



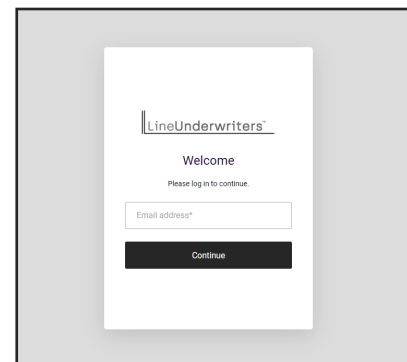
E&S Coastal Business Owners Policy Service Guide

LineUnderwriter'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, taking ownership of a policy or quote, policy documents, billing, processing change requests and cancellations, policy renewal process, and how to ask underwriting questions.

Accessing the Portal

To begin, log into my.lineunderwriters.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 coastline.support@lineunderwriters.com.

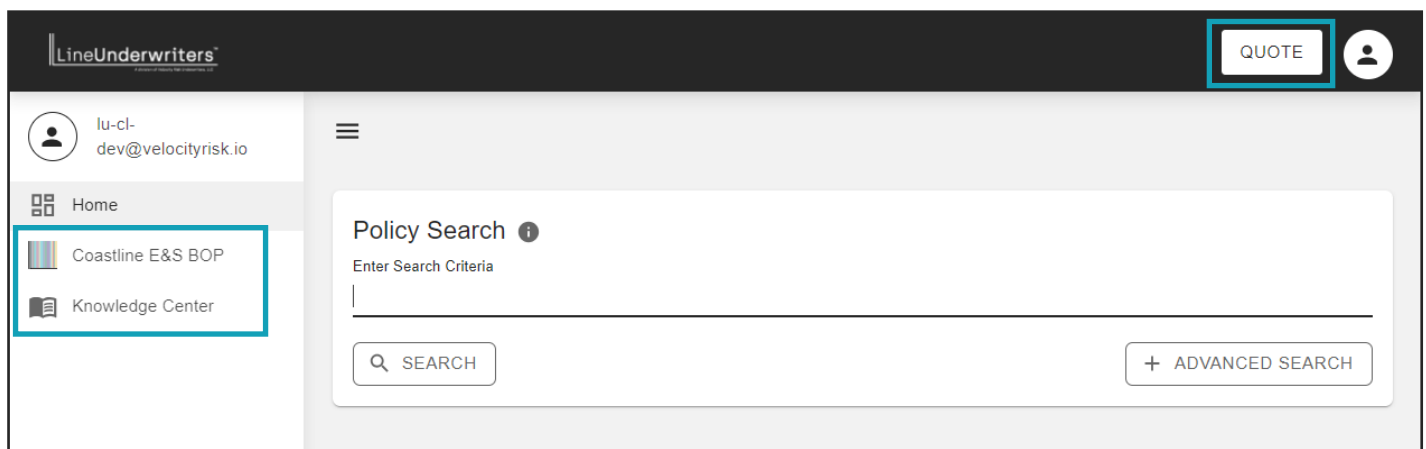


Portal Dashboard

The dashboard provides quick links to our policy administration systems and our **Knowledge Center**, your online resource center for product and system information.

