



System Training

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Agency Portal Overview

Welcome to the Hallmark Flex system! We're excited to introduce our easy-to-navigate agency portal designed with you in mind! All of the tools you need to service your Hallmark book are available from the Agency Home Page. This new home page includes:

- **Daily Action Items** – Inclusive of daily action items needing follow-up, including e-signatures, pending cancellations, recently cancelled policies, unpaid renewals, outstanding RINs and recent endorsements.
- **Quick Links** – Make a Payment, Quote and Policy Searches
- **Top Navigation menu** – Easy access to all policy related items, reports, as well as product and training materials
- **Message Center** – We will be posting state specific information in this area to keep agents up to date on product changes, weather alerts, industry related topics and much more!

Compatibility

The Flex system is compatible with multiple browsers, but runs optimally using the Google Chrome browser. The following links are provided if you are using a browser other than Google Chrome and need instructions on how to install the application.

English:

<https://support.google.com/chrome/answer/95346?hl=en>

Spanish:

<https://support.google.com/chrome/answer/95346?hl=es>

Agent Login

1. Go to Hallmark's website at www.personal.hallmarkgrp.com and login with your username and password.
2. To access the Hallmark FLEX portal, click on the Hallmark FLEX Login button or go directly to the FLEX portal at www.hplagent.com and login with your username and password, click Login



Password Changes

Password changes will be handled at the agent level for the Hallmark FLEX portal. Simply click either the "Forgot Password" or "Change Password" links, located below the Password field on the FLEX login page. If you do not currently have your login information, please contact our internal marketing department at, 800-486-5616 Ext. 3163.



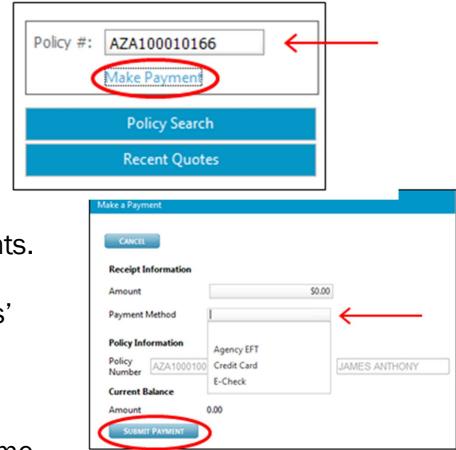
The screenshot shows the Hallmark FLEX login interface. At the top right, there are two links: "Forgot Password?" and "Change Password?", which are both circled in red. Below these links is a checkbox labeled "Remember Me". At the bottom of the form, there are "LOGIN" and "CLEAR" buttons, and the text "v530.004.100-60" at the very bottom.

Features

Quick Pay

Agents can access the quick payment feature on the Home page to quickly post a payment without additional billing or policy review.

1. To make a payment, enter a policy number and click Make Payment located on the home screen.



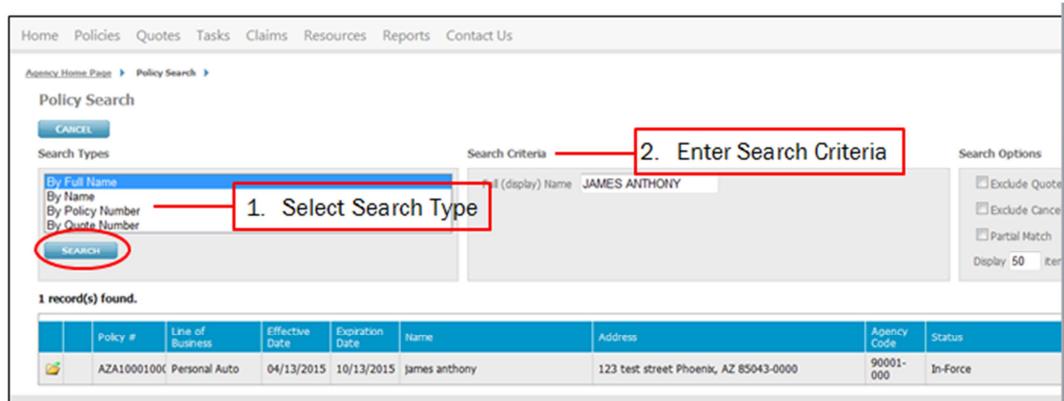
Policy Search

To search for a policy, click on the Policy Search bar located on the home screen.

1. Select the method of search under the Search Types, including the following options.
 - By Full Name
 - By Name
 - By Policy Number
 - By Quote Number



In this example, a search is being performed by Full Name. A partial name search can be performed. Any portion of the insured information can be entered in the appropriate fields, then click the Search button.



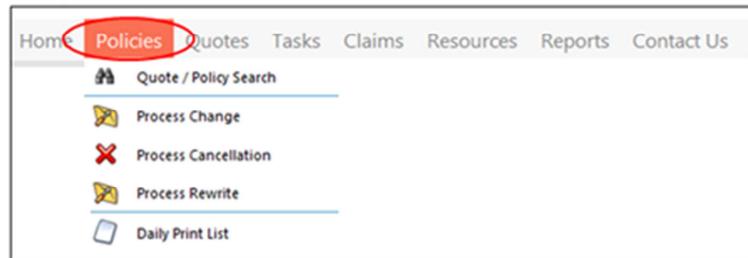
	Policy #	Line of Business	Effective Date	Expiration Date	Name	Address	Agency Code	Status
	AZA1000100	Personal Auto	04/13/2015	10/13/2015	james anthony	123 test street Phoenix, AZ 85043-0000	90001-000	In-Force

Tip: The policy history, including all activity for prior, current and renewal terms are available by clicking the yellow folder to load the policy.

Quote Search

Accessing recent quotes is quick and easy! Simply click the Recent Quotes button on the home page.

1. A list of recent quotes will appear giving you the option to view or delete.
2. Select the ballot box to the left of the quote number and click the appropriate action. The ability to search by Quote Type and Line of Business will also be an option.

