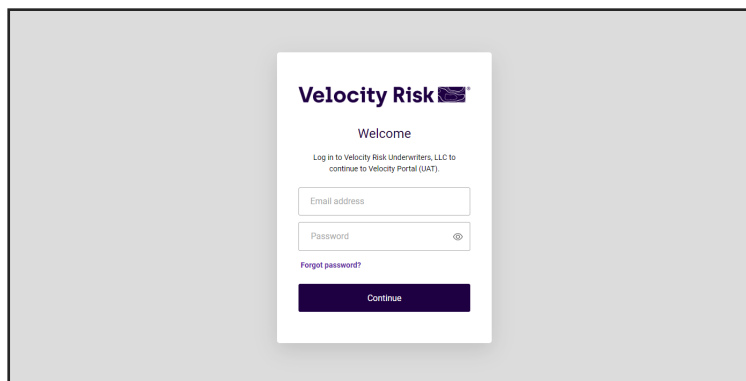


Velocity's policy platform puts the power to service policies back into your hands. Use this guide to learn about accessing the system, working tasks in the Inbox, setting up email subscriptions, looking up customers and policy documents, processing change requests and cancellations, and how to ask underwriting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

### Accessing the Portal

To begin, log into [my.velocityrisk.com](https://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](mailto:marketing@velocityrisk.com).



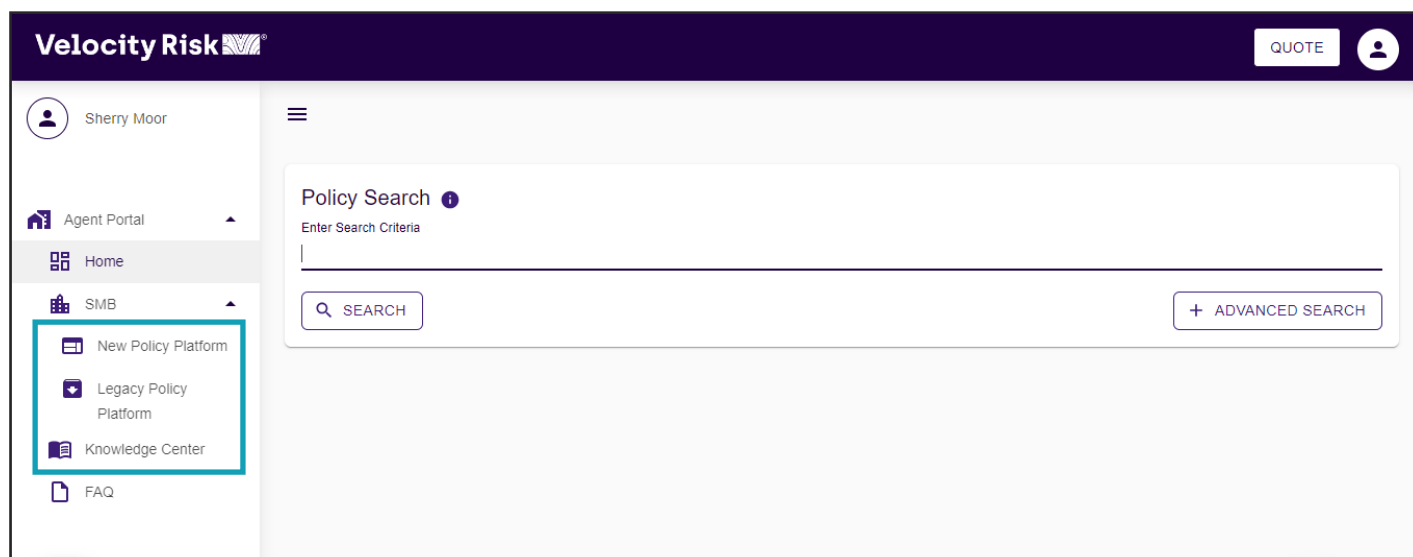
### Portal Dashboard

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 information.