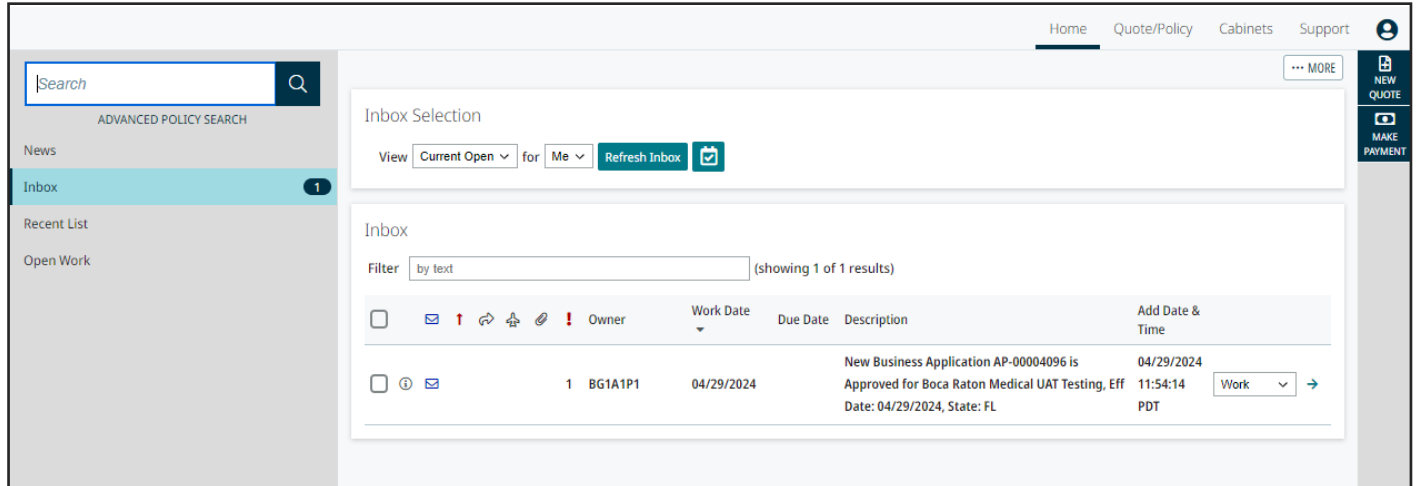
The Dashboard **Policy Search** feature will by name, address, policy/quote/app # across all platforms.

The **Coastline E&S BOP** link on the left is where all new quotes and policies will be generated. You will have access to service your new policies in this platform. You may also start a quote by clicking the **Quote** button on the top right.



System Tasks and the Inbox

Our 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.

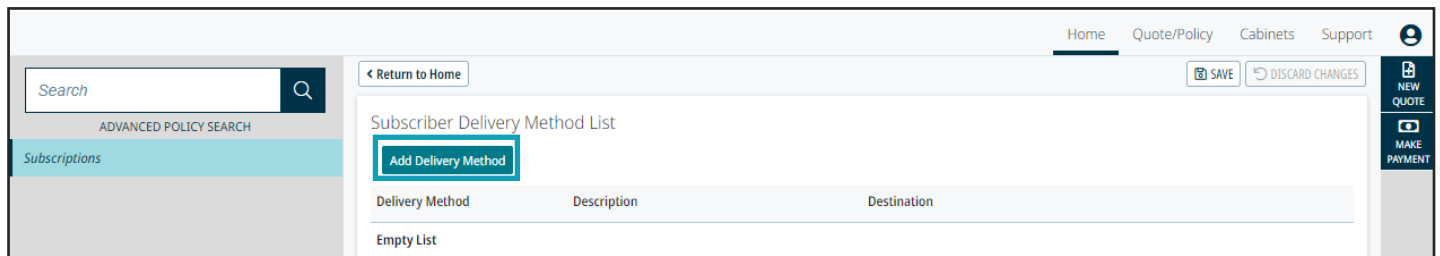
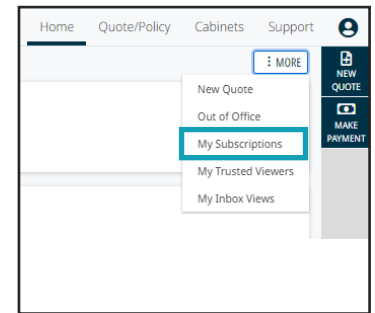


