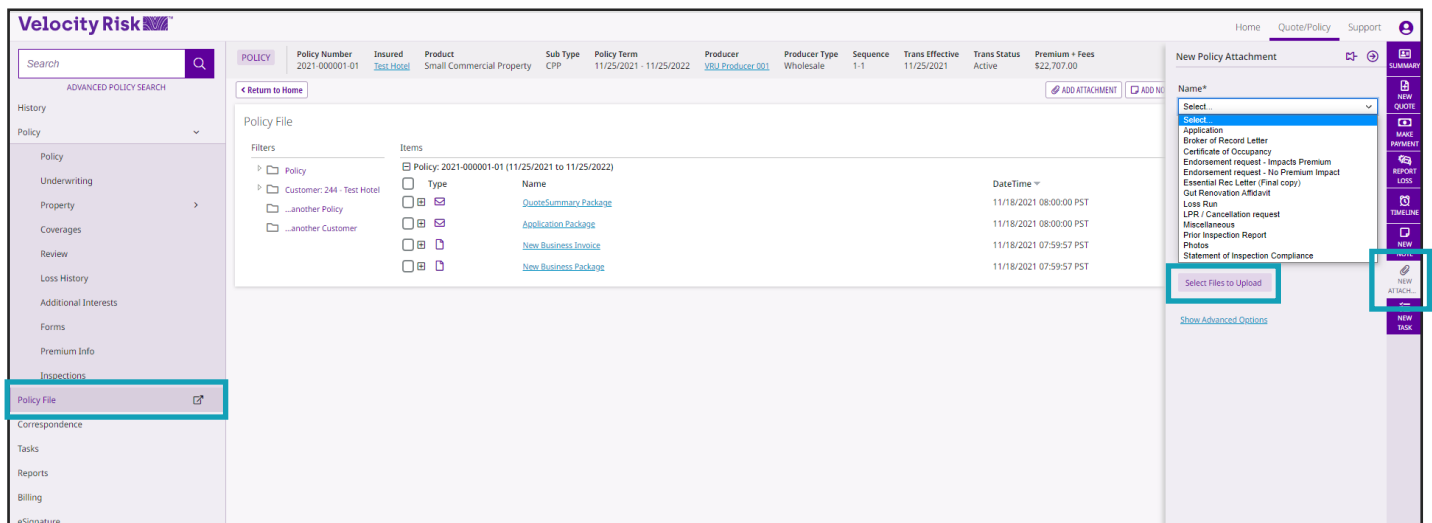
The **Search button** will permit you to search by policy, quote number, application, or customer name. To search by address click **Advanced Policy Search** and click the link in the Customer List.



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, and upload the document.



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.

Velocity Risk

Home Quote/Policy Support

Search

ADVANCED POLICY SEARCH

History

Policy

Underwriting

Property

Coverages

Review

Loss History

Additional Interests

Forms

Premium Info

Policy File

Correspondence

Tasks

Reports

Billing

ACCOUNT Summary

Policy Number: 2022-00004-01 | Insured: Home-Industry-Comerica | Product: Small Commercial Property | Sub Type: CPP | Policy Term: 04/29/2022 - 04/29/2023 | Producer: V&R-0001-02 | Producer Type: Retail | Sequence: 1-1 | Trans Effective: 04/29/2022 | Trans Status: Active | Premium + Fees: \$16,100.75

Item is Direct Bill With No Balance

Status: Insured | Payment Plan: Direct Bill Pay In Full | Change Pay Plan

Bill To: No Balance Due | Current Due: \$0.00 | Next Action: Installment on 04/17/2022

Equity Date: 04/29/2022

Billing Summary

Total Premium	Total Fees	Premium Billed	Fees Billed	Premium Adjustments	Fees Adjustments	Premium Paid	Fees Paid
\$14,820.00	\$25.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Unbilled Schedule

#	Bill Date	Due Date	Status	Premium	Bill Amount
01	04/17/2022	05/17/2022	Unbilled	\$14,820.00	\$16,100.75

Invoice Summary

Invoice Date	Due Date	Amount Due	Payoff Amount	Type
04/17/2022	05/17/2022	\$16,100.75	\$16,100.75	Direct Bill

Transaction History

#	Transaction Date	Effective Date	Description	Premium	Fee	Transaction Amt	Due Amt	Payoff Amt
00001	04/17/2022	04/29/2022	Create Account	\$14,820.00	\$1,280.75	\$0.00	\$0.00	\$16,100.75

Make a Payment

Policy Number: 2021-00001

Pay Clear

SUMMARY

NEW QUOTE

MAKE PAYMENT

REPORT LOSS

TIMELINE

NEW NOTE

NEW ATTACH...