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

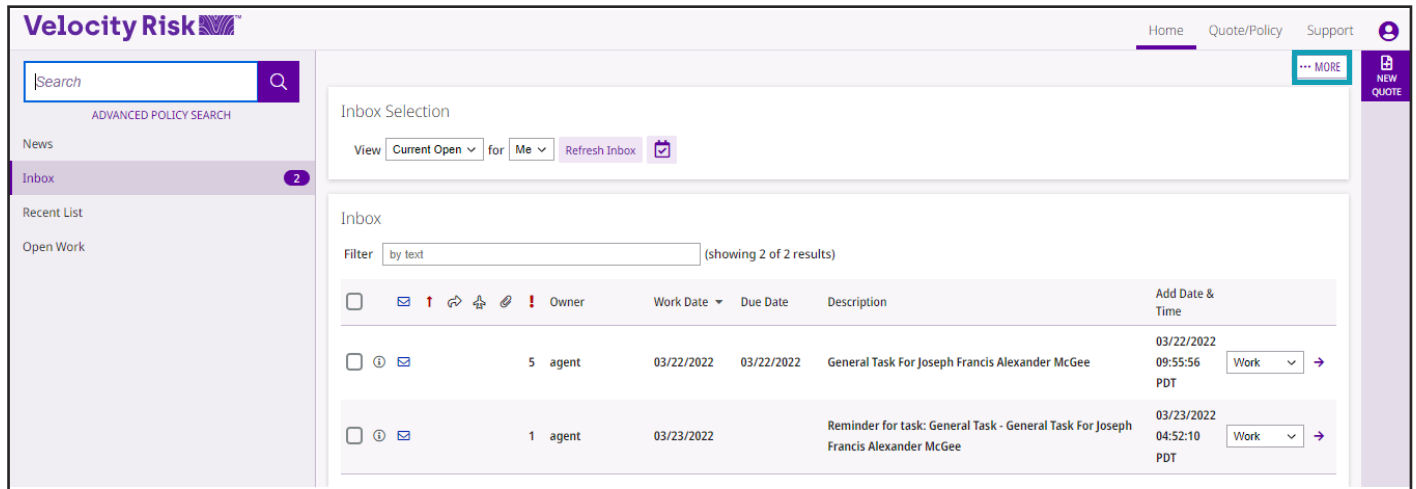
The **New Policy Platform** is our new system where all new quotes and policies will be generated. You will have access to service your new policies in this platform.

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.

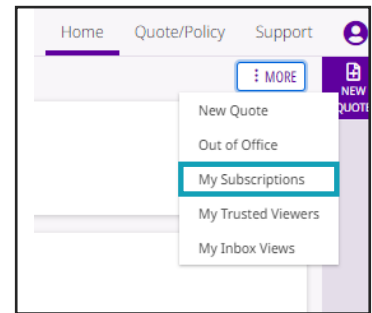


## Inbox Subscriptions

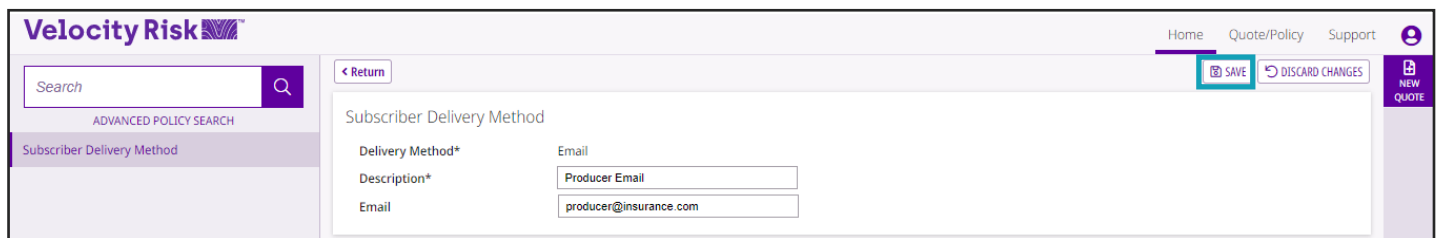
To receive Inbox notifications and Tasks to your email, set up a Subscription.