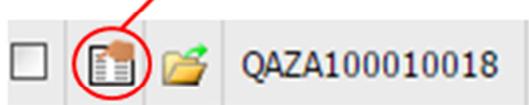



Tip: An alternate method of searching for a policy or quote is under the Policies menu.

3. To View Task Details, click on the icon to the left of the quote number. The viewable tasks will load, giving you additional information on the quote.

The task list will load, giving you additional information about the risk.

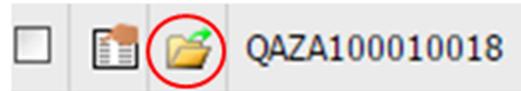
Select the icon to view task lists




User:	Hallmark\SEagent	Transaction Type:	E
From:	SEagent (Hallmark)	Transaction Remarks:	
Original:	Hallmark (SEagent)	Remarks:	Policy Pending Endorsement
Due Date:	7/25/2015	Insured:	anthony; james
Add Date:	7/25/2015	Effective Date:	4/13/2015
Days Past:	7	Renewal Date:	10/13/2015
Policy/Claim:	AZA100010008	Agency Name:	KF Incorporated
Quote Number:	QAZA100010018	Agency Code:	90001-000
Is Diary:	No	Quote Type:	N/A
Is Urgent:	No	Line of Business:	Personal Auto
Is Mandatory:	No	Restricted Policy Type:	N/A

[Workflow Id: 4237] [Policy Id: 27\3] [Item: #1]

4. To open a saved quote, click on the folder icon to the left of the quote number. The quote will load and return you to the exact place you were in the quoting process, allowing you to make changes, rerate and issue the policy.



Accessing Your Daily Action Items

Daily Action Items

Policies Pending Cancellation (0)	(down arrow)
Recently Cancelled Policies (0)	(down arrow)
Unpaid Renewals (0)	(down arrow)
Policies with a RIN Outstanding (1)	(down arrow)
Recent Endorsements within 5 days (1)	(down arrow)

Policies Pending Cancellation

- Underwriting Reasons
- Non-Payment

Recently Cancelled Policies

Policies are grouped by eligible action:

- Reinstating without a lapse in coverage
 - The statement of no loss must be performed on policies being reinstated without a lapse before applying payment
- Reinstating with a lapse in coverage
- Rewrite with a lapse in coverage

Unpaid Renewals

Policies grouped by:

- Renewal Offers with upcoming due dates
- Expired policies eligible for renewal with a lapse

Policies with A RIN Outstanding (Request for Additional Information)

List of policies with outstanding underwriting requests



Recent Endorsements within 5 Days

List of policies with recent endorsements processed by the agent or company

Message Center

The message center will display state specific notices, including product changes or enhancements, weather alerts, hours of operation changes and much more.

Home Policies Quotes Tasks Cl

Policy #:
[Make Payment](#)

[Policy Search](#)

[Recent Quotes](#)

[Message Center \(view all \)](#)

This is a sample message
01/01/2015
Messages can be configured from the Employee portal under Utilities / Portal Configuration.

Quoting and Binding

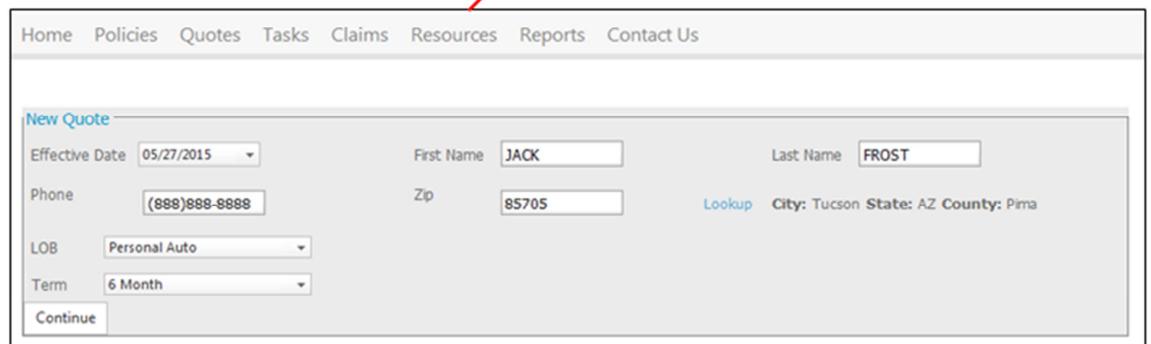
For a Quick Quote estimate, FLEX offers the ability to generate a quote with minimal information required. To receive a precise quote, the Full Quote option must be performed. This requires accurate driver and vehicle information be entered. All reports are ordered during this process.

Quick Quote

1. To start quick quote, click on the “Quick Quote” link located under the “Quotes” tab.



2. Enter the required information:
 - Complete ALL New Quote fields
 - Click “Continue”



New Quote

Effective Date: 05/27/2015 First Name: JACK Last Name: FROST

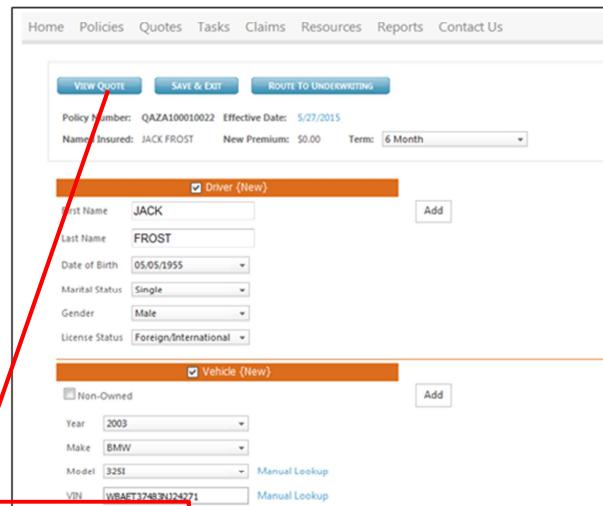
Phone: (888)888-8888 Zip: 85705 Lookup City: Tucson State: AZ County: Pima

