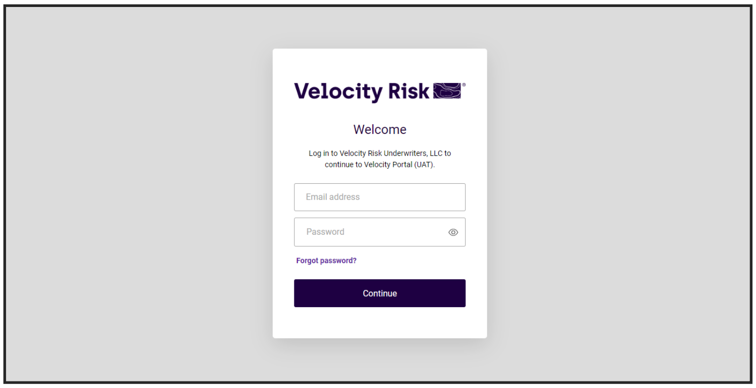
Servicing Guide
Small Commercial - Wholesale

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.



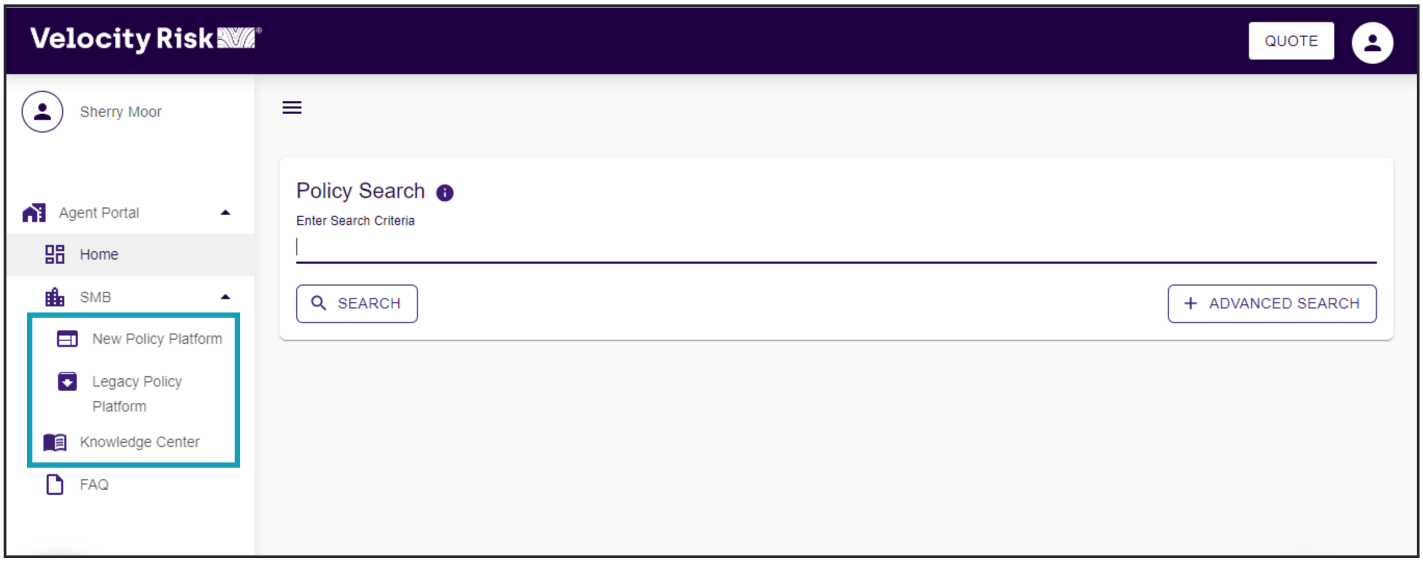
Portal Dashboard

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

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

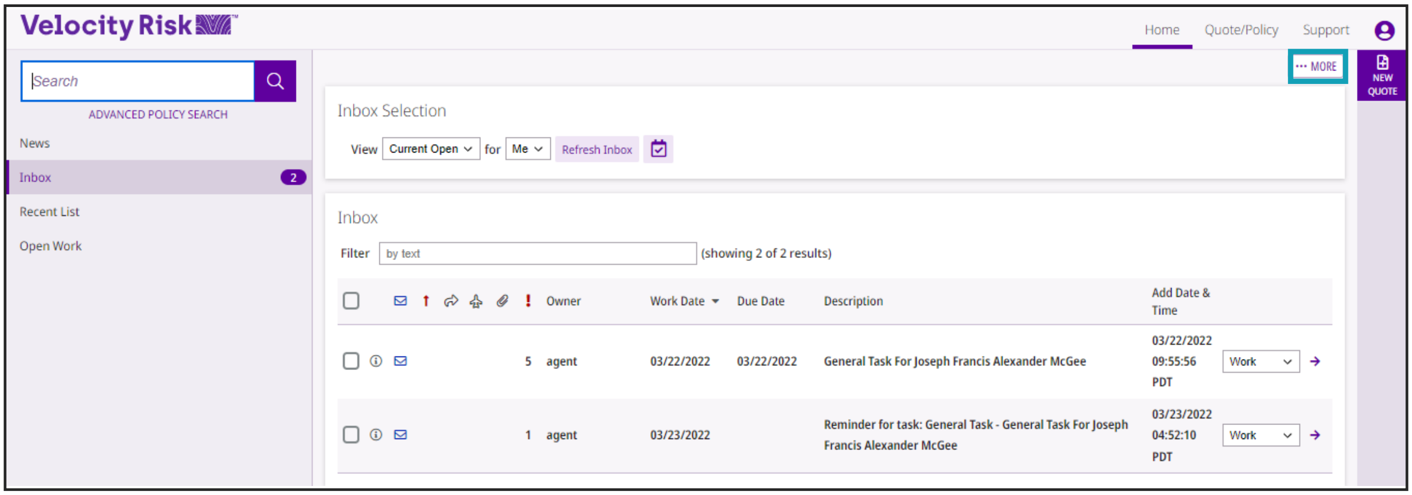
The **New Policy Platform** is our new system where all new quotes and policies will be generated. You will have access to service your new policies in this platform.

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

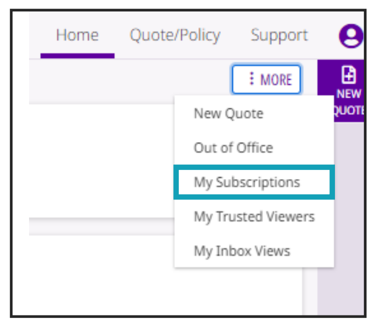
Our new policy system manages notifications and tasks in the Inbox. Tasks in bold indicate new tasks that have not been viewed. The Recent List tab displayes recently viewed policies and quotes. The Open Work tab list tasks that are currently open and active.



