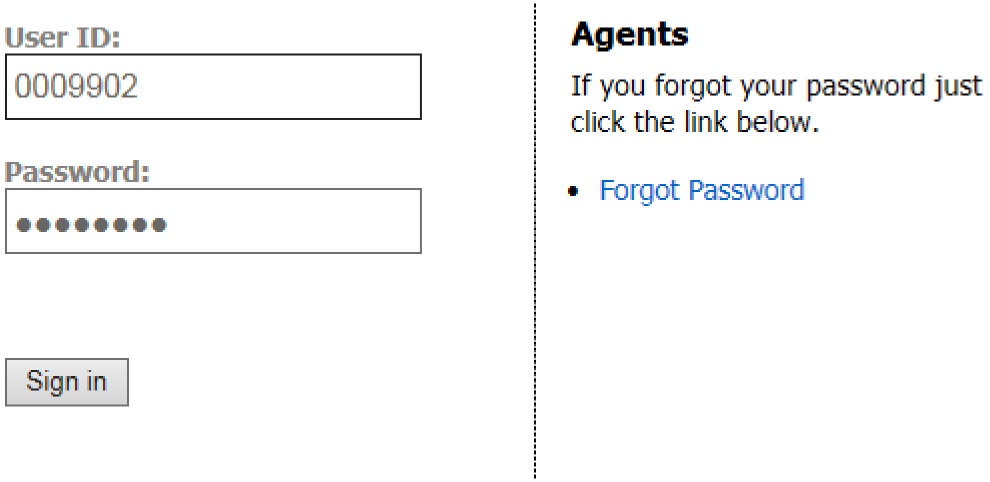
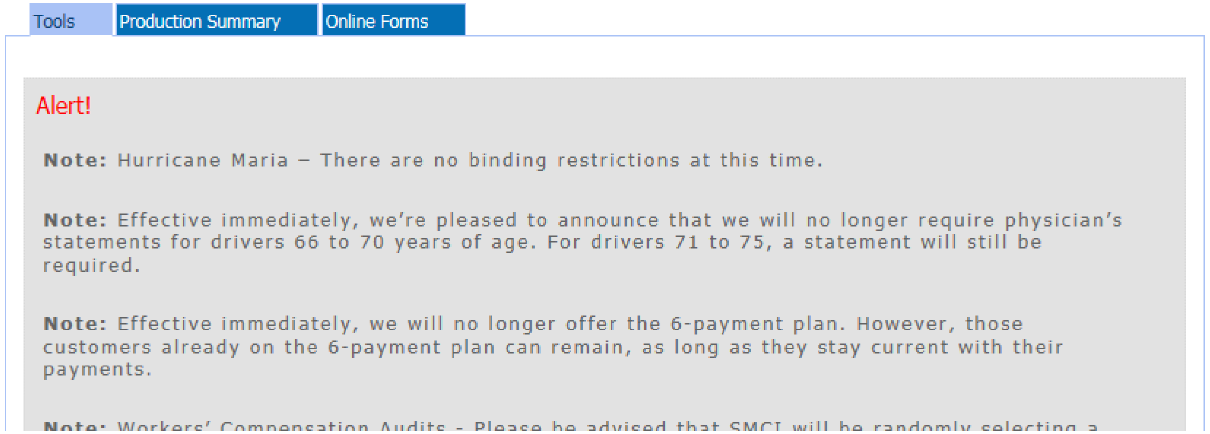
AGENT PORTAL TUTORIAL



Two things to remember on the Login page:

1) Always use the three zeroes with your agency number as the User ID.
2) If you use “Forgot Password”, the email goes to the email address given to us at the time the contract was signed.

AGENT PORTAL TUTORIAL



When you first enter the portal, you will be on the "Tools" Tab. You will also see an "Alert!" box where we will provide you with notices of important items you need to be aware of. Please give that a quick glance each time you login to see if there are any new items.