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](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

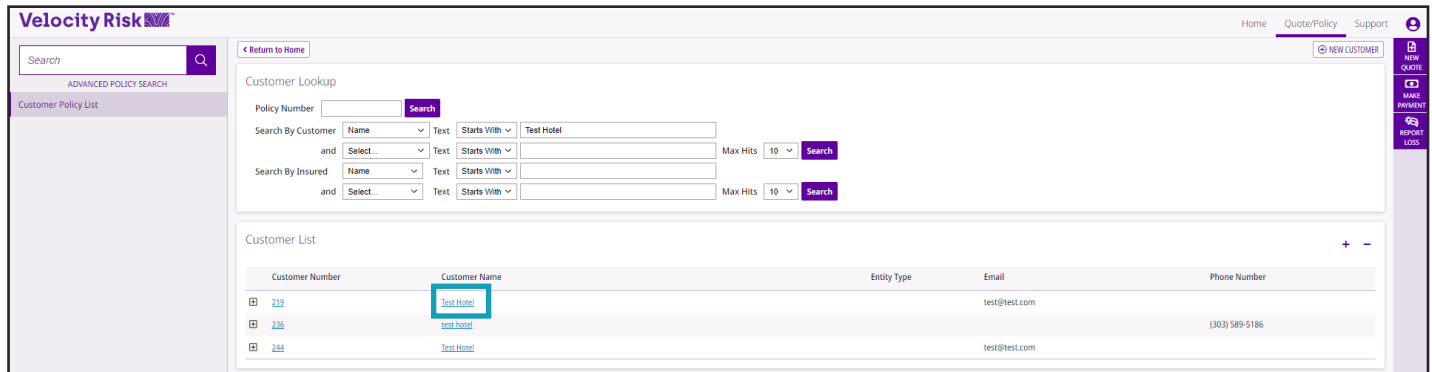
The screenshot shows the Velocity Risk interface for the 'Inbox Selection' and 'Inbox' sections. The 'Inbox Selection' section has filters for 'View' (Current Open), 'for' (Me), and 'Refresh Inbox'. The 'Inbox' section shows a list of tasks with columns for Filter, Owner, Work Date, Due Date, Description, and Add Date & Time. Two tasks are visible:

Filter	Owner	Work Date	Due Date	Description	Add Date & Time
by text	5 agent	03/22/2022	03/22/2022	General Task For Joseph Francis Alexander McGee	03/22/2022 09:55:56 PDT
by text	1 agent	03/23/2022		Reminder for task: General Task - General Task For Joseph Francis Alexander McGee	03/23/2022 04:52:10 PDT

The 'Work' button and right arrow on the second task are highlighted with a red box.

