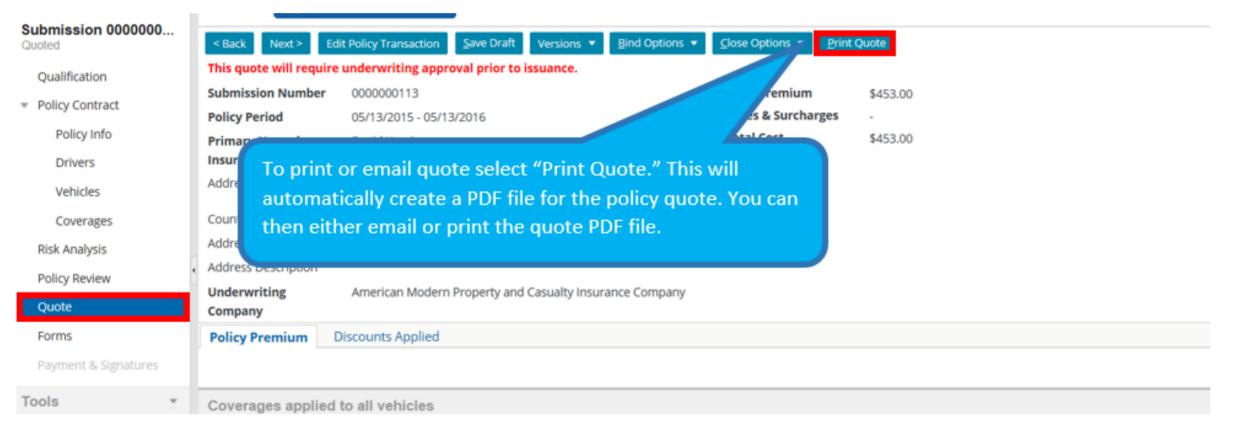## Reviewing Quote Page

1 How to Print and E-mail Quote

To either print or e-mail the quote, select **Print Quote** on the quote page. This will open the policy quote in a PDF file. You can then print the PDF file or attach it in an e-mail.
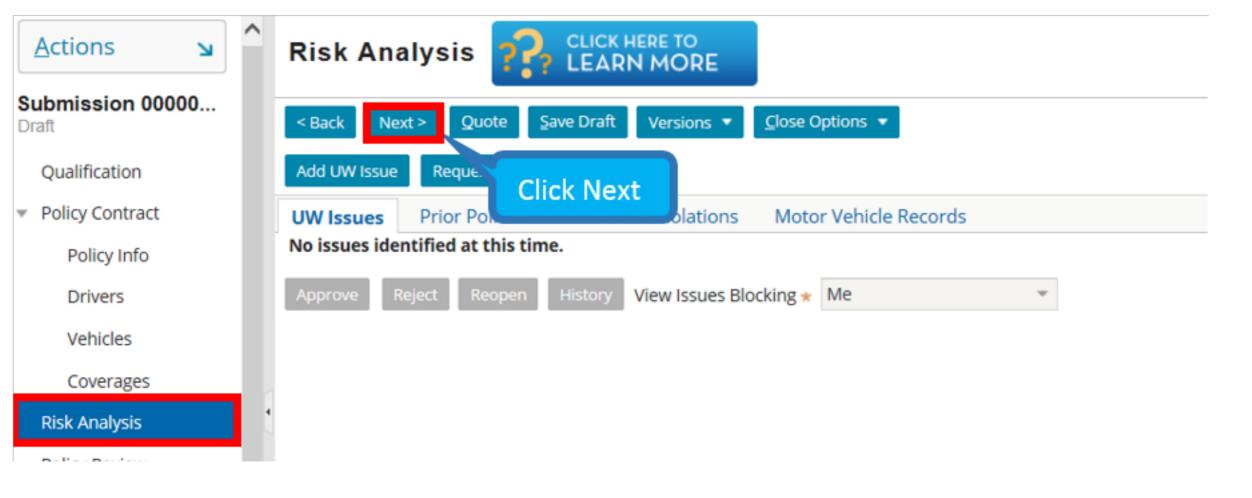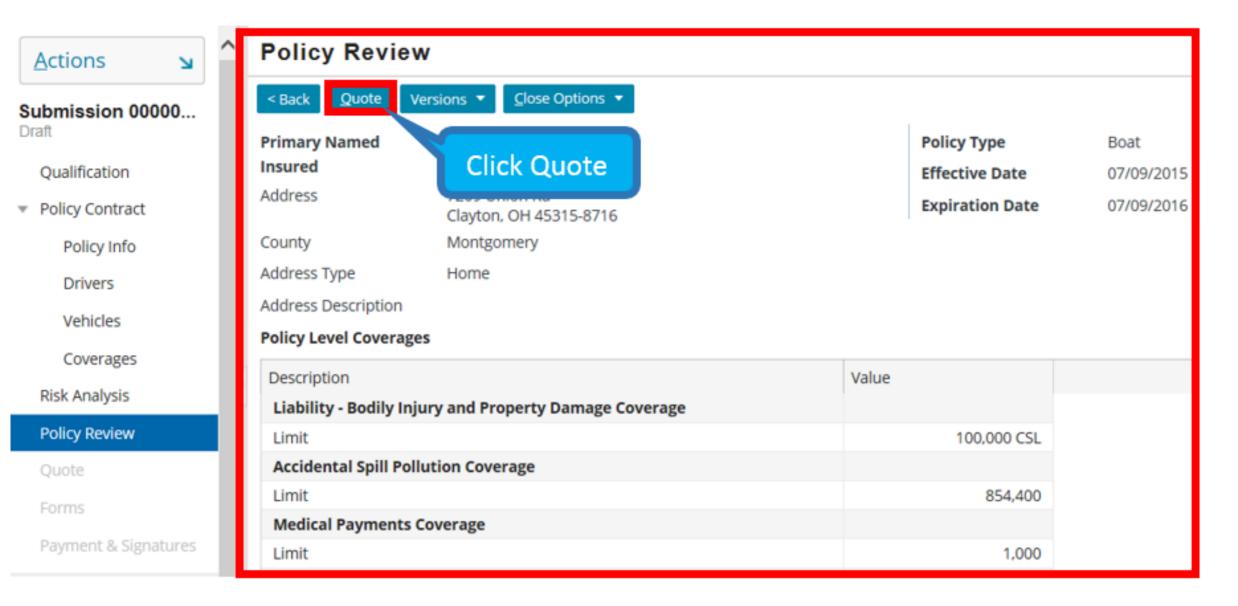