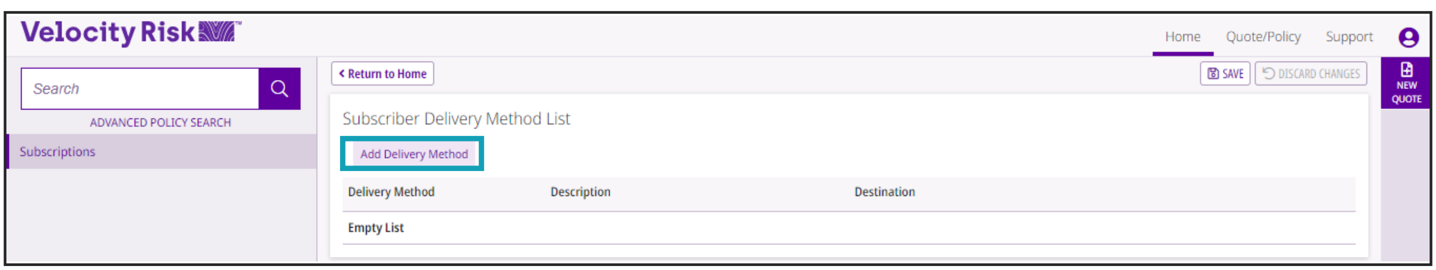
Inbox Subscriptions

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

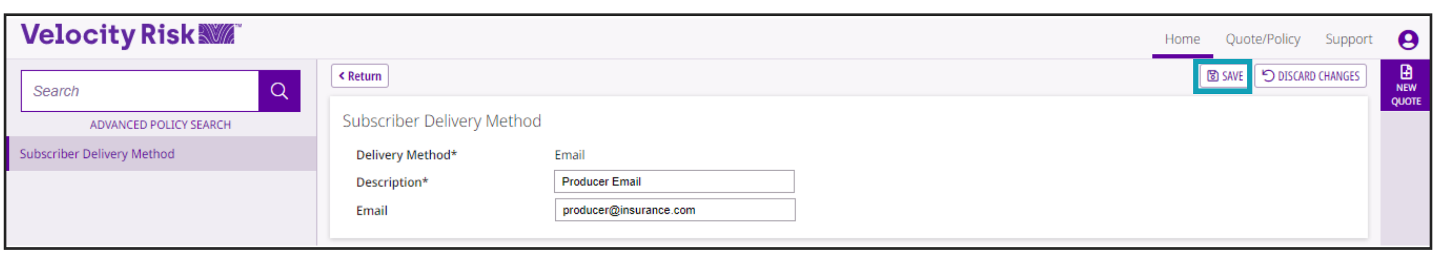
Select **My Subscriptions** from the More menu.



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

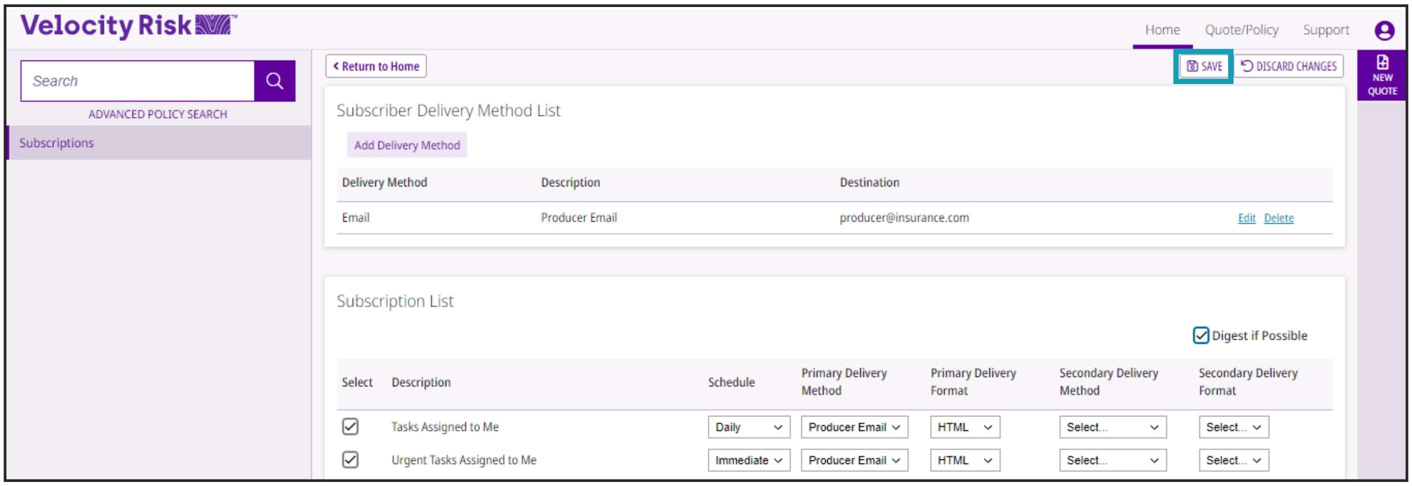


Choose the Email delivery method, enter a description, email, and **Save**. You can set up as many email delivery methods as needed.



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.