Inbox Subscriptions

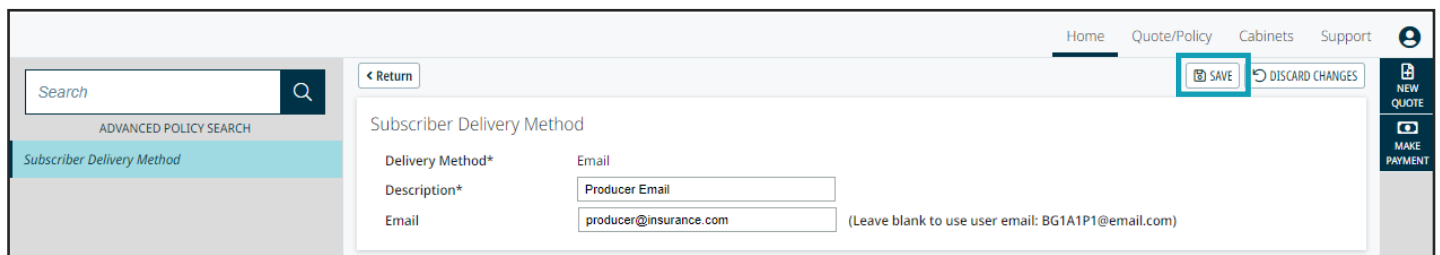
To receive Inbox notifications and Tasks to your email, set up a Subscription.

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 'Subscriber Delivery Method List' and 'Subscription List' interface. The 'Subscriber Delivery Method List' table has the following data:

Delivery Method	Description	Destination
Email	Producer Email	producer@insurance.com

The 'Subscription List' table has the following data:

Select	Description	Delivery Method	Schedule	Delivery Format	Delivery Method	Schedule	Delivery Format
<input checked="" type="checkbox"/>	Tasks Assigned to Me	Producer Email	Immediate	HTML	Select...	Select...	Select...

Tasks will now be sent to the indicated email from 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 'Inbox Selection' and 'Inbox' interface. The 'Inbox' table has the following data:

	Owner	Work Date	Due Date	Description	Add Date & Time
<input type="checkbox"/>	1 BG1A1P1	04/29/2024		New Business Application AP-00004096 is Approved for Boca Raton Medical UAT Testing, Eff Date: 04/29/2024, State: FL	04/29/2024 11:54:14 PDT

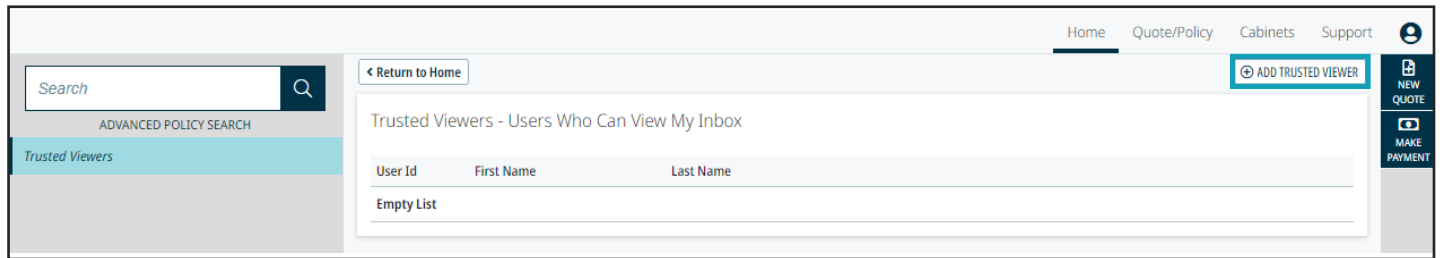
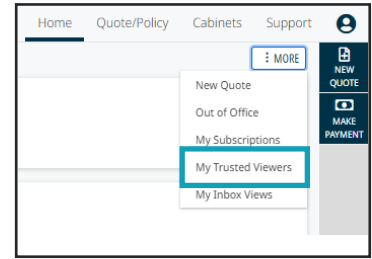
The dropdown menu for the task shows the following options: Work, Detail, Suspend, Transfer, and Work.