AGENT PORTAL TUTORIAL

Quote Request

- Application Log
- Special Multi Peril
- PDF Version of SMP
- Business Automobile
- PDF Version of BA
- Workers Compensation
- PDF Version of WC
- Umbrella Liability
- PDF Version of UM
- Request Tips

The first section on the **Tools Tab** is for submitting Quote Requests to the Underwriting Department. Once you begin submitting requests, the Application Log is where you will manage the requests. If you are only submitting one Line of Business, then click on the appropriate link. When you submit an SMP request, you will have the option to choose the other Lines of Business and will be automatically taken through those screens at the end of the SMP.

The “PDF Version” link for each LOB will open a PDF, allowing you to print it to take with you on a visit to a prospective church where you may not have Internet access, yet you want to have everything we require in front of you as you go through the needs of the prospect.

AGENT PORTAL TUTORIAL

Click on the Request Number to view/print the application.

REQUEST NO	CHURCH NAME	SUBMIT DATE	ASSIGNED TO	Modify
14054	Fourth Baptist Church	10/30/2017	Bonnie	SMP
14085	Third Baptist Church	10/30/2017	Bonnie	SMP
14089	Second Baptist Church	10/30/2017		SMP
11517	First Baptist Church	10/18/2017		SMP
13877		08/22/2017		BA
13318		03/29/2017		SMP
13323		03/15/2017		SMP
13319		03/14/2017		WC
13283		03/09/2017		SMP
12725	Test Pres Church	02/10/2017		SMP
12982		02/10/2017		BA
12990		01/04/2017		UM
				Prev Next

APPLICATION LOG

To view or print the entire Quote Request, click on the number in the "REQUEST NO" column. To make changes to a partially entered request that has not been submitted, click on the Line of Business in the "Modify" column. If you see a name in the "ASSIGNED TO" column, you will not be able to modify the request and will need to email any changes to the Underwriter.