LOB: Personal Auto Term: 6 Month

Continue

All fields must be completed

3. Enter in your insured's information:
 - Driver Information:
 - Complete ALL driver information fields
 - For additional drivers, click the “Add” button
4. Vehicle Information
 - Select corresponding Year, Make and Model. Although not required during Quick Quote, it is recommended to enter “VIN number”
 - Select coverages and policy limits
 - For additional vehicles, click “Add” button



VIEW QUOTE SAVE & EXIT ROUTE TO UNDERWRITING

Policy Number: QAZA100010022 Effective Date: 5/27/2015
Name Insured: JACK FROST New Premium: \$0.00 Term: 6 Month

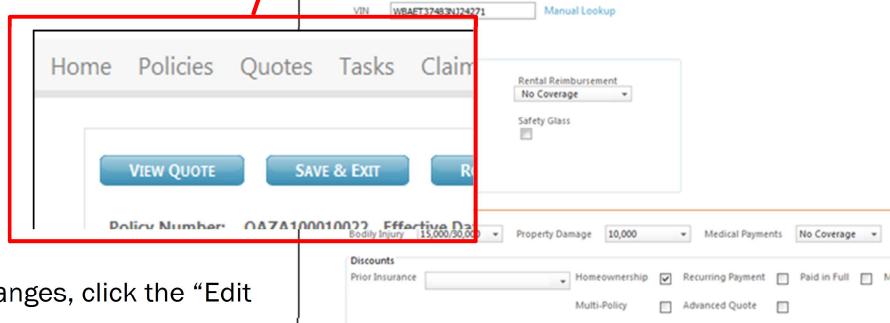
Driver (New)

First Name: JACK
Last Name: FROST
Date of Birth: 05/05/1955
Marital Status: Single
Gender: Male
License Status: Foreign/International

Vehicle (New)

Non-Owned
Year: 2003
Make: BMW
Model: 325i
VIN: WBART32483UJ24271

5. Discounts
 - Select eligible discounts.
6. Click “View Quote”
7. Quick Quote Review
 - If there is need to make changes, click the “Edit Quote” button



Home Policies Quotes Tasks Claims

VIEW QUOTE SAVE & EXIT ROUTE TO UNDERWRITING

Policy Number: QAZA100010022 Effective Date: 5/27/2015
Bodily Injury: \$15,000/50,000

Property Damage: 10,000 Medical Payments: No Coverage

Rental Reimbursement: No Coverage
Safety Glass:

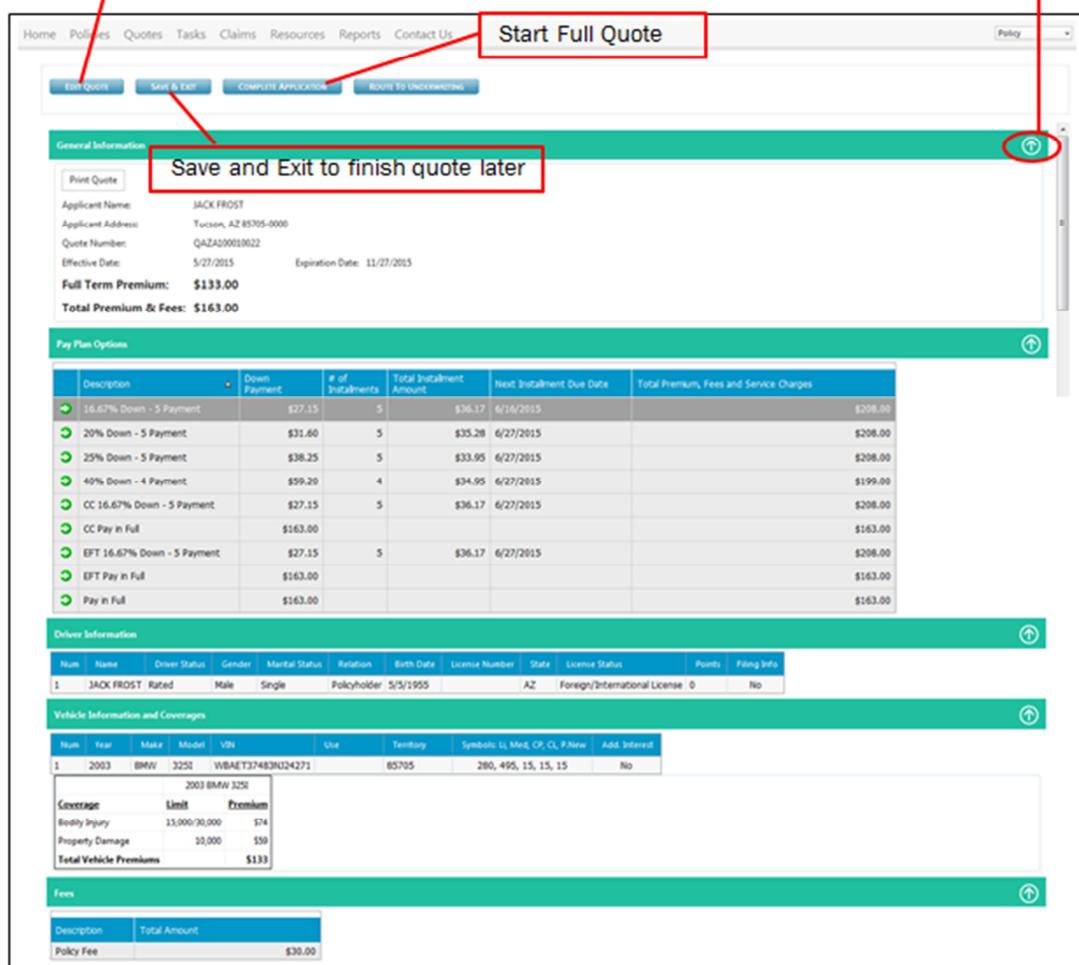
Discounts

Prior Insurance: Homeownership Recurring Payment Paid in Full Multi-Policy Advanced Quote