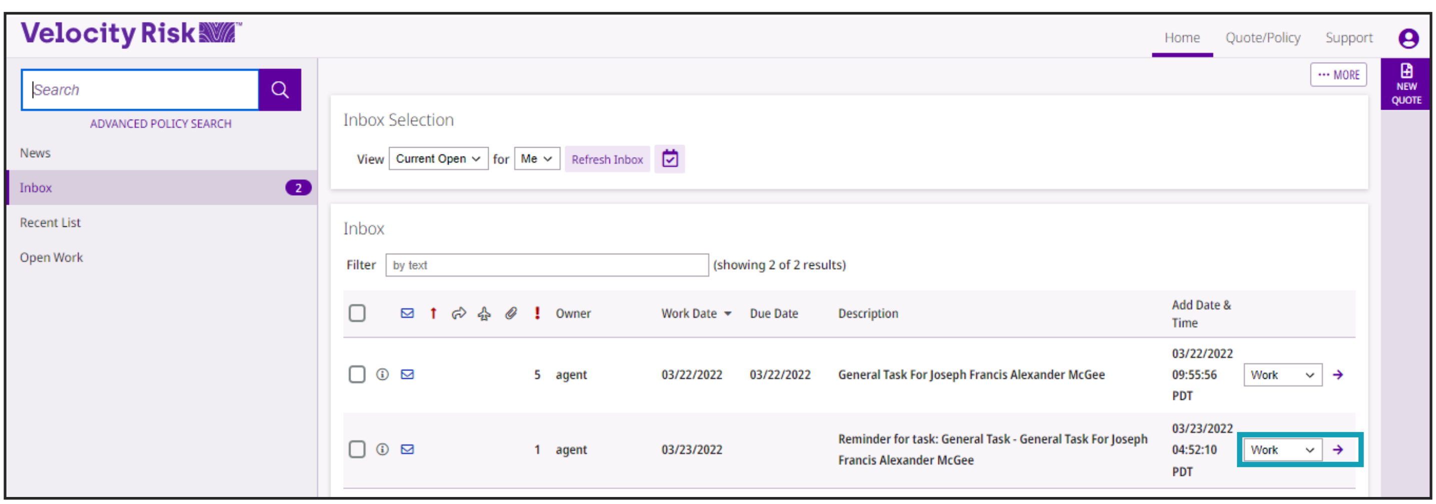


Tasks will now be sent to the indicated email from noreply@velocityrisk.com. Be sure to add this email to your safe sender list.

Working a Task

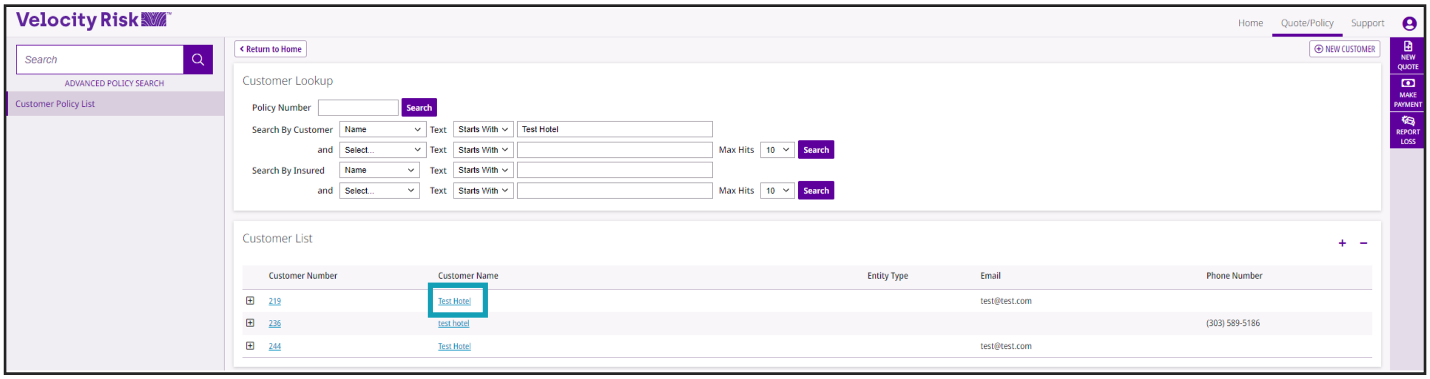
To work a task from the inbox, click the right arrow → on the far-right side of the task. The option in the drop-down field will default to **Work**. Options in the drop-down list are:

- **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



Policy Look up

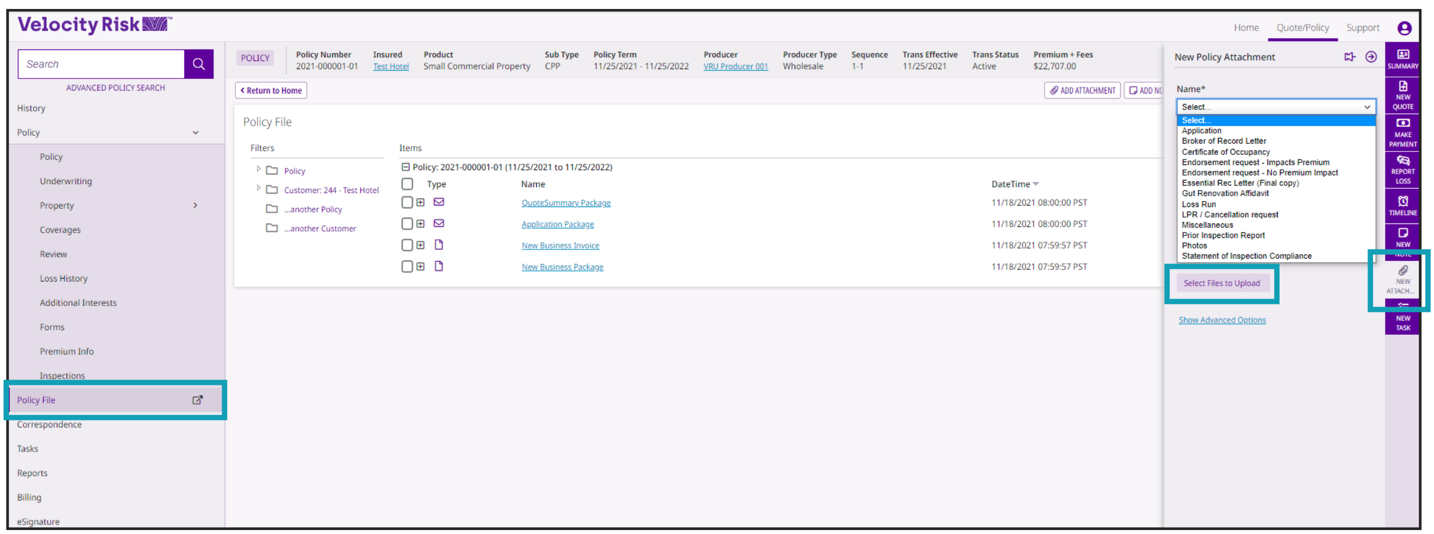
The **Search button** will permit you to search by policy, quote number, application, or customer name. To search by address click **Advanced Policy Search** and click the link in the Customer List.



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 Attatchment** button, select the documentation type, browse the file, and upload the document.

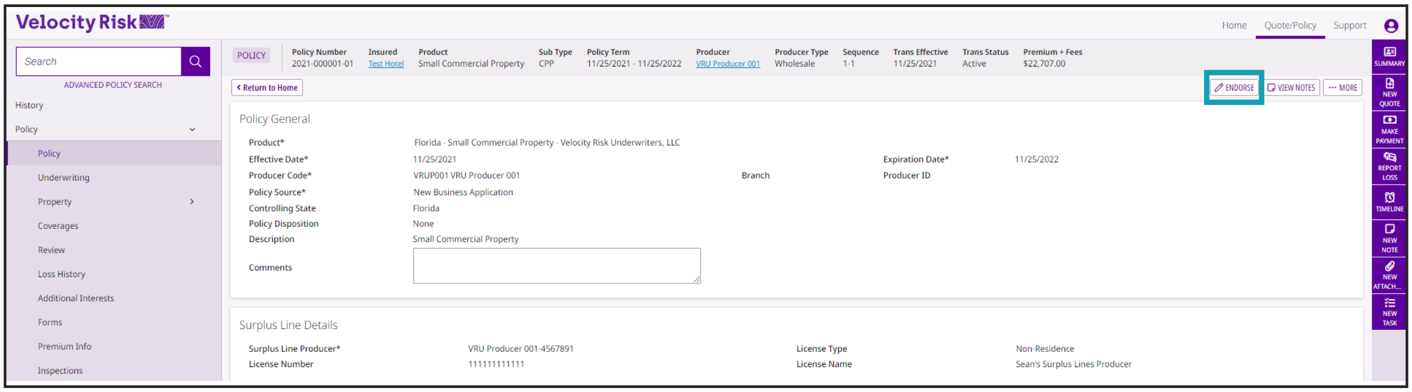


Billing and Payments

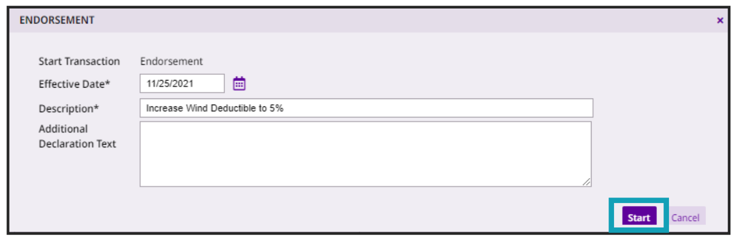
All policies are paid in full on an agency billed basis. The Brokerage will be sent a monthly statement for payment due less commission. Commission reports will be emailed to the email provided by the 30th of the month for the prior month production.