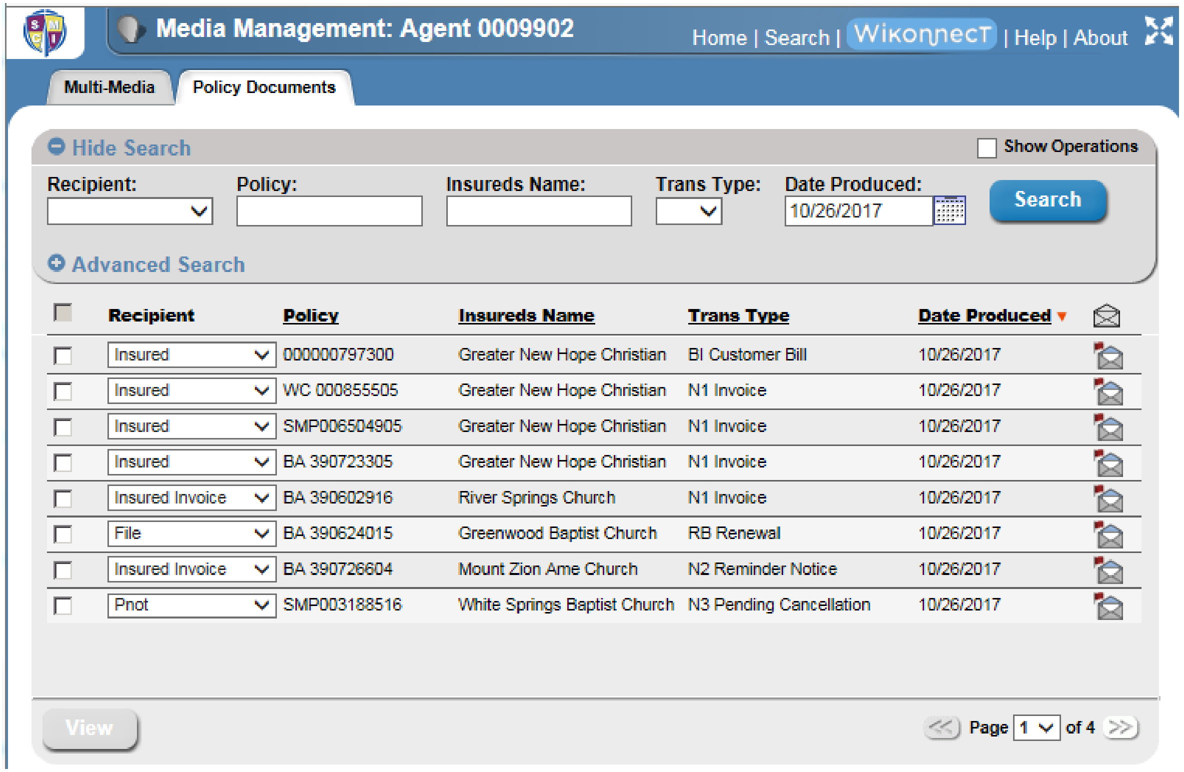
AGENT PORTAL TUTORIAL

Other

- View List of Processed Policies
- Claim History Listing
- SMCI Employee Directory
- Agency Bulletins (PDF)
- Gatekeeper (PDF)
- Supplies Request
- Data Recovery eRisk Hub
- Policy Forms List "New"

The second section on the **Tools Tab** is a miscellaneous list of “Other” links. Some will be discussed in more detail later.

- *View List of Processed Policies*—Provides a list of policies processed in our system’s Daily Cycle.
- *Claim History Listing*—Allows you to print a claim history.
- *Employee Directory*—Put a face with the voice on the other end of a phone call to us.
- *Supplies Request*—Allows you to order marketing brochures and “give away” items (Pens, etc.).
- *eRisk Hub*—Valuable information and tools from our partner, Hartford Steam Boiler, on Cyber Security and Data Recovery.
- *Policy Forms List*—A comprehensive list of all SMCI policy forms where you can view/print each form separately.



Recipient	Policy	Insureds Name	Trans Type	Date Produced
Insured	000000797300	Greater New Hope Christian	BI Customer Bill	10/26/2017
Insured	WC 000855505	Greater New Hope Christian	N1 Invoice	10/26/2017
Insured	SMP006504905	Greater New Hope Christian	N1 Invoice	10/26/2017
Insured	BA 390723305	Greater New Hope Christian	N1 Invoice	10/26/2017
Insured Invoice	BA 390602916	River Springs Church	N1 Invoice	10/26/2017
File	BA 390624015	Greenwood Baptist Church	RB Renewal	10/26/2017
Insured Invoice	BA 390726604	Mount Zion Ame Church	N2 Reminder Notice	10/26/2017
Pnot	SMP003188516	White Springs Baptist Church	N3 Pending Cancellation	10/26/2017

