

Policies for existing Penalty-Free auto customers will automatically renew in our legacy system as usual. We recognize that our agency partners may be interested in quoting their existing customers in one of our new auto products, so we have prefilled pertinent client information from our legacy system into our new system.

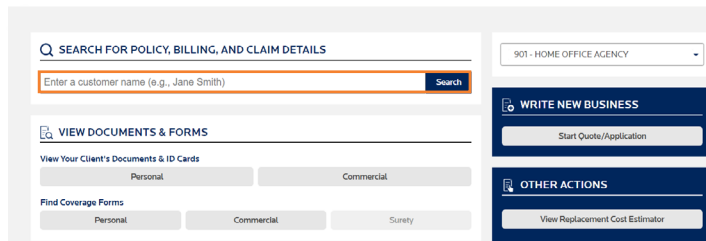
Each renewal will generate as usual in our legacy system prior to the effective date. There is a one-day lag between renewal processing in our legacy system and data prefilling the new system. After a day, this information will be available for your review to determine the best option for your customer based on eligibility.

### Quoting an existing auto customer in our new system:

From *AgentsOnline*, you can search for existing customers by name, or you can search all existing customers who are up for a renewal and select the pre-filled quote draft you would like to review.

Please note - information from our legacy system may be several years old and could be outdated. **Agents should review all data with the customer to ensure accuracy.** Additional information may be required to produce a quote.

## Search by Name



SEARCH FOR POLICY, BILLING, AND CLAIM DETAILS

901 - HOME OFFICE AGENCY

Enter a customer name (e.g., Jane Smith)

VIEW DOCUMENTS & FORMS

View Your Client's Documents & ID Cards

Personal Commercial

Find Coverage Forms

Personal Commercial Surety

WRITE NEW BUSINESS

Start Quote/Application

OTHER ACTIONS

View Replacement Cost Estimator



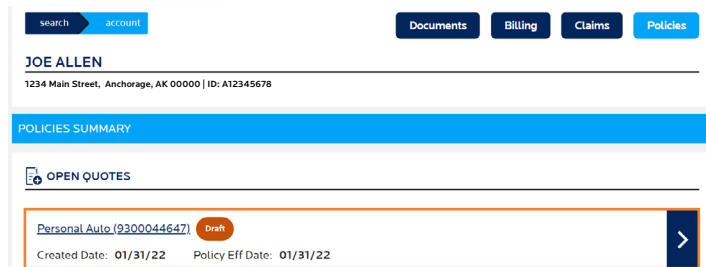
Policyholder:

Joe Allen

1 result

Joe Allen [A930038183](#)  
1234 Main Street, Anchorage, AK 00000

No more results



search account Documents Billing Claims Policies

JOE ALLEN  
1234 Main Street, Anchorage, AK 00000 | ID: A12345678

POLICIES SUMMARY

OPEN QUOTES

Personal Auto (9300044647) Draft

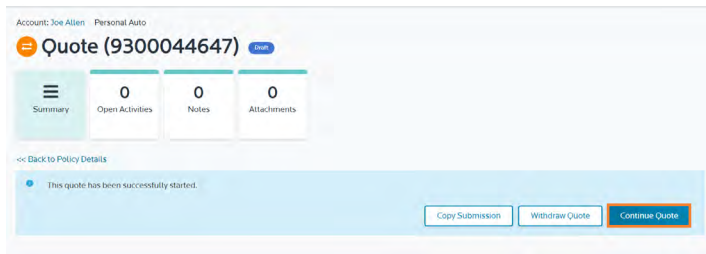
Created Date: 01/31/22 Policy Eff Date: 01/31/22

1. In the field “Search For Policy, Billing, and Claim Details”, enter the customer’s first and last name.

2. The results will show both the existing account and the new account that is automatically created the day after the existing quote is generated. The new account for our **Select Auto** and *Signature Auto* quote will start with the letter “A” and will display at the bottom of the screen.

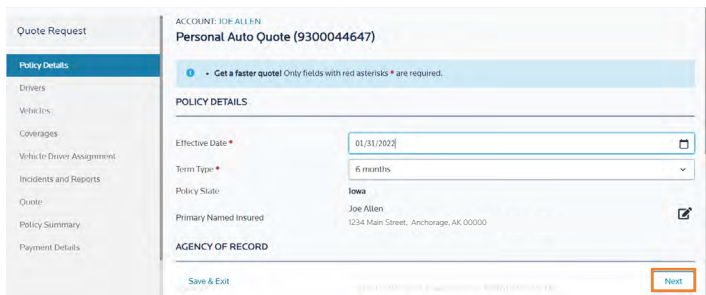
Choose the account number starting with the letter “A” to access the new quote for the customer.