Trusted Viewers

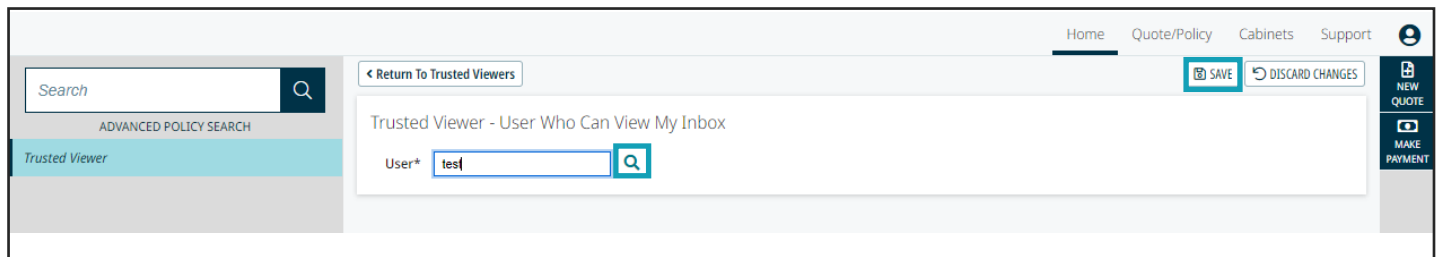
To allow others to view work items in your inbox set up a trusted viewer. Trusted viewers can work tasks directly in your inbox with the same options.

Select **My Trusted Viewers** from the More menu.

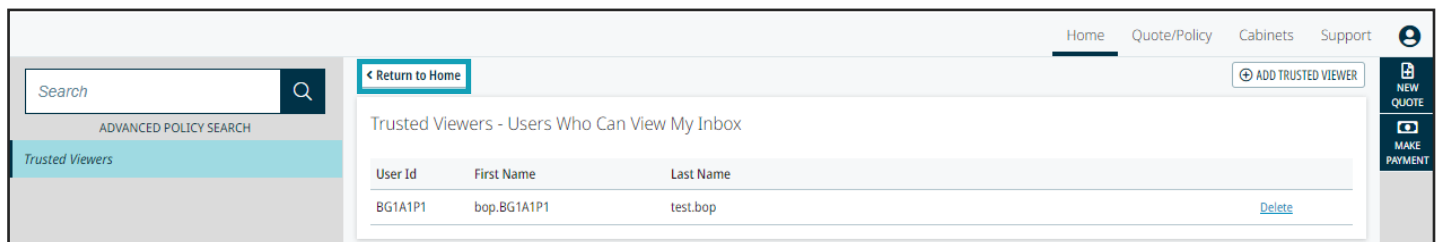
Click the **Add Trusted Viewer** button at top of the page.



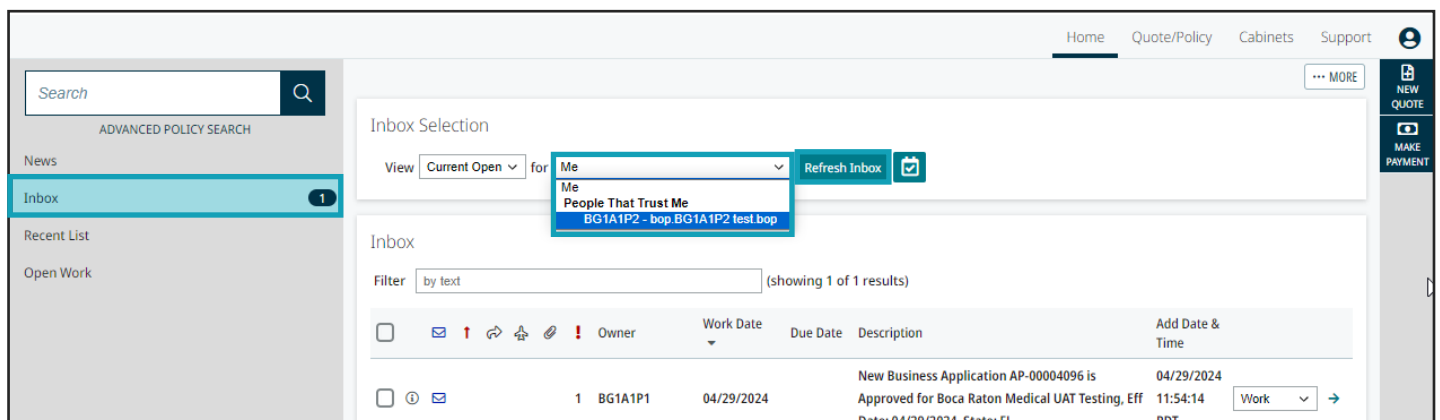
Click the search icon to search for the user you wish to designate as a trusted viewer and click on their name to add them to the trusted viewer list. Then click **Save**.



