Recreational Quote & Issue: Basic Submission Process

for Motorsports

This document provides the steps to guide you to successfully create a quote and then issue a recreational policy for Motorsports.

- Create and Search for a New Account
- Create and Edit a Submission
- Complete the Issuance Process

Key Benefits

AMsuite is American Modern's state-of-the-art software solution. It consolidates the policy administration, claims and data applications into one platform for all Personal Lines products.

From motorcycles to manufactured homes, users will benefit from the same functionality, flow and flexible navigation. In a nut shell, AMsuite will make it easier for you to do what you do best—serve customers.

Create and Search for a New Account

Before you can create a quote, you'll need to set up an account. An account is a person or organization with the intention to obtain a quote or hold a policy with American Modern.

1 Click **Account.** Select **New Account**.

Use this menu to create a new account, or search for, or select an existing account. Another way to create a new account is to click **Actions** in the top left column of your screen, then click **New Account**.

2 Enter **First** and **Last Name**. Click **Search**.

If you are uncertain about the exact spelling of a first or last name, unclick "first name is an exact match" and "last name is an exact match," to increase search results.

3 If the search finds no other accounts for this customer, the **Create New Account** button appears at the bottom of the screen. Click **Create New Account.**

Select **Person** from the drop-down menu, and enter the customer's information in the fields. Fields with an asterisk must be completed to continue with new account creation.

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4 If the Primary Named Insured (PNI) is different from the person setting up the account, enter this name into the **Attention/Care of** field.

Enter address information.

5 Scroll to the bottom of the screen and enter the **Producer Code**. Click **Search**.

You can search for a producer or select a pre-generated producer code. Select the appropriate producer code. Click **Return to Create Account** at the top of the page to return to the **Create Account** page.

6 Click **Update** to save the new account. AMsuite Policy verifies the address. If the address is not verified, check with your customer to verify. You may select one of the addresses provided, or override and add the address as entered. Click **Return to Edit Account** to edit the address.

7 Confirm the account information from the Account File Summary page.

Create and Edit a Submission

8 The Sidebar provides quick links to contextual pages that change depending on the policy type and transaction you are performing. It also contains the Actions menu. The Actions menu gives you quick access to policy transaction steps.

To begin a submission, click Actions on the Sidebar menu, and select New Submission (Quote) from the drop down menu.

9 Select the **Default Rating State** and **Default Effective Date**.

Click **Select** to indicate the "Recreational'" **Product Type**.

10 Click the **Search** icon to select the "Motorsports" **Policy Type**. To help you make the appropriate selection, this page lists all vehicle types covered in the Recreational product line. Review the **Vehicle Type** column, before choosing a selection.

11 The **Qualification** page asks questions that, depending on your responses, will immediately let you know if a risk doesn't qualify for this policy type. However, eligibility will continue to be verified throughout the submission, so some things will come later, like looking at the applicant's driving history (MVR).

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The left-hand navigation shows all the pages that make up the submission process.

The first four questions ask the customer whether they grant American Modern permission to obtain qualification information for the purpose of issuing the policy. If the customer agrees, click the boxes to the right of each statement.

The prequalification questions appear below the disclaimers. You'll know right away if your applicant prequalifies. If your applicant does not meet prequalification criteria, an error message will appear on your screen.

12

The **Policy Info** page provides a high level summary of the customer's policy information. Review the policy information. Note that certain fields are marked with an asterisk, indicating that they are required. Review the required fields to ensure accuracy.

Select "Yes" or "No" to **Has the applicant moved in the last 60 days?.**

Click to **Order Prefill Report**. The prefill report provides driver information that you won't have to enter when adding a driver. When a prefill report is available, **Add Driver** will have an additional option to prefill the information.

13

Scroll to the bottom of the **Policy Info** page and answer "Eligible for multi-policy discount." Also, answer ""Will the applicant be paying in full for this policy?" Finally, answer "the question, "Does the applicant intend to enroll in paperless policy delivery?

14

Confirm whether the customer owns his primary residence and it is a house, not a condo, and select the **Applicant Primary Residence**.

15

Click **Add** to add drivers. If there is an option to add "From Prefill Report", select it. Otherwise, select **Existing Driver** for this applicant.

Review the information in the Drivers Details tab. Note any new required fields. AMsuite Policy was designed with efficiency in mind. You enter information as it becomes necessary to complete the transaction, rather than entering unnecessary information up front.

16

Click the **Driver Experience** tab to continue.

Note that each time you create a new submission on collector vehicle submission, you need to complete the required fields in the Driver Experience tab, before proceeding. Enter or select required information.

17

Add any additional drivers. Click **Add/ New Person**.

Enter required information for the additional driver, and click **OK**. Click the **Driver Experience** tab to continue. Enter required information and click **Next**.

18

To add a vehicle, click **New Vehicle** in the **Create Vehicle** drop-down menu. Enter required information.

Add/Select Usage. Click to **Order Territory Code**.

19

Photos are required to issue a Motorsports policy for a classic or custom motorcycle:
- Three photos showing the front/side, rear/side and a close up of the VIN are needed.

Click **Actions**/**New Document**/**Link** t**o an existing document**.

Click **Browse** for the attachment and select the photo to upload.

Choose **Photo**/**Documentation**/**Appraisal** from the **Type** drop-down menu.

Click **Update**.

20

Click **Next** to continue.

Select **Coverages, Personal Effects Limit** and **Settlement Option**.

Click **Next** to continue.

21

If there are "No issues identified at this time," click **Quote**.

22

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

On the Forms page, verify the correct forms are present.

23

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

If there any problems encountered with issuance, the **Issuance Checklist** will let you know where to go to resolve them.

Complete the Issuance Process

24

Enter required billing information. The system generates available payment plans. Select a payment option.

25

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

Select 'Yes' or 'No' to **Save for future use?**

Select **Payment Method**. Enter required information. If you are entering credit card information, the customer's address will prefill from the account. Verify that this is the correct billing address.

Click **Verify**.

26

Click **OK** at the top of the page to return to the **Payment & Signatures** page.
If the credit card information is not valid, an error displays at the top of the page.

27

Scroll down to select **Electronic Signature**, and to consent to **Electronic Signature**.

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

For questions about using AMsuite, contact American Modern's Customer Service Team @ 1-800-543-2644.