- To save quote for later review, click “Save & Exit”
- If the quote is accepted, click “Complete Application” to start the “Full Quote” process

Edit Quote to make revisions

Use arrows to expand and review each section



General Information

Pay Plan Options

Description	Down Payment	# of Instalments	Total Instalment Amount	Next Instalment Due Date	Total Premium, Fees and Service Charges
16.67% Down - 5 Payment	\$27.15	5	\$36.17	6/16/2015	\$208.00
20% Down - 5 Payment	\$31.60	5	\$35.28	6/27/2015	\$208.00
25% Down - 5 Payment	\$38.25	5	\$33.95	6/27/2015	\$208.00
40% Down - 4 Payment	\$59.20	4	\$34.95	6/27/2015	\$199.00
CC 16.67% Down - 5 Payment	\$27.15	5	\$36.17	6/27/2015	\$208.00
CC Pay in Full	\$163.00				\$163.00
EFT 16.67% Down - 5 Payment	\$27.15	5	\$36.17	6/27/2015	\$208.00
EFT Pay in Full	\$163.00				\$163.00
Pay in Full	\$163.00				\$163.00

Driver Information

Num	Name	Driver Status	Gender	Marital Status	Relation	Birth Date	Licence Number	State	Licence Status	Points	Filing Info
1	JACK FROST	Rated	Male	Single	Policyholder	5/5/1955		AZ	Foreign/International License	0	No

Vehicle Information and Coverages

Num	Year	Make	Model	VIN	State	Territory	Symbolic Lic. Med. Cr. Cl. & New	Add. Interest
1	2003	BMW	325i	WBAET37483NJ24271	85705		280, 495, 15, 15, 15	No

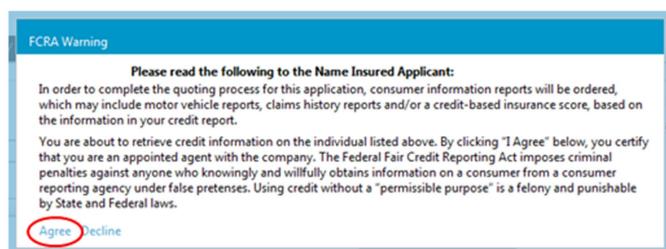
Coverage

Coverage	Limit	Premium
Bodily Injury	15,000/30,000	\$74
Property Damage	10,000	\$59
Total Vehicle Premiums		\$133

Fees

Description	Total Amount
Policy Fee	\$30.00

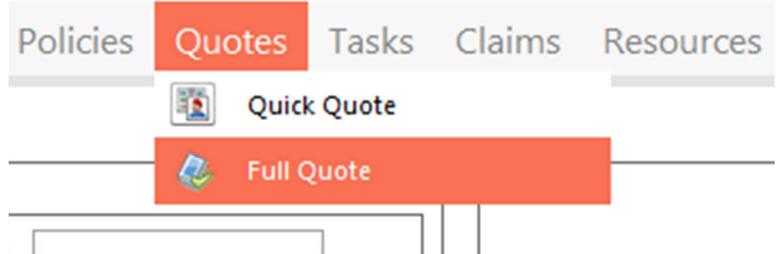
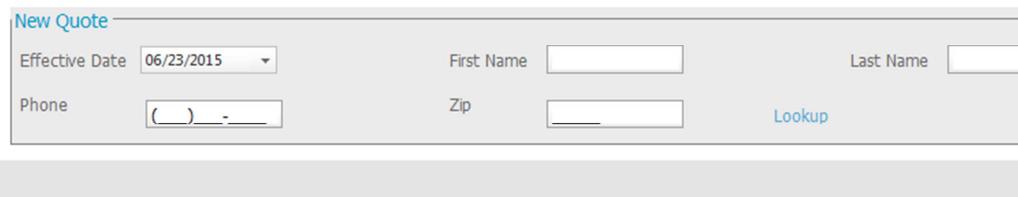
8. The following FCRA warning will appear. This must be read to the applicant before proceeding. After reading, please accept by clicking “Agree”. Declining the FCRA warning will close the quote. The quote will remain available in your Recent Quotes list if you decide to continue later.



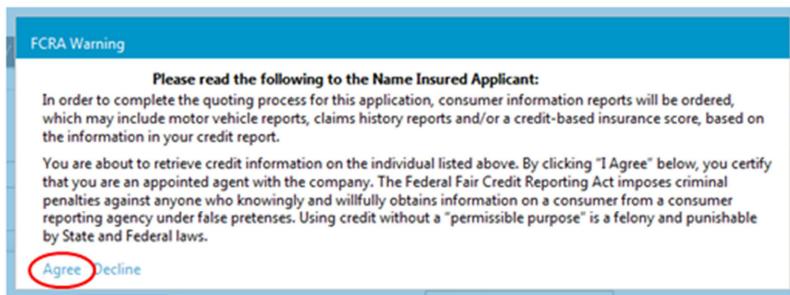
Full Quote

If you are starting your quote as a “Full quote” follow all steps provided below. If you are transitioning from quick quote start the full quote process will begin at step 3.

1. Click on the “Full Quote” link located under the “Quotes” tab
2. Enter the required information:
 - Complete ALL New Quote fields
 - Click ‘Continue’

3. The following FCRA warning will appear. This must be read to the applicant before proceeding. Declining the FCRA warning will close the quote. The quote will remain available in your Recent Quotes list if you decide to continue later. After reading, please accept by clicking “Agree” or “Decline”.





Policy Info

4. Complete the required information, indicated with the *Red asterisks

Navigation bars appear at the top and bottom of the screen to move you through the quote. Click “Next” to move through each tab.

The address validation screen below may appear. If this prompt appears, review the policy address for accuracy. If the address returned is valid, click "Select". To proceed without updating to the suggested address, click "Cancel".

Tip: Do not enter both a PO Box and a street address on the Policy Information screen. For policies with a PO Box mailing address, enter the physical garaging location on the Vehicles tab.