## Policy Look up

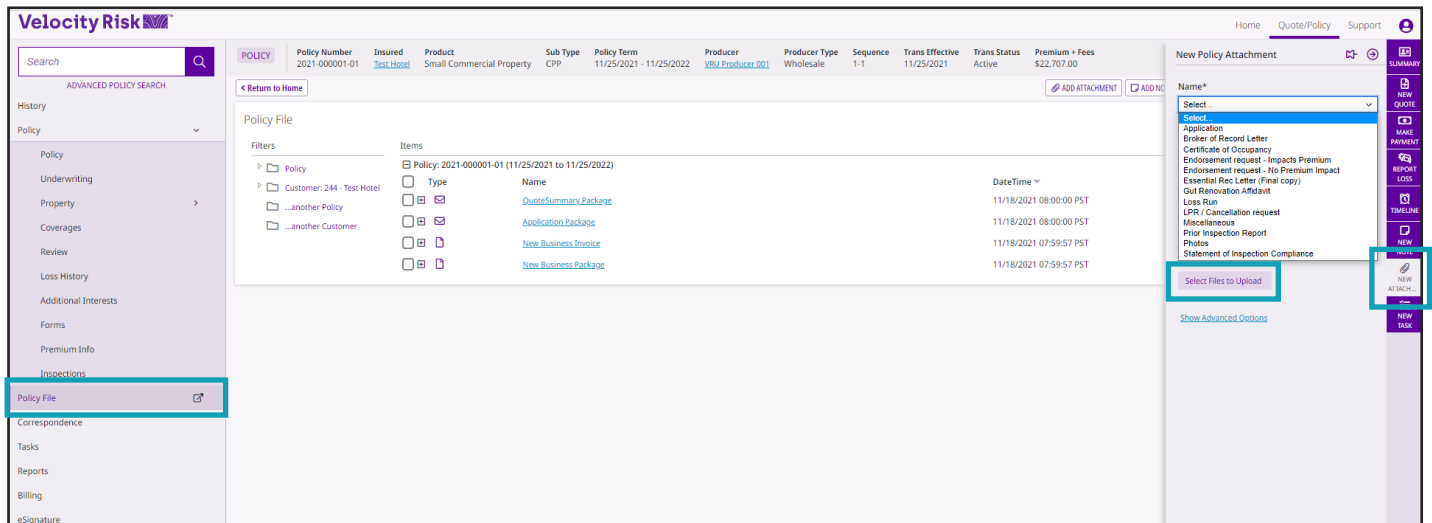
The **Search button** will permit you to search by policy, quote number, application, or customer name. To search by address click **Advanced Policy Search** and click the link in the Customer List.



## 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.



## 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.

The screenshot shows the 'POLICY' tab in the Velocity Risk application. The 'Endorse' button is highlighted in a red box. The page displays policy details such as Product, Effective Date, and Producer.

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

The screenshot shows the 'ENDORSEMENT' dialog box. The 'Effective Date' is set to 11/25/2021 and the 'Description' is 'Increase Wind Deductible to 5%'. The 'Start' button is highlighted in a red box.

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

The screenshot shows the 'APPLICATION' tab in the Velocity Risk application. The 'Finish' button is highlighted in a red box. The page displays application details and coverage options.

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

The screenshot shows the 'Closeout' section in the Velocity Risk application. The 'Endorse Policy' button is highlighted in a red box. The page displays closeout details and inspection contact information.

## Endorsements continued...

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

The screenshot shows the Velocity Risk interface. At the top, a notification states "Endorsement has been processed for 2021-000001-01". Below this, the "Recent Activity" section is visible, filtered by text. A table lists activity items with columns for Current Owner, Status, Policy Effective, Loss Date, Insured Name, L.O.B., and Reference. The Reference column for the second row contains a link to "2021-000001-01".

Current Owner	Status	Policy Effective	Loss Date	Insured Name	L.O.B.	Reference
	Active	11/25/2021		Test Hotel	Small Commercial Property	<a href="#">2021-000001-01</a>
agent.Luat	Quote	11/18/2021		moratorium demo	Small Commercial Property	<a href="#">2021-000001-01</a>

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

The screenshot shows the Velocity Risk interface with the "Policy File" section selected. The "Policy File" section displays a list of items for Policy: 2021-000001-01 (11/25/2021 to 11/25/2022). The items listed include Premium Bearing Endorsement, Endorsement Package, Quote Summary Package, Application Package, New Business Invoice, and New Business Package. The "Endorsement Package" item is highlighted with a red box.

Type	Name	DateTime	Email Status
<input type="checkbox"/>	<a href="#">Premium Bearing Endorsement</a>	11/18/2021 09:04:55 PST	<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Endorsement Package</a>	11/18/2021 09:04:51 PST	<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Quote Summary Package</a>	11/18/2021 08:00:00 PST	<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Application Package</a>	11/18/2021 08:00:00 PST	<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">New Business Invoice</a>	11/18/2021 07:59:57 PST	<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">New Business Package</a>	11/18/2021 07:59:57 PST	<input type="checkbox"/>

## Cancellations

Requests to cancel a policy must be submitted to our team by emailing at [smb.underwriting@velocityrisk.com](mailto: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](mailto:smb.underwriting@velocityrisk.com).