2 Steps for Proceeding to Issuance

Step 1 - Risk Analysis Page

On the **Risk Analysis** page check to see if there are any underwriting issues, resolve any issues present. If there are no issues click **NEXT** to continue to **Policy Review** page.

Step 2 - Policy Review Page

Review the policy information to confirm everything is correct. Then click **Quote** at the top of the page to continue to the **Quote** page.

Step 3 - Request Underwriting Approval

Note that if your quote does not require underwriting approval prior to issuance skip to step 4

To request underwriting approval navigate back to the **Risk Analysis** page and click **"Request Approval."** This will hand off your quote to underwriting and will allow you to resume, once they have approved.

Step 4 - Quote Page

Once you have reviewed the quote, click **Next** to continue to the **Forms** page.

Quote CLICK HERE TO LEARN MORE

< Back | Next > | Edit Policy Transaction | Save Draft | Versions ▼ | Bind Options ▼ | Close Options ▼ | Print Quote
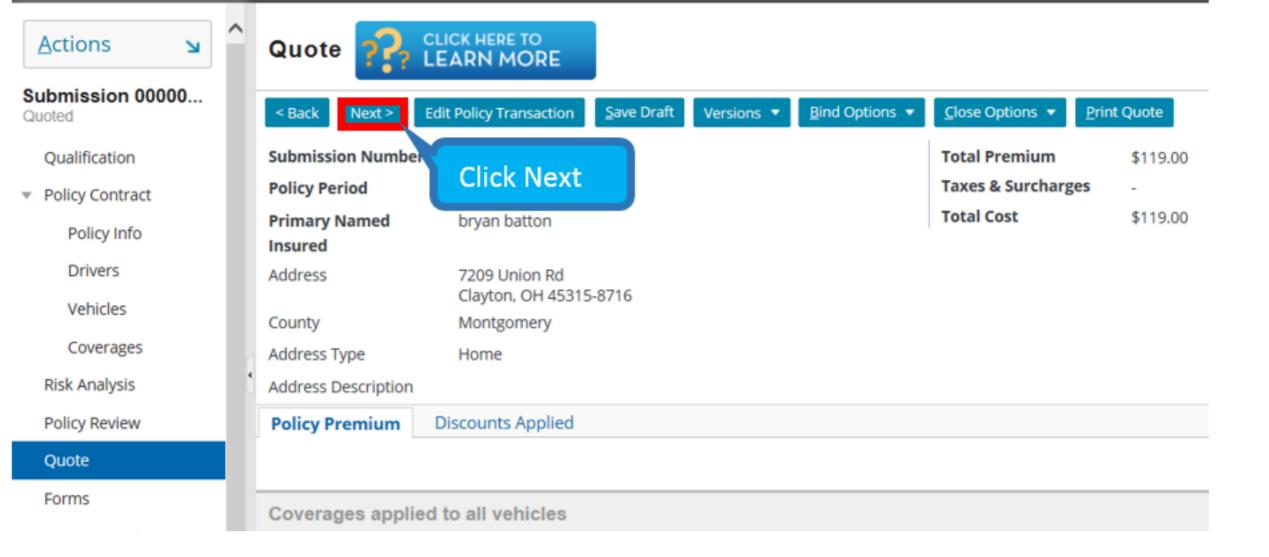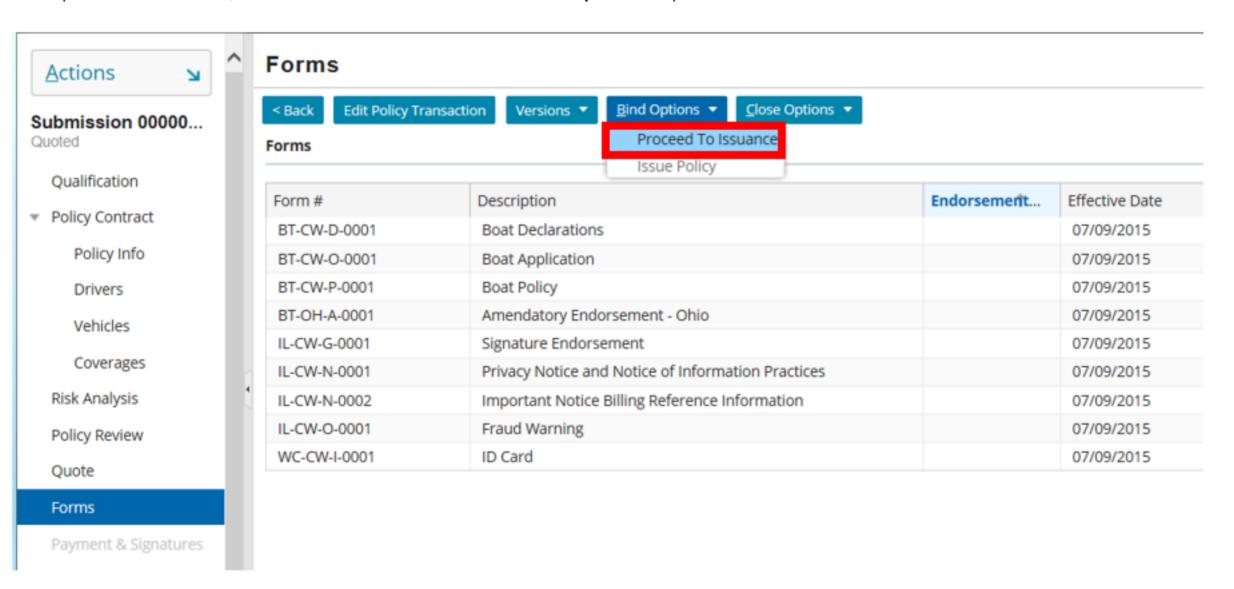
Actions ▼

Submission 00000...
Quoted

- Qualification
- ▼ Policy Contract
  - Policy Info
  - Drivers
  - Vehicles
  - Coverages
- Risk Analysis
- Policy Review
- Quote
- Forms

Submission Number
Click Next
Policy Period

Primary Named Insured   bryan batton

Address   7209 Union Rd
Clayton, OH 45315-8716

County   Montgomery

Address Type   Home

Address Description

Total Premium	$119.00
Taxes & Surcharges	-