Partial Address Match

Address Verification has returned multiple matches or the address is not fully confident.

Please select an address or click cancel to continue with the address that was entered.

Select	Confidence	Address
Select	50	1870 W Primrose Tucson, AZ 85705-0000

CANCEL

Home Policies Quotes Tasks Claims Resources Reports Contact Us

JACK FROST
QAZA100010022
Personal Auto
Premium \$133.00

Quote Type
 Quick Quote
 Full Quote

[Save & Exit Quote](#)
[Cancel Quote](#)
[Route To Underwriting](#)

Policy Info
Drivers
Vehicles
Coverages / Discounts / Prior Carrier
UW Questions / Attachments
Losses / Violations
Billing Info
Policy Svc

Policy Information

Company

State Policy Term

Effective Date Expiration Date First Written Date

Policy Holder Information

Name:	<input type="text" value="JACK"/>
Street:	<input type="text"/>
City:	<input type="text" value="FROST"/>
Zip:	<input type="text" value="000-00-0000"/>
Birth Date:	<input type="text" value="05/05/1955"/>
Phone:	<input type="text" value="Home"/> <input type="text" value="(888)888-8888"/> <input type="checkbox"/> Primary
Email:	<input type="text" value="Home"/>

Agency Information

Name

Producer

Code

Address

Country:

Street #:

Street:

Apt/Suite #:

P. O. Box:

City:

State:

Zip:

County:

Attempted Verified

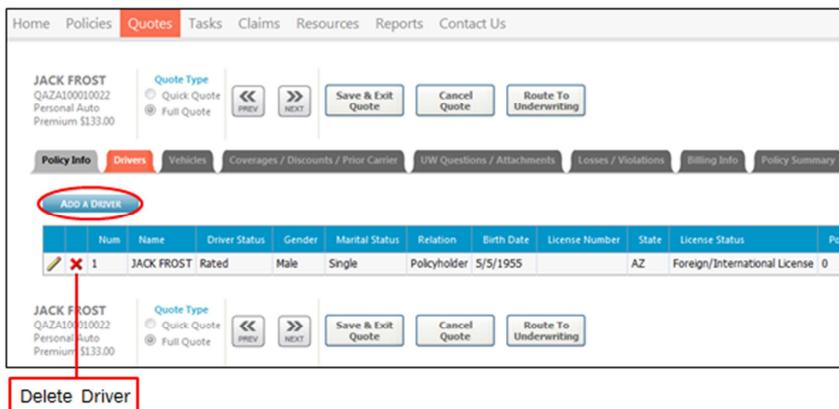
Google Maps

5. Continue to the Drivers tab by clicking "Next".

Drivers

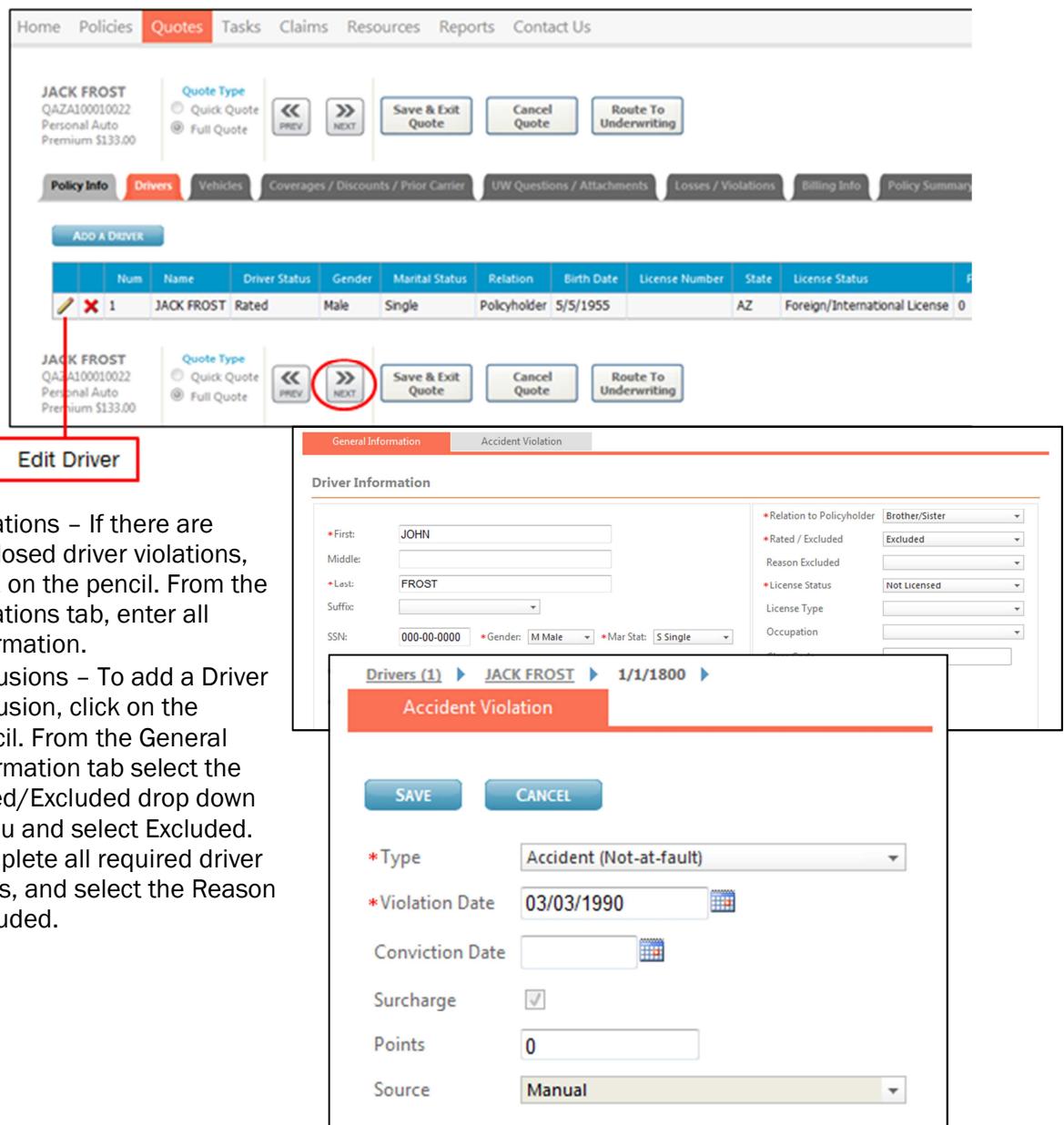
6. Adding and Deleting Drivers
 - Add Driver – Click “Add Driver”.
 - Enter Driver Information, Click “Save Driver”
 7. Delete Driver – Click on the X to the left of the driver name.