3. Choose the Personal Auto policy number from the “Open Quotes” section. This quote is pulling information from the existing Personal Auto Policy.



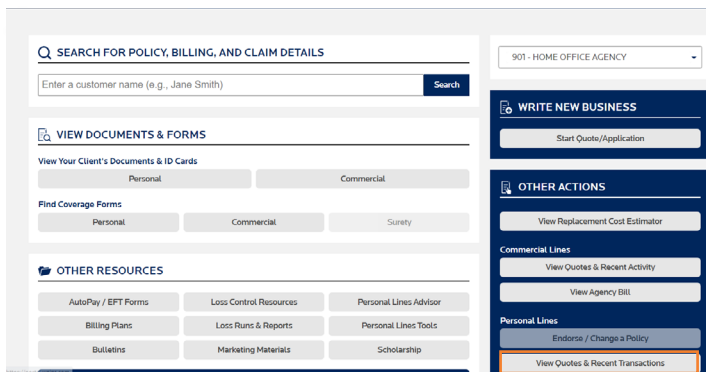
4. Click “Continue Quote” and review the information carefully to make sure any recent changes have been applied.

**Note:** The alert bar is a reminder that the information in the quote is based on the customer’s current Personal Auto Policy and to confirm that the information is correct and to enter the additional information needed to issue the quote.

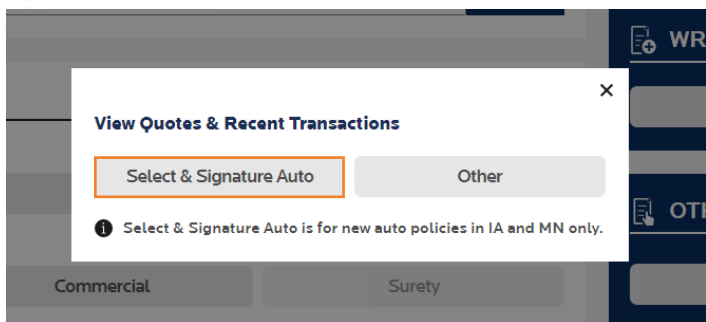


5. Select “Next” to move forward in the quote through each page. If additional information is needed, you will receive a message indicating the required information.

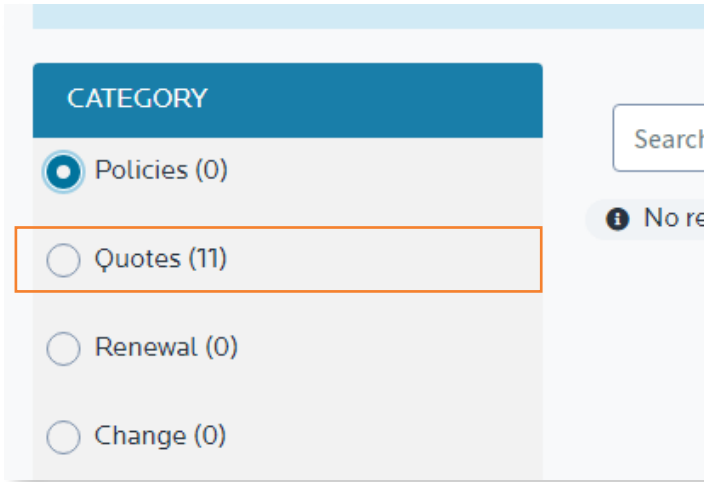
## Viewing all Customers up for Renewal



1. Another way to view your customers who are up for renewal is to select “View Quotes and Recent Transactions” in *AgentsOnline*. This will show new quotes for all customers who are scheduled for renewal.



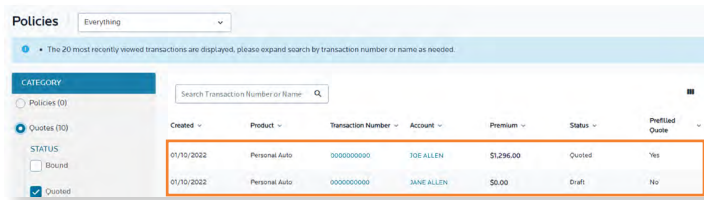
2. In the “View Quotes & Recent Transactions” pop up, choose “Select & Signature Auto”.



3. This will direct you to a new screen. On the left side of the screen under “Category”, select “Quotes”.

This will show all new quote offers in draft status which have been automatically created at the time of renewal. Select the Transaction Number to view the draft quote.

**Remember:** this quote is pulling information from the existing Personal Auto Policy and if changes have been made, they will need to be updated along with minimal additional information.