Total Cost	$119.00

Policy Premium   Discounts Applied

Coverages applied to all vehicles

Step 5 - Forms Page

Confirm that all forms needed for the policy are present.

To proceed to issuance, click **Proceed To Issuance** in the **Bind Options** drop-down list.

Actions ▼

Submission 00000...
Quoted

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

Forms

< Back | Edit Policy Transaction | Versions ▼ | Bind Options ▼ | Close Options ▼

Forms

| | Proceed To Issuance |
| | Issue Policy |

Form #	Description	Endorsement...	Effective Date
BT-CW-D-0001	Boat Declarations		07/09/2015
BT-CW-O-0001	Boat Application		07/09/2015
BT-CW-P-0001	Boat Policy		07/09/2015
BT-OH-A-0001	Amendatory Endorsement - Ohio		07/09/2015
IL-CW-G-0001	Signature Endorsement		07/09/2015
IL-CW-N-0001	Privacy Notice and Notice of Information Practices		07/09/2015
IL-CW-N-0002	Important Notice Billing Reference Information		07/09/2015
IL-CW-O-0001	Fraud Warning		07/09/2015
WC-CW-I-0001	ID Card		07/09/2015

Step 6 - Payment Page or Risk Analysis

There are two things that will happen after you click **Proceed to Issuance**:

1. If there are no issues then you will automatically proceed to the **Payment** page.

2. If there are any Underwriting issues, you will be prompted with a notification on the **Issuance Checklist.** Navigate back to the **Risk Analysis** page to view and resolve any problems.

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 Guidlelines 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.