JACK FROST Personal Auto Premium \$133.00	Quote Type <input type="radio"/> Standard Quote <input checked="" type="radio"/> Full Quote	 next	Save & Exit Quote	Cancel Quote	Route To Underwriting
---	---	---	-------------------	--------------	-----------------------



8. Editing Driver – Click the pencil to the left of the driver name.
- Validate or enter accurate driver's license number or other eligible document numbers (ie. FDL, Matricula, passport, etc.)
 - The Hallmark Flex program is a credit based program – remember to enter the insured's social security number for the most accurate rate.
 - SR22 – To add an SR22, click on the pencil. From the General Information tab select SR22 under Filing Information.
 - When all edits have been made, click the “Save Driver” button.

Tip: Occupation is an optional field unless business/artisan use exists. When quoting a risk with a business/artisan use vehicle, be sure to enter the Occupation for all rated drivers.



The screenshot shows the Hallmark Specialty Personal Lines software interface. The top navigation bar includes Home, Policies, Quotes (selected), Tasks, Claims, Resources, Reports, and Contact Us. Below the navigation bar, a summary box for "JACK FROST" shows policy details: QAZA100010022, Personal Auto, Premium \$133.00. To the right are Quote Type (Quick Quote, Full Quote) buttons, Prev/Next navigation buttons, and Save & Exit Quote, Cancel Quote, Route To Underwriting buttons. Below this is a tab bar with Policy Info, Drivers (selected), Vehicles, Coverages / Discounts / Prior Carrier, UW Questions / Attachments, Losses / Violations, Billing Info, and Policy Summary. A large table titled "ADD A DRIVER" lists one driver: JACK FROST, Num: 1, Name: JACK FROST, Driver Status: Rated, Gender: Male, Marital Status: Single, Relation: Policyholder, Birth Date: 5/5/1955, License Number: , State: AZ, License Status: Foreign/International License: 0. An edit icon is next to the first row. A red box labeled "Edit Driver" is placed over the first row. Below the table is another set of navigation buttons: Prev, Next (circled in red), Save & Exit Quote, Cancel Quote, and Route To Underwriting. A red box highlights the "NEXT" button. To the right, a "General Information" tab is selected in a driver detail panel. This panel contains "Driver Information" fields: First: JOHN, Middle: , Last: FROST, Suffix: , SSN: 000-00-0000, Gender: M Male, Mar Stat: S Single. It also includes dropdowns for Relation to Policyholder (Brother/Sister), Rated / Excluded (Excluded), Reason Excluded, License Status (Not Licensed), License Type, and Occupation. A sub-panel titled "Accident Violation" is open, showing a list of drivers (1) and the current driver (JACK FROST). The "Accident Violation" tab is highlighted with a red box. This sub-panel has "SAVE" and "CANCEL" buttons. Below these are fields for Type (Accident (Not-at-fault)), Violation Date (03/03/1990), Conviction Date, Surcharge (checked), Points (0), and Source (Manual).

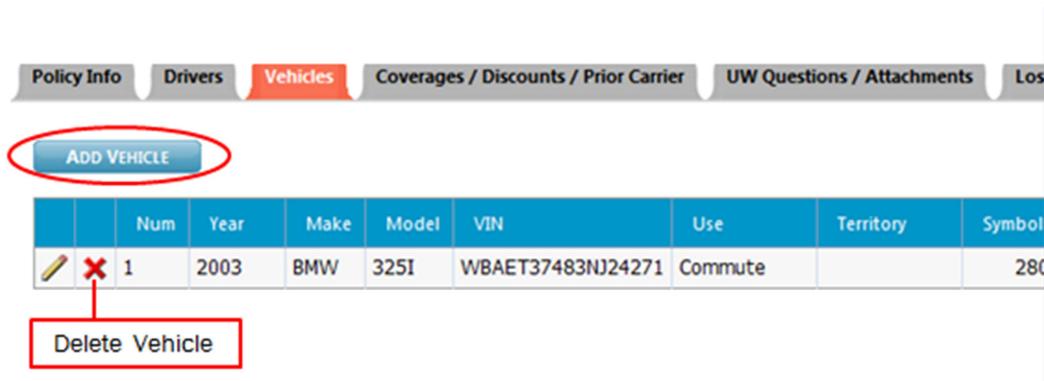
Vehicle

9. Adding Vehicles

- Add Vehicle – Click “Add Vehicle”.
- Enter Vehicle Information, Click “Save Vehicle”

10. Delete Vehicle – Click on the “X” to the left of the vehicle.

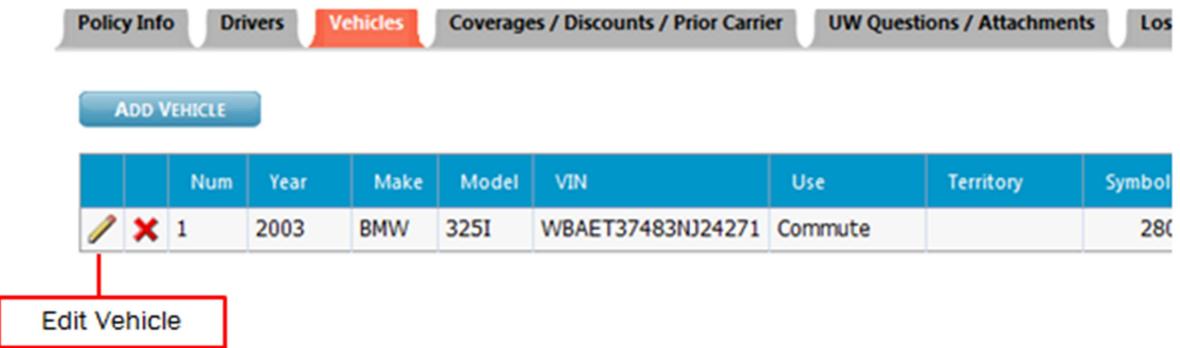
- Enter Vehicle Information, Click “Save Vehicle”



