



Policy Issuance Process

Steps for Proceeding to Issuance

Step 1 - Risk Analysis Page

On the **Risk Analysis** page, check to see if there are any underwriting issues, and resolve any issues present. If there are no issues, click **QUOTE** to continue to the **Quote** page.

Risk Analysis [CLICK HERE TO LEARN MORE](#)

[< Back](#) [Next >](#) [Quote](#) [Quote\(Demo\)](#) [Save Draft](#) [Versions](#) [Close Options](#)

[Add UW Issue](#) [Request Approval](#)

UW Issues [Prior Policies](#) [Accidents/Violations](#) [Motor Vehicle Records](#)

No issues identified at this time.

[Approve](#) [Reject](#) [Reopen](#) [History](#) [View Issues Blocking](#) Me

Step 2 - Quote Page

Review your rating, then click **Next**.

Quote [CLICK HERE TO LEARN MORE](#)

[< Back](#) [Next >](#) [Edit Policy Transaction](#) [Save Draft](#) [Versions](#) [Bind Options](#) [Close Options](#) [Print Quote](#)

Submission Number	14236777
Policy Period	04/06/2015 - 04/06/2016
Primary Named Insured	Matt Howard
Address	62 East 6th St Cincinnati, OH 45202-2518
County	Hamilton
Address Type	Home
Address Description	
Underwriting Company	American Modern Property and Casualty Insurance Company
Policy Premium	Discounts Applied

Total Premium	\$226.00
Taxes & Surcharges	-
Total Cost	\$226.00

Step 3 - Verify Forms

On the **Forms** page, upload any needed forms and verify that all required forms are present.

Submission 14236777
Quoted

Qualification
Policy Contract
Policy Info
Drivers
Vehicles
Coverages
Risk Analysis
Policy Review
Quote
Forms
Payment & Signatures

< Back Edit Policy Transaction Versions Bind Options Close Options

Forms

Form #	Description	Endorsement...	Effective
CV-CW-C-0002	Appreciation Security Endorsement		04/06/2
CV-CW-C-0009	Milage Plan Endorsement		04/06/2
CV-CW-D-0001	Collector Vehicle Declarations		04/06/2
CV-CW-G-0006	Business Client Schedule		04/06/2
CV-CW-O-0001	Collector Vehicle Application		04/06/2
CV-CW-P-0001	Collector Vehicle Policy		04/06/2
CV-OH-A-0001	Amendment of Policy Provisions - Ohio		04/06/2
IL-CW-G-0001	Signature Endorsement		04/06/2
IL-CW-G-0004	MVR Notice		04/06/2
IL-CW-G-0005	CLUE Notice		04/06/2
IL-CW-G-0008	Declination Letter		04/06/2
IL-CW-N-0001	Privacy Notice and Notice of Information Practices		04/06/2
IL-CW-N-0002	Important Notice Billing Reference Information		04/06/2

Navigation icons: Home, Back, Forward, Close

Step 4 - Bind Options

Select **Proceed to Issuance** from the **Bind Options** drop-down menu.

Submission 14236777
Quoted

Qualification
Policy Contract
Policy Info
Drivers
Vehicles
Coverages
Risk Analysis
Policy Review
Quote
Forms
Payment & Signatures

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Forms

Proceed To Issuance
Issue Policy

Form #	Description	Endorsement...	Effective
CV-CW-C-0002	Appreciation Security Endorsement		04/06/2
CV-CW-C-0009	Milage Plan Endorsement		04/06/2
CV-CW-D-0001	Collector Vehicle Declarations		04/06/2
CV-CW-G-0006	Business Client Schedule		04/06/2
CV-CW-O-0001	Collector Vehicle Application		04/06/2
CV-CW-P-0001	Collector Vehicle Policy		04/06/2
CV-OH-A-0001	Amendment of Policy Provisions - Ohio		04/06/2
IL-CW-G-0001	Signature Endorsement		04/06/2
IL-CW-G-0004	MVR Notice		04/06/2
IL-CW-G-0005	CLUE Notice		04/06/2
IL-CW-G-0008	Declination Letter		04/06/2
IL-CW-N-0001	Privacy Notice and Notice of Information Practices		04/06/2
IL-CW-N-0002	Important Notice Billing Reference Information		04/06/2

Navigation icons: Home, Back, Forward, Close

Step 5 - Payment Page or Risk Analysis

When proceeding to issuance, you will see the Issuance Checklist. This will list any problems, so that you can resolve them before moving forward. From this page, there are two things that will happen:

1. If there are any underwriting issues you will be prompted with a notification in red. Navigate back to the **Risk Analysis** page to view and resolve any Underwriting problems. Then repeat steps 1 through 4 again.
2. If there are no issues, click on **Return to Payment & Signatures** to proceed to the **Billing** page.