Policy Changes and Endorsements

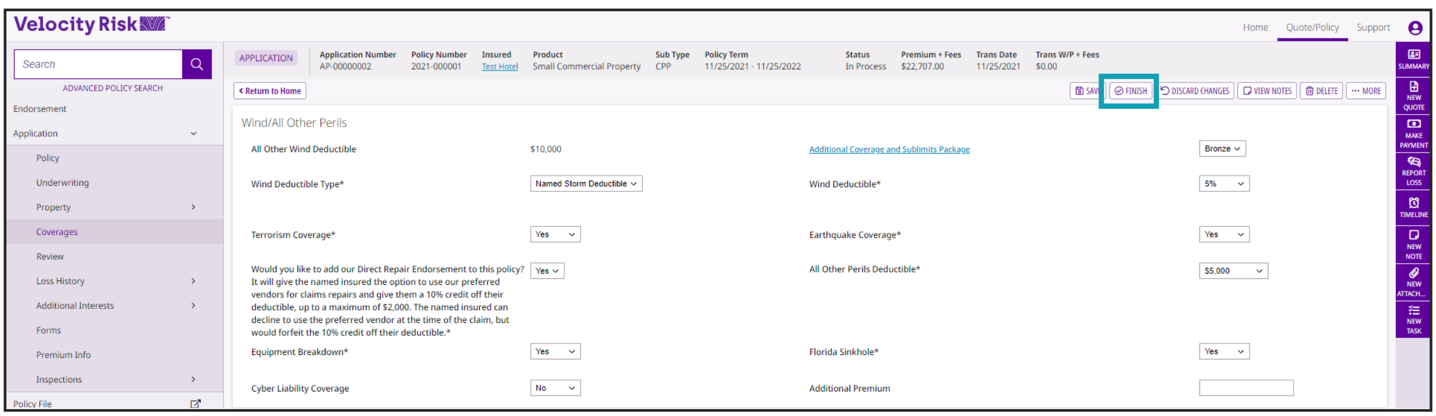
Policy changes can be processed by clicking the **Endorse** button.



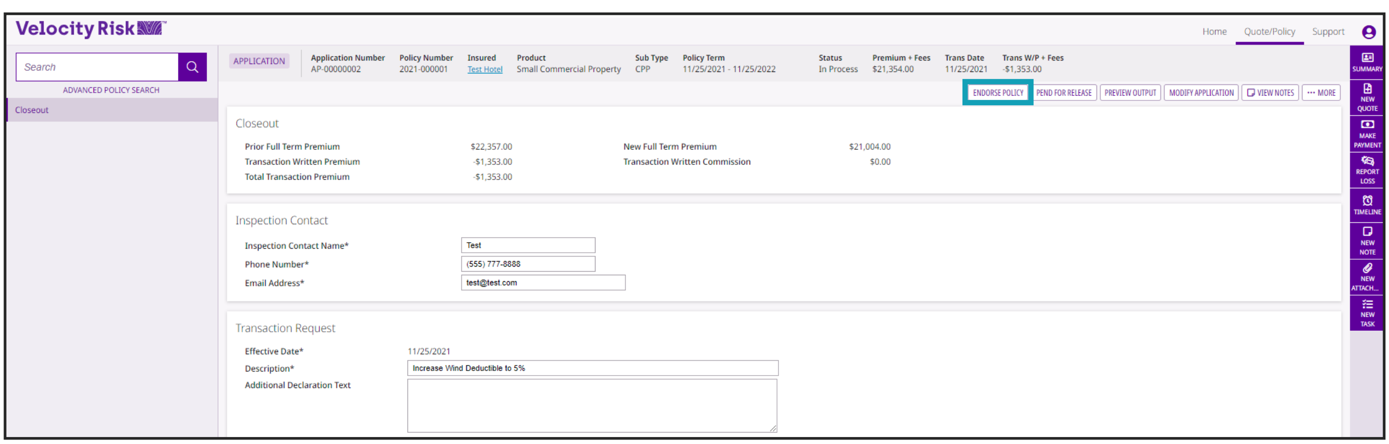
Select the effective date of the endorsement provide a brief description and click **Start**. The description will be displayed on the updated declarations page.