Review the list of trusted viewers and click **Return to Home**.



The user assigned as a trusted viewer will see the available inboxes under the **for** field. Select the desired inbox and click **Refresh Inbox** to view. The Inbox label reflects the selected inbox.



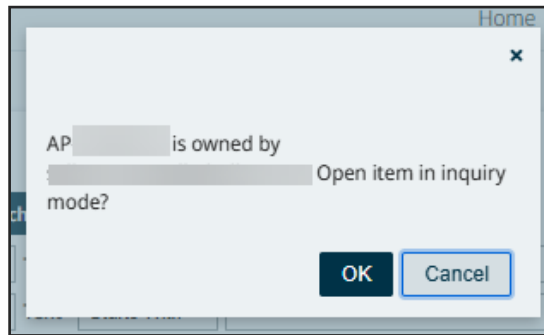
Policy Look up

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.

The screenshot shows the 'Customer Lookup' section of the application. It features a search bar at the top left with the text 'Search' and a magnifying glass icon. Below it is the 'ADVANCED POLICY SEARCH' section. The main area contains two search filters: 'Search By Customer' and 'Search By Insured'. Each filter has a dropdown menu for 'Name', a 'Text' input field, and a 'Starts With' dropdown. The 'Search By Customer' filter has 'test' entered in the text field. There are 'Search' buttons for each filter and a 'Max Hits' dropdown set to '10'. Below the filters is a 'Customer List' table with columns for Customer Number, Customer Name, Customer DBA, Entity Type, Email, and Phone Number. The table contains one row with the following data: Customer Number: 2433, Customer Name: Test BOP LLC, Customer DBA: Test BOP, Entity Type: Business, Email: test@test.com, Phone Number: (678) 678-6789.

Taking Ownership

If a policy or quote has been accessed by another, such as an underwriter, you may find that you need to take ownership. To take ownership it is a 2-step process. First, a notification message will ask you to open the policy or quote in inquiry mode. Click **OK**. Inquiry mode is similar to a read-only status.

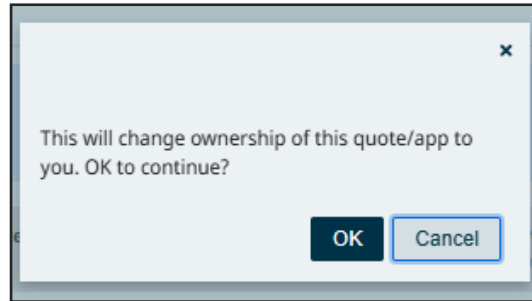


A banner will display on the top advising the policy is in inquiry mode. To take ownership click the **...More button** on the top left of the workflow buttons to access the menu. Select **Take Ownership**.

The screenshot shows the 'Quote' details page. At the top, there is a banner that reads: 'QT: [redacted] is owned by bop.agent. Quote in inquiry mode only.' Below the banner is a table with columns: Quote Number, Insured, State, Premium + Fees, Product, Sub Type, Policy Term, Producer, Producer Type, Status, and Policy TIV. The table contains one row with the following data: Quote Number: QT-[redacted], Insured: Test LRD, State: FL, Premium + Fees: \$0.00, Product: Businessowners, Sub Type: BOP, Policy Term: 09/08/2025 - 09/08/2026, Producer: Producer-, Producer Type: Retail, Status: In Process, Policy TIV: \$3,670,000.00. Below the table is a 'Basic Details' section with fields for 'Effective Date*' (09/08/2025) and 'Expiration Date*' (09/08/2026). At the bottom right, there is a 'MORE' button with a dropdown menu that includes 'Take Ownership', 'Close', and 'View Notes'.

Taking Ownership continued...