- Submission 000000017
- Quoted
- Qualification
- Policy Contract
- Policy Info
- Drivers
- Vehicles
- Coverages
- CLUE Results
- Risk Analysis
- Policy Review
- Quote
- Forms
- Payment & Signatures

Issuance Checklist [Return to Payment & Signatures](#)

✔	Quoted and Rated
✔	All required info is entered
✔	Review the ordered reports (automatically)
✔	Check the Underwriting rules (automatically)
⚠	Review Payment info and Signatures
(Please review underwriting issue on the Risk Analysis page. Consult the Underwriting Guidelines or in some cases you may request approval. Once approved, please click "Quote" and "Proceed to Issuance" again.)	

Any problems are called out on the Issuance Checklist, so that you can resolve them before proceeding.

Step 6 - Billing Information

At this time, upload any needed documents, application, or UM/UIM forms.

Enter required billing information.

Payment

Premium Summary

Total Premium \$213.00
 Taxes and Fees -
 Total Cost \$213.00

Billing

Billing Type: Direct Bill
 Renew To: <none>
 Billing Method: Recurring Electronic
 Date of Payment: 10
 Billing Contact: Matt Howard

Available Payment Plans

Total cost could be significantly reduced if you choose to pay in full. You may do this by selecting "Yes" to "Paid in Full" on the Policy Info Page

Select	Name ↑	Down Payment	Installment	Remaining Installments	Installment Fee	Estimated Total
<input type="radio"/>	Pay in Full	\$213.00	-	0	\$1.00	\$213.00
<input checked="" type="radio"/>	2 Pay	\$106.50	\$106.50	1	\$1.00	\$214.00

Payment Schedule Estimator

Enter required billing information.

Select the payment plan and enter down payment information

Renew To: <none>
 Billing Method: Recurring Electronic
 Date of Payment: 10
 Billing Contact: Matt Howard

Available Payment Plans

Total cost could be significantly reduced if you choose to pay in full. You may do this by selecting "Yes"

Select	Name ↑	Down Payment	Installment	Remaining Installments	Installment Fee	Estimated Total
<input type="radio"/>	Pay in Full	\$213.00	-	0	\$1.00	\$213.00
<input checked="" type="radio"/>	2 Pay	\$106.50	\$106.50	1	\$1.00	\$214.00

Payment Schedule Estimator

Down Payment Information

Bill the Down: No
 Amount: \$ 106.50
 Payment Instrument: Discover (xxxx1117)

Recurring Electronic Payment Information

Using electronic same as Down Payment?

Select a Payment Plan.

Enter down payment information.

Click the arrow next to the **Payment Instrument** drop-down menu to select the Payment Instrument.

Total cost could be significantly reduced if you choose to pay in full. You may do this by selecting "Yes" to "Paid in Full" on the Policy Info Page.


Select	Name ↑	Down Payment	Installment	Remaining Installments	Installment Fee	Estimated Total
<input type="radio"/>	Pay in Full	\$213.00	-	0	\$1.00	\$213.00
<input checked="" type="radio"/>	2 Pay	\$106.50	\$106.50	1	\$1.00	\$214.00

Payment Schedule Estimator

Down Payment Information





Bill the Down No

Amount

Payment Instrument  **New**

Recurring Electronic Payment Information

Recurring electronic same as Down Payment?

Scroll down to select the signature type.

Note: If you use electronic signature, then consent is needed.

Recurring Electronic Payment Information

Recurring electronic same as Down Payment?

Required Signature Forms

Signatures on required forms can be obtained two ways 1) Emailed to Primary Named Insured for electronic signature 2) Printed for an in person signature below. How does electronic signature work?

Electronic Signature - Mobile Device Required

Consent to electronic delivery of required signature forms? Yes No





Primary Named Insured email address

Mobile phone number for text message delivery* of Personal Identification Number (PIN)

* Standard message and data rates apply

[View Privacy Notice](#)

Traditional Signature

Select **Issue Policy** from the **Bind Options** drop-down menu. Click **OK** to bind the submission.

Actions 

Submission 0000000015
Quoted

Qualification

Policy Contract

Policy info

Drivers

Vehicles

Coverages

CLUE Results

Risk Analysis

Policy Review

Quote

ms 

Payment & Signatures  [CLICK HERE TO LEARN MORE](#)

Proceed To Issuance

Issue Policy

Payment

Premium Summary

Total Premium

Taxes and Fees

Total Cost

Billing

Billing Type

Renew To

Billing Method

Date of Payment

Billing Contact

Are you sure you want to bind and issue this policy?
If applicant has provided Credit Card and/or EFT payment information, by selecting OK insurer is authorized to process payment.

OK **Cancel**