	Num	Year	Make	Model	VIN	Use	Territory	Symbol
	X 1	2003	BMW	325I	WBAET37483NJ24271	Commute		280

Delete Vehicle

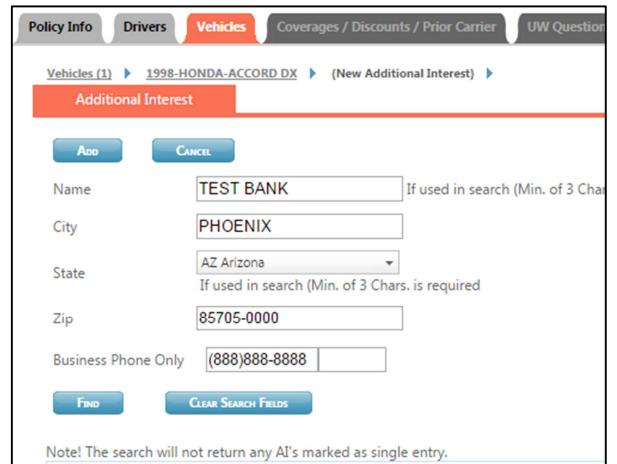
11. Editing Vehicle - Click the pencil to the left of the vehicle. All vehicle information must be updated to include accurate information by using the Edit option.



	Num	Year	Make	Model	VIN	Use	Territory	Symbol
	X 1	2003	BMW	325I	WBAET37483NJ24271	Commute		280

Edit Vehicle

- Enter usage type for vehicle
- Additional Interest – To add an additional interest, click on the pencil. From the Additional Interest tab, enter all information.
Quick Tip: To access the list of existing loss payees, click 'Find' at the bottom of the tab.
- Garaging Address – To add a garaging address, click on the pencil. From the Garaging Address tab, enter all information. **If mailing address is a P.O. Box, a valid physical address must be included**
- Any vehicle damage indicated must include a description.



Additional Interest

Name: TEST BANK
City: PHOENIX
State: AZ Arizona
Zip: 85705-0000
Business Phone Only: (888)888-8888

FIND CLEAR SEARCH FIELDS

Note! The search will not return any AI's marked as single entry.

Coverages / Discounts/ Prior Carrier

12. All coverage, discount and prior carrier information must be updated to include accurate information.

- When quoting coverage for multiple vehicles, use the “Select” option to the left of the vehicle to apply Vehicle Level coverages.

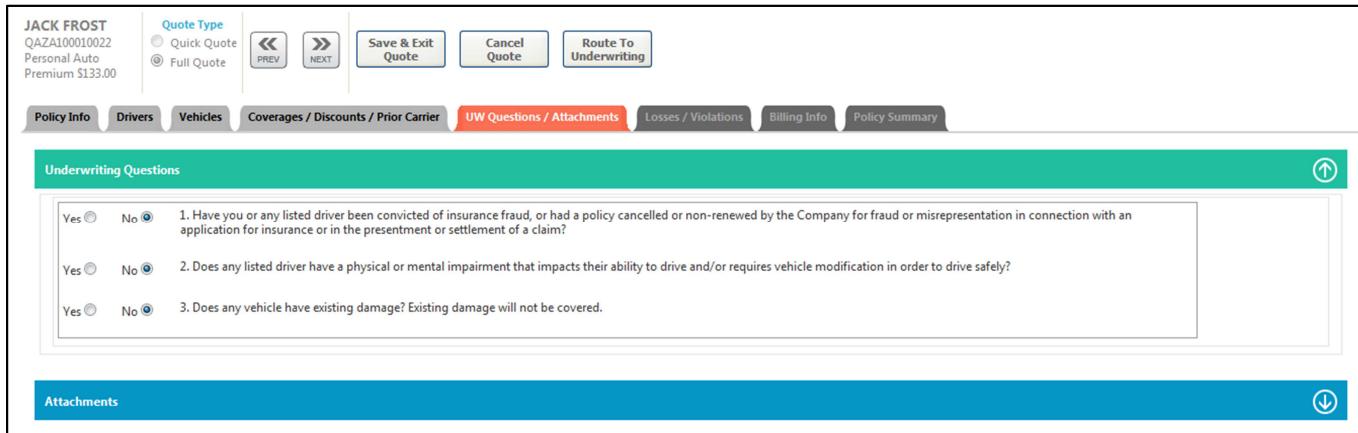
Coverages																															
Bodily Injury	15,000/30,000	Property Damage	10,000	Medical Payments	No Coverage	UMBI	No Coverage																								
					UMBI	No Coverage	No Coverage																								
Vehicle Basic Information																															
<table border="1"> <thead> <tr> <th></th> <th>Num</th> <th>Year</th> <th>Make</th> <th>Model</th> <th>Body Type</th> <th>Vin</th> <th>Non Owned</th> </tr> </thead> <tbody> <tr> <td>Select</td> <td>1</td> <td>2005</td> <td>CHEVROLET</td> <td>SILVERADO 1500 BASE/LS/LT/Z71</td> <td>Pickup</td> <td>2GCEC13T651380546</td> <td>No</td> </tr> <tr> <td>Select</td> <td>2</td> <td>2003</td> <td>FORD</td> <td>RANGER SUPER CAB</td> <td>Pickup</td> <td>1FTZR45E83PB46134</td> <td>No</td> </tr> </tbody> </table>									Num	Year	Make	Model	Body Type	Vin	Non Owned	Select	1	2005	CHEVROLET	SILVERADO 1500 BASE/LS/LT/Z71	Pickup	2GCEC13T651380546	No	Select	2	2003	FORD	RANGER SUPER CAB	Pickup	1FTZR45E83PB46134	No
	Num	Year	Make	Model	Body Type	Vin	Non Owned																								
Select	1	2005	CHEVROLET	SILVERADO 1500 BASE/LS/LT/Z71	Pickup	2GCEC13T651380546	No																								
Select	2	2003	FORD	RANGER SUPER CAB	Pickup	1FTZR45E83PB46134	No																								
Vehicle Level Coverages for 2005 CHEVROLET SILVERADO 1500 BASE/LS/LT/Z71 [Use Previous Vehicle]																															
Comprehensive	No Coverage	Towing and Labor	No Coverage	Safety Glass	<input type="checkbox"/>																										
Collision	No Coverage	Rental Reimbursement	No Coverage	Custom Equipment	Count: 0																										