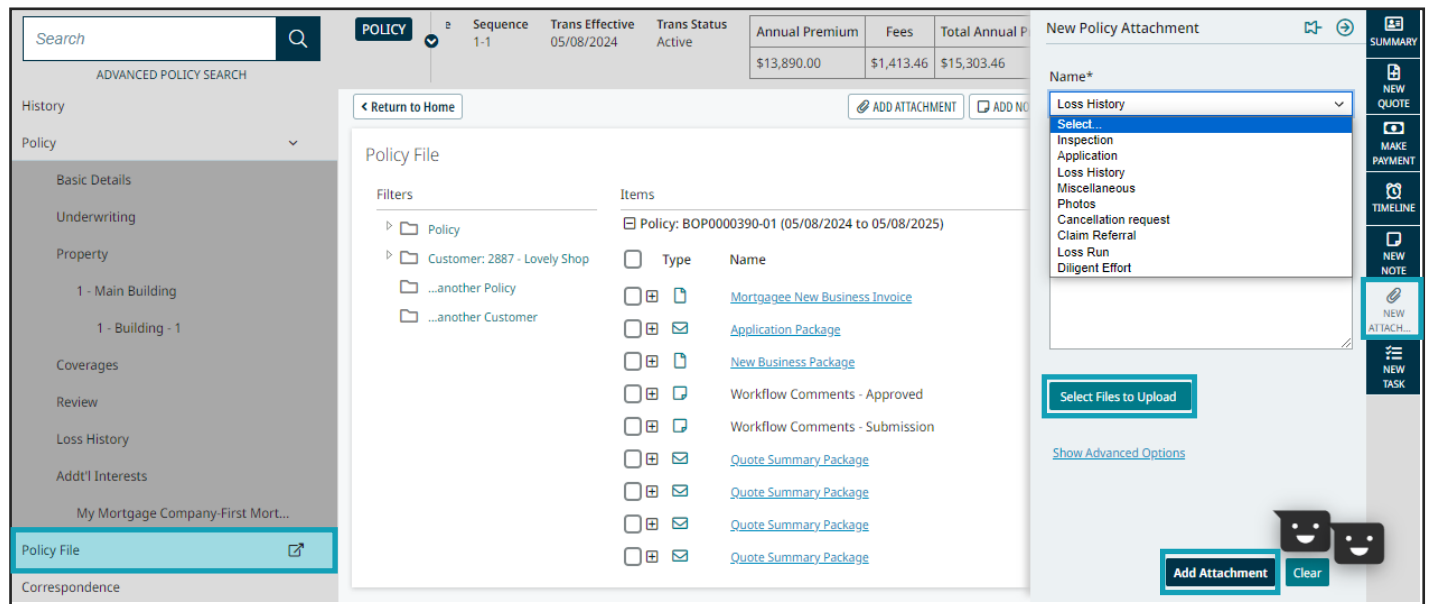
A message will display to confirm you wish to take ownership of the policy or quote. Click **OK**. You will now have full access to the policy or quote.



Policy Documents

All policy documents, including the application, declaration page, renewal packet 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, upload the document and Add Attachment.



The screenshot displays the E&S BOP Service Guide interface. The top navigation bar includes a search bar, a "POLICY" tab, and various policy details like "Sequence 1-1", "Trans Effective 05/08/2024", and "Trans Status Active". A table shows financial data: Annual Premium (\$13,890.00), Fees (\$1,413.46), and Total Annual Premium (\$15,303.46). The left sidebar lists navigation options: History, Policy, Basic Details, Underwriting, Property (1 - Main Building, 1 - Building - 1), Coverages, Review, Loss History, Add'l Interests, My Mortgage Company-First Mort..., Policy File (highlighted), and Correspondence. The main content area shows the "Policy File" tab with a "Return to Home" button and "ADD ATTACHMENT" and "ADD NOTE" buttons. A table lists items with checkboxes and icons, including "Mortgage New Business Invoice", "Application Package", "New Business Package", "Workflow Comments - Approved", "Workflow Comments - Submission", and several "Quote Summary Package" entries. On the right, the "New Policy Attachment" dialog is open, showing a dropdown menu with options like "Loss History", "Inspection", "Application", "Loss History", "Miscellaneous", "Photos", "Cancellation request", "Claim Referral", "Loss Run", and "Diligent Effort". Below the dropdown is a "Select Files to Upload" button and a "Show Advanced Options" link. At the bottom right, there are "Add Attachment" and "Clear" buttons, along with a chat icon.