NEW TASK

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

Velocity Risk

Home Quote/Policy Support

Search

ADVANCED POLICY SEARCH

Account Payment

ACCOUNT Summary

Account Number: 2021-00001-01 | Insured: Test Hotel | Policy Term: 11/25/2021 - 11/25/2022 | Account Status: Normal | Pay Plan: Agent Bill Full Pay | Current Due: \$17,678.30 | Total Due: \$17,678.30

Return to Policy

Make Payment

Account: Last used | Delete

New ACH
 ACH Trust Account
 New Credit Card

Amount* [input type="text"]

Credit Card Number* [input type="text"]

Enter Credit Card Details

Pending/Scheduled Payments

Account Number	Date	Source	Amount	Pay By	Type	Status	Check Number
Empty List							

Policy Changes and Endorsements

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

Velocity Risk

Home Quote/Policy Support

Search

ADVANCED POLICY SEARCH

History

Policy

Underwriting

Property

Coverages

Review

Loss History

Additional Interests

Forms

Premium Info

Inspections

POLICY Summary

Policy Number: 2021-00001-01 | Insured: Test Hotel | Product: Small Commercial Property | Sub Type: CPP | Policy Term: 11/25/2021 - 11/25/2022 | Producer: V&R-Producer-001 | Producer Type: Wholesale | Sequence: 1-1 | Trans Effective: 11/25/2021 | Trans Status: Active | Premium + Fees: \$22,707.00

Return to Home

Endorse VIEW NOTES MORE

Policy General

Product*: Florida - Small Commercial Property - Velocity Risk Underwriters, LLC

Effective Date*: 11/25/2021

Producer Code*: VRUP001 VRU Producer 001 | Branch

Policy Source*: New Business Application

Controlling State: Florida

Policy Disposition: None

Description: Small Commercial Property

Comments: [input type="text"]

Surplus Line Details

Surplus Line Producer*: VRU Producer 001-4567891 | License Number: 11111111111

License Type: Non-Residence | License Name: Sean's Surplus Lines Producer

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**.

Item	Amount	Item	Amount
Prior Full Term Premium	\$22,357.00	New Full Term Premium	\$21,004.00
Transaction Written Premium	\$1,353.00	Transaction Written Commission	\$0.00
Total Transaction Premium	\$1,353.00		

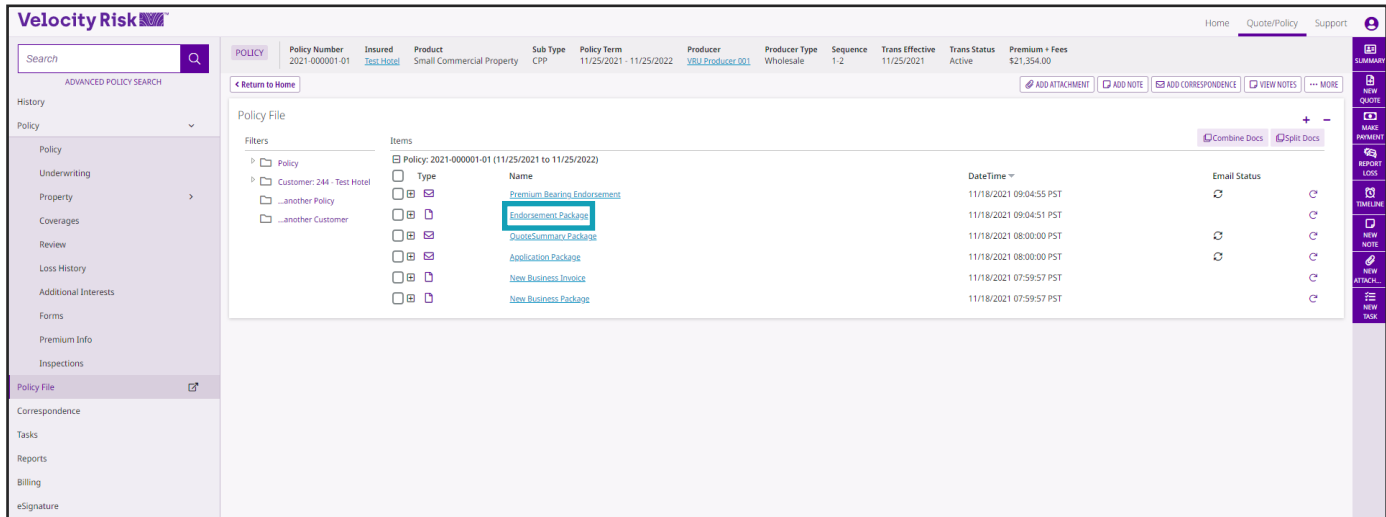
The Closeout section will display the premium adjustment if applicable. Click **Endorse Policy** to finalize the transaction.

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
agent.ust	Quote	11/18/2021		moratorium demo	Small Commercial Property	2021-000001-01

Endorsements continued...

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



The screenshot displays the Velocity Risk software interface. At the top, there is a navigation bar with 'Home', 'Quote/Policy', and 'Support' links. Below this is a search bar and a 'POLICY' header. The main area shows a table of documents in the 'Policy File' section. The table has columns for 'Type', 'Name', 'DateTime', and 'Email Status'. The 'Endorsement Package' document is highlighted with a red box. The table also includes a 'Filters' section on the left and a 'Combine Docs' / 'Split Docs' button on the right.

Type	Name	DateTime	Email Status
	Premium Bearing Endorsements	11/18/2021 09:04:55 PST	
	Endorsement Package	11/18/2021 09:04:51 PST	
	Quote Summary Package	11/18/2021 08:00:00 PST	
	Application Package	11/18/2021 08:00:00 PST	
	New Business Invoice	11/18/2021 07:59:57 PST	
	New Business Package	11/18/2021 07:59:57 PST	

Cancellations

Requests to cancel a policy must be submitted to our team by emailing at smb.underwriting@velocityrisk.com. A signed LPR and any additional needed documentation is required.

Underwriting Communications

Questions to underwriting may be submitted by emailing our team at smb.underwriting@velocityrisk.com.