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

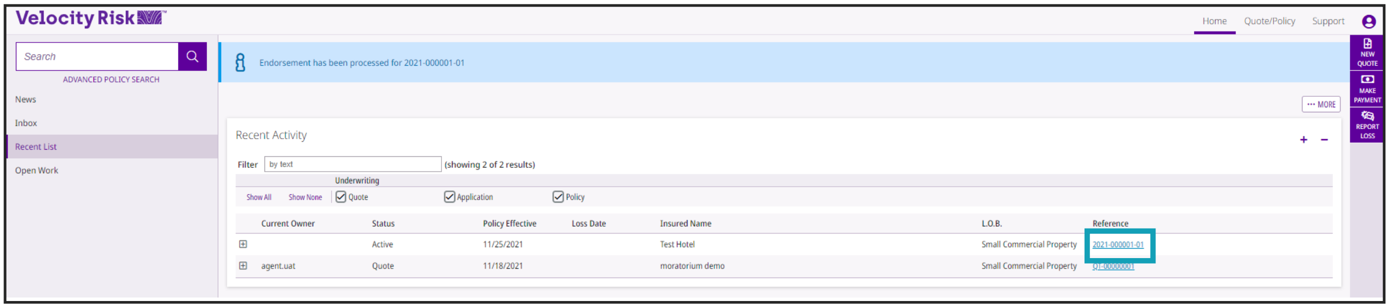


The Closeout section will display the premium adjustment if applicable. Click **Endorse Policy** to finalize the transaction.

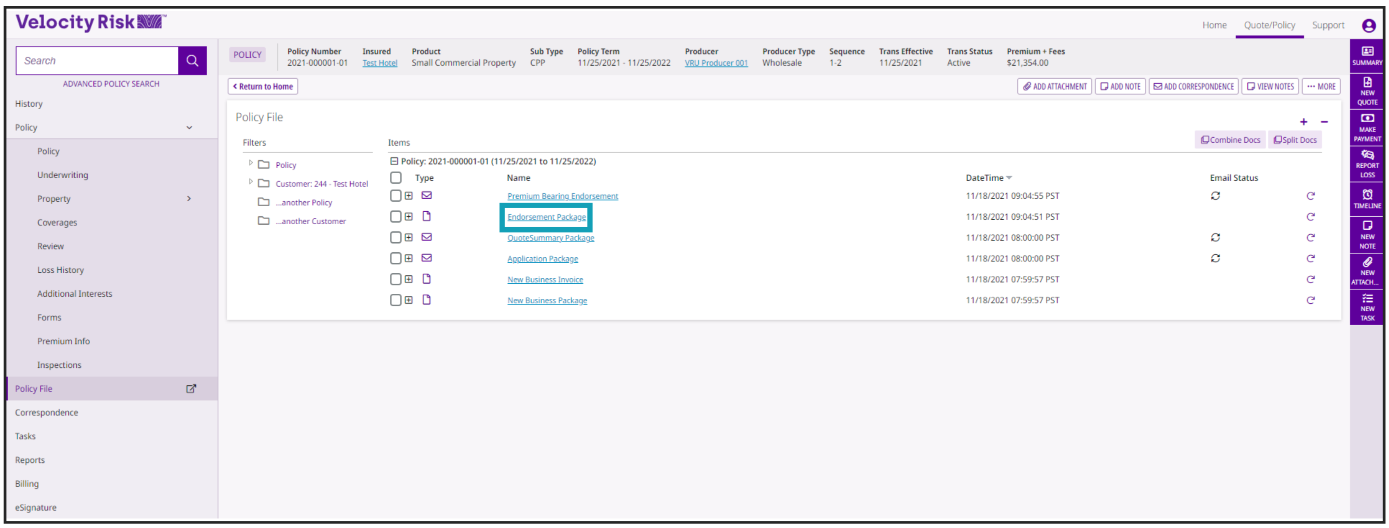


Endorsements continued...

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



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



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.