Billing and Payments

Click the **Billing** section to see payment history and make payments. Direct bill policies can make a payment using the **Make Payment** button, verify the policy number and click **Pay**. Online payments can only be made by the agent. We do not have an insured facing payment portal. We accept all major credit cards and electronic checks. Commission statements are sent monthly.

The screenshot shows the 'Billing' section of the E&S BOP Service Guide. The left sidebar has 'Billing' highlighted. The main content area displays the following sections:

- Account Summary:** Status: Item is Direct Bill With A Balance Due; Bill To: Insured; Payment Plan: Automated Pay In Full; Current Due Date: 04/16/2024; Current Due: \$15,404.14; Payoff: \$15,404.14; Next Action: Electronic Payment on 04/16/2024.
- Billing Summary:**

Total Premium	Total Fees	Premium Billed	Fees Billed	Premium Adjustments	Fees Adjustments	Premium Paid	Fees Paid
\$13,986.00	\$1,418.14	\$13,986.00	\$1,418.14	\$0.00	\$0.00	\$0.00	\$0.00
- Unbilled Schedule:** Empty List.
- Invoice Summary:**

Invoice Date	Due Date	Amount Due	Payoff Amount	Type
04/16/2024	04/16/2024	\$15,404.14	\$15,404.14	Installation

To make a payment, select payment method and enter payment details. Click **Submit Payment** to post the payment to the policy.

The screenshot shows the 'Make Payment' form in the E&S BOP Service Guide. The form displays the following information:

- Account:** Bank Account - XXXX3789 (selected), New ACH, New Credit Card.
- Amount*:** \$0
- Credit Card Number*:** (empty field)
- Buttons:** Enter Credit Card Details, SUBMIT PAYMENT.

Policy Changes and Endorsements

Policy changes can be processed by clicking the **Endorse** button.

The screenshot shows the 'Basic Details' section of the E&S BOP Service Guide. The 'ENDORSE' button is highlighted. The section displays the following information:

- Effective Date*:** 05/08/2024
- Expiration Date*:** 05/08/2025
- Producer Code*:** BG1A1P1
- Surplus Line Producer*:** Velocity Risk Underwriters, LLC-2040797

Endorsements continued...

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

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

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

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

Endorsements continued...

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

The screenshot shows the 'Policy File' section of the software. At the top, there are navigation tabs: Home, Quote/Policy, Cabinets, and Support. Below the navigation, there is a search bar and a 'POLICY' dropdown menu. The main content area is titled 'Policy File' and contains a table of items. The table has columns for 'Type', 'Name', 'DateTime', and 'Email Status'. The 'Endorsement Package' item is highlighted in blue. The table also includes a 'Filters' section on the left and a 'Combine Docs' / 'Split Docs' button on the right.

Type	Name	DateTime	Email Status
<input type="checkbox"/>	Endorsement Summary	05/20/2024 13:44:46 PDT	
<input checked="" type="checkbox"/>	Endorsement Package	05/20/2024 13:44:41 PDT	
<input type="checkbox"/>	Mortgagee New Business Invoice	05/01/2024 13:56:11 PDT	
<input type="checkbox"/>	Application Package	05/01/2024 13:56:10 PDT	
<input type="checkbox"/>	New Business Package	05/01/2024 13:56:08 PDT	
<input type="checkbox"/>	Workflow Comments - Approved	05/01/2024 13:54:07 PDT	
<input type="checkbox"/>	Workflow Comments - Submission	05/01/2024 13:51:56 PDT	
<input type="checkbox"/>	Quote Summary Package	05/01/2024 13:42:29 PDT	
<input type="checkbox"/>	Quote Summary Package	05/01/2024 13:41:30 PDT	
<input type="checkbox"/>	Quote Summary Package	05/01/2024 13:39:36 PDT	
<input type="checkbox"/>	Quote Summary Package	05/01/2024 13:38:41 PDT	

Cancellations

Requests to cancel a policy must be submitted to our team by emailing coastline.underwriting@lineunderwriters.com. A signed LPR and any additional needed documentation is required.