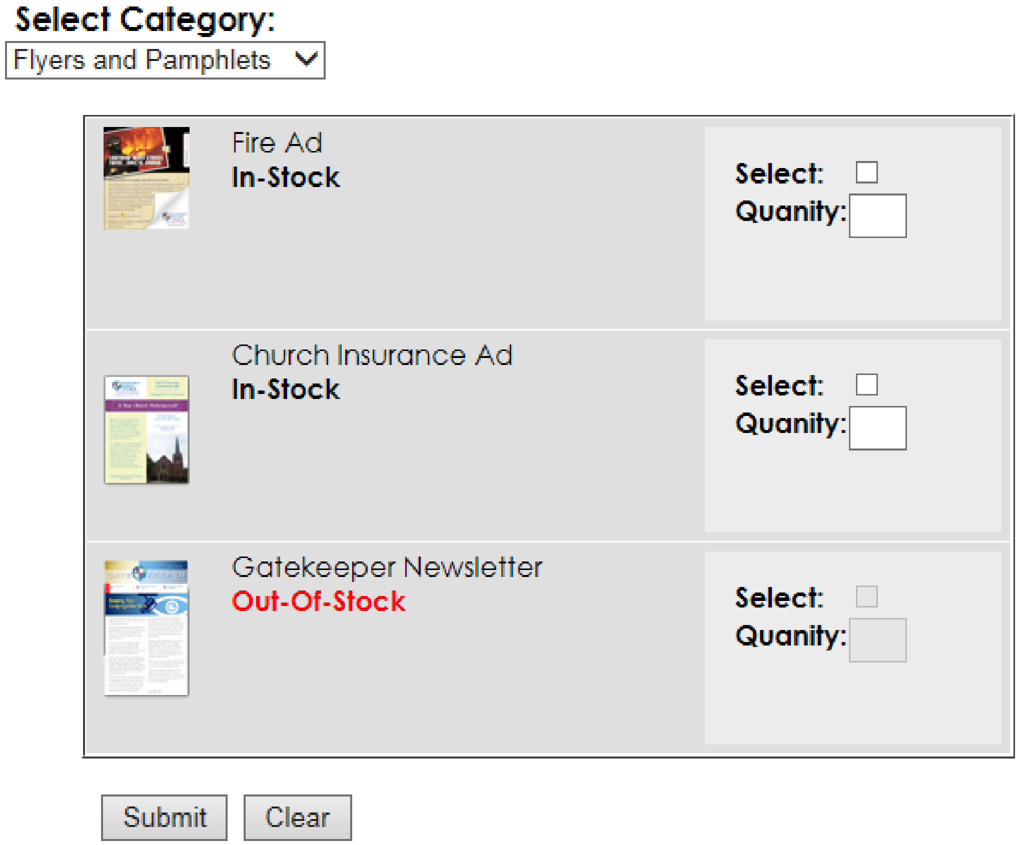
LIST OF PROCESSED POLICIES

Used to view/print/download a PDF copy of a policy, invoice, endorsement, cancellation, or other document that was produced from our system's Daily Cycle due to work that was entered into the system during that work day. You should also be receiving email notices with the same information.

Click the check box to the left of the Recipient column first. If the Recipient does not say "Insured" or "Insured Invoice", change it to one of those by clicking the down arrow. Click the "View" button. A new tab with a PDF copy of the document should open and allow you to save and/or print it.

You can also change the "Date Produced" to an older date, then click "Search" to view earlier processed work.

AGENT PORTAL TUTORIAL



SUPPLIES REQUEST

Use the Dropdown box to choose your category (Flyers/Pamphlets, Stationary, or Give Away). Click the "Select" checkbox next to the item you need, then enter a quantity. Once you have made all your choices, click the Submit button. An email will be sent to Paula Moots and she will send you the items you requested. If you need items from different categories, you will need to click Submit before moving to the next category.

AGENT PORTAL TUTORIAL

My Policies

- Policy List by Policy Number
- Policy List by Insured Name

Cust. No.	Symbol	Policy	Insured Name	Eff. Date	Exp. Date	Change Request	Invoice	Policy	Archive
0000025571	SMP	0066465	ABBEVILLE CONGREG HOLINESS CH	1/14/2017	1/14/2019	Submit Request	View	View	View
0000020101	BA	3906249	ABUNDANT LIFE OUTREACH MIN	12/14/2016	12/14/2017	Submit Request	View	View	View
0000020101	WC	0007135	ABUNDANT LIFE OUTREACH MIN	12/14/2016	12/14/2017	Submit Request	View	View	View

Account Summary | Payment History | Claim History

Balance

Policy Type:	Exp Date:	Total Premium:	Total Paid:	Balance:	Payment Type:
SMP 0031351	6/15/2018	$1,443.00	$721.50	$721.50	Direct Bill

Next Payment

Policy Type:	Next Payment:	Due Date:
SMP	$355.75	12/15/2017

The third section on the **Tools Tab** gives you the ability to view the book of business for the specific agency code you are logged in under.

- *Policy List by Policy Number*—Provides a list of policies in effect grouped by policy “Symbol” (Line of Business), then sorted by policy number.
- *Policy List by Insured Name*—Provides a list of policies in effect sorted by Insured Name.

Both options give you the ability to click on the Customer Number to view an Account Summary showing current account balance, an account payment history, and a claim payment history. You can also submit policy change requests and view policy/invoice documents.