Once you select “Quotes”, use the Prefilled Quote indicator to help you determine the quote is for an existing customer.

## Additional Information Required for New Quote

AGENCY OF RECORD

Agency \* 000 - HOME OFFICE AGENCY - ANCHORAGE, AK

Licensed Producer \* Cyndi Wright

Servicing Producer

### Policy Details Page

Enter the Licensed Producer.

Primary Phone \* Home

Home Number \* -----

### Driver Page

Verify all information is accurate, including Home Number.

Annual Mileage \* 10000

Owner(s) (Select all that apply) Martha Smith x

### Vehicle Page

#### Owner of Vehicle

Verify or add the owner of the vehicle.

VEHICLE QUESTIONS

Is this vehicle driven to Work/School? \* Yes No

Is this vehicle used in a business, including driving in the course of employment, vehicle sharing for a fee, and/or carrying persons or property for a fee? \* Yes No

Is this vehicle used exclusively to service a farm owned by you? \* Yes No

Is there any existing damage to the vehicle (including damaged glass)? Yes No

Is the vehicle modified or does the vehicle have any special equipment? Yes No

#### Vehicle Questions

An answer for business use is required for each vehicle, as well as two underwriting questions on each vehicle.

▼ ADDITIONAL INTERESTS

+  
 Add Additional Interest

▼ GARAGED AT

Garaged At \*

Address Line 1 \*

Address Line 2

ZIP Code \*

County \*

City \*

State \*

Original address  1234 Main Street, Anchorage, AK 00000

Suggested address  1234 Main Street, Anchorage, AK 00000

Cancel

ASSIGN DRIVERS TO VEHICLES

Vehicle ▼	Primary Driver ▼	Occasional Driver ▼	
2007 ISUZU NPR 2142	Martha Smith	Sammy Smith	<input type="button" value="Edit"/>

INCIDENTS AND REPORTS

- ! Policy premium is calculated in part based on information obtained from consumer reports. Agents are required to inform customers that they will be requesting information from consumer reports as part of the quoting process.
- Please note that reports will not be ordered until issuance. For a more accurate quote, please enter all incident information from the last 5 years below:

▼ USER ENTERED INFORMATION

- > PRIOR LOSSES 0 RECORD
- > VIOLATION 0 RECORD
- > PRIOR CARRIER 0 RECORD

### Additional Interests

Review Additional Interests.

### Garaged At

Review by verifying that the address is valid and if a new address needs to be entered, click on the drop-down arrow and select “New”.

**Note:** It is important that you select “Save & Next Vehicle” or “Save & Close” to validate the address.

During validation it is possible an alternative address will be an option. Select the most appropriate address and select “Ok”.

### Vehicle Driver Assignment

Review driver assignments, and assign drivers when the number of drivers is greater than the number of vehicles.

### Incidents and Reports Page

#### Prior Losses

All losses paid by Umialik will be prefilled on the Incidents and Reports page. To ensure accurate quoting, you **must** add all losses occurring prior to policy inception if the customer has been insured with Umialik less than three years. You must confirm that all losses for the three years preceding the new policy effective date are included.

### Add Prior Loss Entry

Driver \*

Category \*

Description \*

Incident Date \*

Status \*

Amount Paid \*

VIOLATION 1 RECORD

[+ Add](#)

Driver Name	Incident Date	Description	Other Than	Surchargeable	Surcharge Applied	
Sammy Smith	Jan 1, 2021	Minor Violation	Yes	Yes		
		Speed				

> PRIOR CARRIER 0 RECORD

### Add MVR Entry

Driver Name \*

Incident Date \*

Description \*

PRIOR CARRIER 1 RECORD

Carrier	Cancelled/Expiration Date	Status	Time with Prior Carrier	
Progressive Insurance	Feb 24, 2022	In-Force	5 Years	

### Prior Violations

Violations on record with Umialik will be prefilled. **You must add all violations occurring in the preceding three years.** If a MVR was ordered for the existing renewal, a new MVR will not be ordered. All other policies, except those written in Minnesota, will have a new MVR run when you are ready to bind coverage.

### Prior Carrier

Your customer will receive a discount based on their number of years with Umialik and will not lose their Loyalty Discount.

### Policy Issuance

Review and update any changes needed for the customer's pay plan. If your customer wants to change how they pay, make the change in the quote. For example: the customer currently has a monthly payment and now wants the Full Pay Discount. Make this change in the quote. All applications will require a down payment.

One more reminder: if the customer chooses a **Select Auto** or *Signature Auto* policy, a **signed application must be sent to Umialik with a signed request to cancel the existing policy.**

Some coverages, conditions, and exclusions may have changed. Refer to the [Personal Lines Toolbox](#) for additional details.