Underwriting Communications

Questions to underwriting may be submitted by emailing our team at coastline.underwriting@lineunderwriters.com.

Renewal Process

The BOP renewal process is fully automated. Once a renewal offer is extended, the system automatically generates the renewal 30 days prior to the expiration date of the current policy.

If the insured has elected automatic payment withdrawal, the renewal payment will be deducted on the policy effective date and will follow the same payment plan selected on the active policy. For policies not set up on automatic payment, online payments must be submitted by the agent in the system for the renewal term.

If the insured has provided an email address, they will also receive a copy of their renewal via email. We do NOT mail physical copies of the renewal packet. The renewal packet can be found under the **Policy File** tab.

Signing the Application and Delivery Preference

All policies require a signed application. The preferred method is to utilize the e-signature function that is built into our system. When the delivery preference is **Email** an application is automatically sent to the provided insured email once the policy is bound. In addition, all policy documents are delivered electronically to the insured. If the delivery preference is **Agency**, the agency will assume responsibility of collecting the signed application as well as delivering all documents to the insured. Policy documents are located in the Policy File tab.

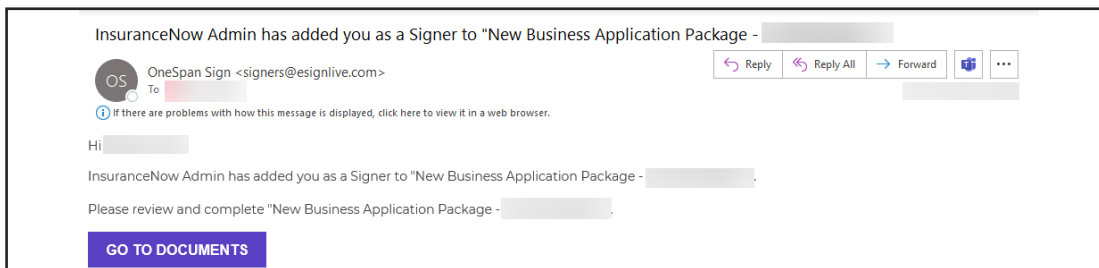
Contact

Primary Phone* (555) 777-8888

Email*

Delivery Preference

The request to electronically sign the application is emailed to the insured immediately upon binding the policy. The email will direct the insured to **Go To Documents** to review and sign. Once the insured completes signing the application, the agency will receive an email to sign as well. The email will be sent to the email address for the user that bound the policy.



Once both the insured and agent signatures are completed the **Policy File** will reflect the e-signed application. Click the link to view the signed application. If the application needs to be resent click the **Reprocess icon**. If necessary, the email address can also be changed under the reprocess icon and will not update the email address on the policy.

Filters	Items	DateTime	Email Status
Policy	Policy: BOP0000470-01 (09/25/2024 to 09/25/2025)		
Customer: 3070 - WSO Construction	<input type="checkbox"/> Type		
...another Policy	<input type="checkbox"/> Application(E-sign)	10/01/2024 07:43:54 PDT	<input type="checkbox"/>
...another Customer	<input type="checkbox"/> Application Package	10/01/2024 07:27:20 PDT	<input type="checkbox"/>
	<input type="checkbox"/> New Business Invoice	09/25/2024 11:33:48 PDT	<input type="checkbox"/>
	<input type="checkbox"/> Application Package	09/25/2024 11:33:45 PDT	<input type="checkbox"/>
	<input type="checkbox"/> New Business Package	09/25/2024 11:33:43 PDT	<input type="checkbox"/>
	<input type="checkbox"/> Quote Summary Package	09/25/2024 11:30:45 PDT	<input type="checkbox"/>
	<input type="checkbox"/> Quote Summary Package	09/25/2024 11:30:43 PDT	<input type="checkbox"/>