AGENT PORTAL TUTORIAL

POLICY ENDORSEMENT:CHANGE REQUEST FORM

Insured Name:	ABBEVILLE CONGREG HOLINESS CH
Location of Church:	PO BOX 946
City/State:	ABBEVILLE SC
Policy Type:	SMP 0066465
Effective Date of Change:	
Description of Change:	

AGENTS INFORMATION

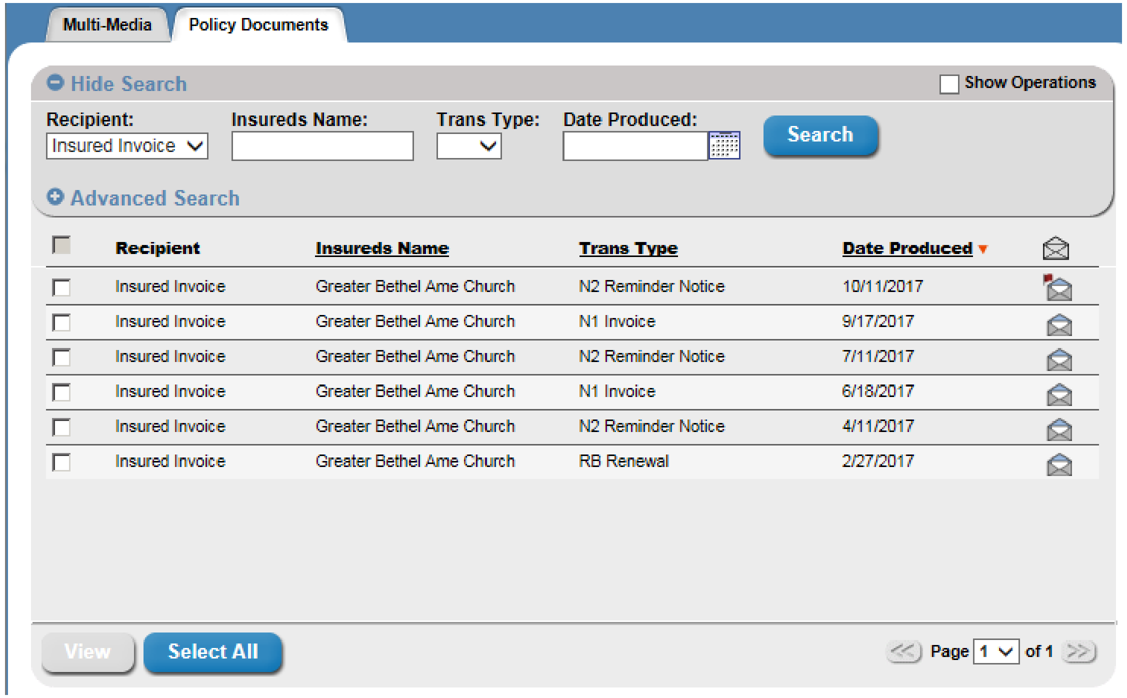
Requested By:		
Your E-Mail:	cvarnadoe@smcins.com	Change e-mail if not correct
Phone Number:		

Submit

CHANGE REQUEST FORM

Fill out this form, then click the "Submit" button to send policy change requests directly to the Underwriting Department via email.

AGENT PORTAL TUTORIAL



INVOICE/POLICY VIEW/PRINT/DOWNLOAD

When you click on “View” in the “Invoice” or “Policy” columns, you should see this screen. If the screen lists nothing, click on the Recipient dropdown box and change the option from “Insured Invoice” to just “Insured”, then click the “Search” button and a list should appear.

To view a document, click the checkbox to the left of the document to view, then click the “View” button. A PDF of the requested document should open in a new tab, giving you the option to print the document or save it to your local system.

See the next page for more information on what to do if you know the policy has been processed in our system for the next policy term, but do not see that effective date listed, using the “Archive” column.

AGENT PORTAL TUTORIAL

Close

est	Invoice	Policy	Archive
	View	View	View

0000005951	SMP	0066005	HILL ZION BAPTIST CHURCH	11/13/2016	11/13/2017

Symbol	Policy	Insured Name	Eff. Date	Exp. Date	Invoice	Policy
SMP	0066005	HILL ZION BAPTIST CHURCH	11/13/2017	11/13/2018	View	View
SMP	0066005	HILL ZION BAPTIST CHURCH	11/13/2016	11/13/2017	View	View
SMP	0066005	HILL ZION BAPTIST CHURCH	11/13/2015	11/13/2016	View	View
SMP	0066005	HILL ZION BAPTIST CHURCH	11/13/2014	11/13/2015	View	View

VIEW ARCHIVE OPTION

If you have a policy that is close to renewing into the next term and you know it has been processed in our system, but you still see the old term in the policy list, click on “View” in the “Archive” column to see a list of all policies in our system.

In this example, the policy list is only showing the current term, 11/13/2016 to 11/13/2017. However, when you click on View in the Archive column, you now see the upcoming term (11/13/2017 to 11/13/2018) is already available in the system. You can now view the documents in that term by clicking in one of the columns.

AGENT PORTAL TUTORIAL

Tools | Production Summary | Online Forms

Select Agency: 0009902

MTD PREMIUM:	$86,586.00
YTD PREMIUM:	$623,390.00
EARNED PREMIUM:	$615,935.39
INFORCE PREMIUM:	$831,929.00
LOSSES PAID YTD:	$194,693.79
CURRENT LOSS RESERVES:	$76,834.86
PRIOR YEAR LOSS RESERVES:	$18,291.04
LAE PAID YTD:	$18,047.47
CURRENT LAE RESERVES:	$10,482.40
PRIOR YEAR LAE RESERVES:	$16,810.49
TOTAL INCURRED LOSSES:	$264,957.00
LOSS RATIO:	43.02

PRODUCTION SUMMARY TAB

The Production Summary screen shows you a summary of your book of business as of the most recent Month-End processed in our system. For example, if you run go to this page in the month of June, the data you are viewing will be through for the period January 1 through May 31.

If you are logged in as a Master Agent, you can use the dropdown box to view the summary for each of your agency codes. It will also have a second set of numbers below this one showing the total of all your agency codes together.

AGENT PORTAL TUTORIAL

Tools | Production Summary | Online Forms

You will find our updated Rules Manual and state exceptions to that manual, as well as PDF copies of all SMCIC policy forms. If you need assistance with any of these forms, please do not hesitate to contact Chris Varnadoe at cvarnadoe@smcins.com or telephone at extension 108.

See Instruction for Claims

Rules and Rates

- Quick Rate Sheet GA 10/11/2017
- Quick Rate Sheet KY, NC, SC and TN 10/11/2017

Loss Notice Forms

- Property Loss
- Liability Loss
- Business Auto Loss

Workers Compensation Loss Notice Forms

- GA-Workers Compensation Form.pdf 7/1/2006
- NC-Workers Compensation Form.pdf 2/1/2001
- SC-Workers Compensation Form.pdf 3/1/1996
- TN-Workers Compensation Form.pdf 9/1/1999

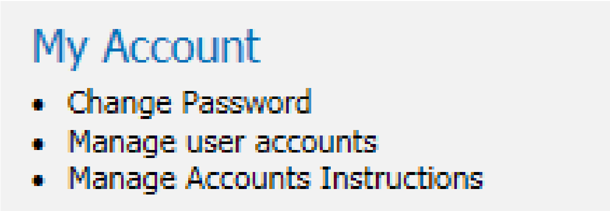
ONLINE FORMS

Rules and Rates
Use this page to access PDF files giving quick references to the optional coverages and their respective premiums for each state.

Loss Notice Forms
Use these fillable PDF forms to submit Loss Notices via email. You should receive an email confirmation in return.

WC Loss Notice Forms
Use these PDF forms to submit Workers Compensation Loss Notices to our Third Party Administrator. The address is indicated on each form.

AGENT PORTAL TUTORIAL



MY ACCOUNT

My Account is at the bottom of each page in the Agent Portal and is used to maintain the password for the Agency Code you are logged in under, as well as to add/delete additional user accounts.

Manage User Accounts
You can create new user accounts under the Agency Code you are logged in under. You can assign the user to one of the following Roles: Agent/User/Associate. Each of these roles will have a different level of access to the Agent Portal (see the Manage Accounts Instructions link for more information on these roles).

Manage Accounts Instructions
A PDF with the instructions on how to add/delete users and assign them to different roles.