- If Prior Insurance or In Agency Transfer discount has been added to the policy, the prior carrier information must be included.
- If Prior Carrier information cannot be validated, proof of prior insurance must be attached in the UW Questions/Attachments section.
- If a Homeowners discount has been applied, proof of homeownership must be attached in the UW Questions/Attachments section.

Vehicle Level Coverages for 2003 BMW 325I							
Comprehensive	No Coverage	Towing and Labor	No Coverage	Safety Glass	<input type="checkbox"/>		
Collision	No Coverage	Rental Reimbursement	No Coverage	Custom Equipment	Count: 0		
Discounts							
Discounts Prior Insurance <input type="text"/> Homeownership <input checked="" type="checkbox"/> Recurring Payment <input type="checkbox"/> Paid in Full <input type="checkbox"/> Multi Car <input type="checkbox"/> Multi-Policy <input type="checkbox"/> Advanced Quote <input type="checkbox"/>							
Linked Policies							
No Linked Policies							
Prior Carrier							
*Previous Insurer	<input type="text"/>						
Months of Prior Coverage	<input type="text" value="0"/>						
Policy Number	<input type="text"/>						
Expiration Date	<input type="text"/>						
Remarks	<input type="text"/>						

UW Questions/ Attachments

13. Answer all UW questions.



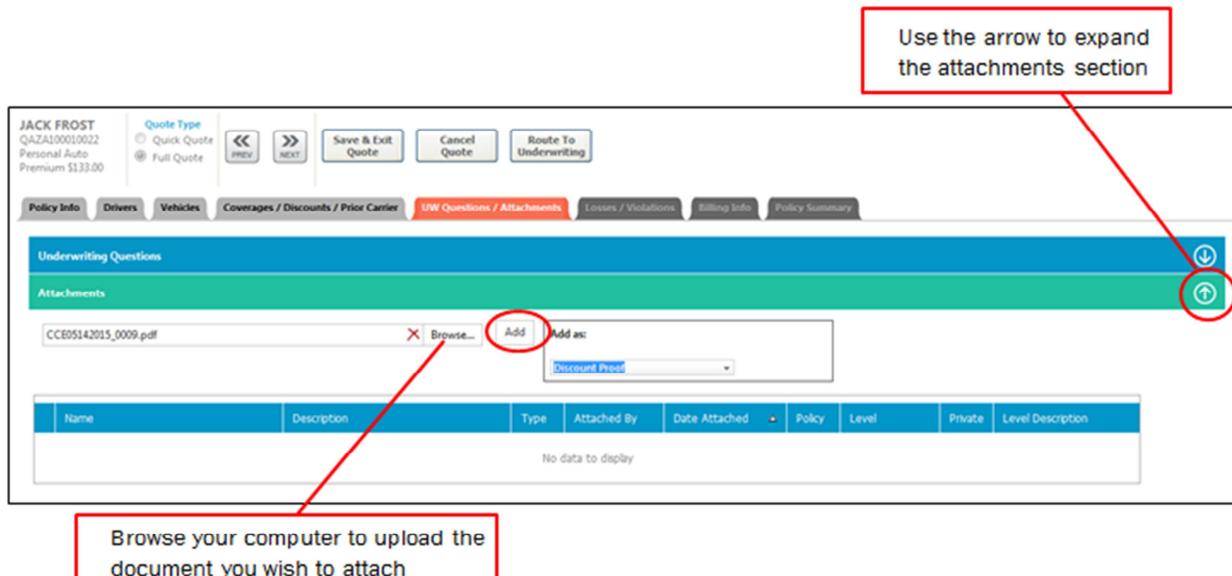
The screenshot shows the software interface for policy number QAZA100010022. At the top, there are buttons for 'Quote Type' (Quick Quote or Full Quote), navigation arrows ('PREV' and 'NEXT'), and actions like 'Save & Exit Quote', 'Cancel Quote', and 'Route To Underwriting'. Below this is a navigation bar with tabs: Policy Info, Drivers, Vehicles, Coverages / Discounts / Prior Carrier, UW Questions / Attachments (which is highlighted in red), Losses / Violations, Billing Info, and Policy Summary. The main content area is titled 'Underwriting Questions' and contains three questions with 'Yes' or 'No' radio buttons:

1. Have you or any listed driver been convicted of insurance fraud, or had a policy cancelled or non-renewed by the Company for fraud or misrepresentation in connection with an application for insurance or in the presentment or settlement of a claim?
2. Does any listed driver have a physical or mental impairment that impacts their ability to drive and/or requires vehicle modification in order to drive safely?
3. Does any vehicle have existing damage? Existing damage will not be covered.

At the bottom of the screen is a blue bar labeled 'Attachments' with a downward arrow icon.

14. If any supporting documents are required:

- Click the down arrow on the right side of the page to expand this section.
- Click "Browse" to locate the document
- Select "Add As" to select document type.



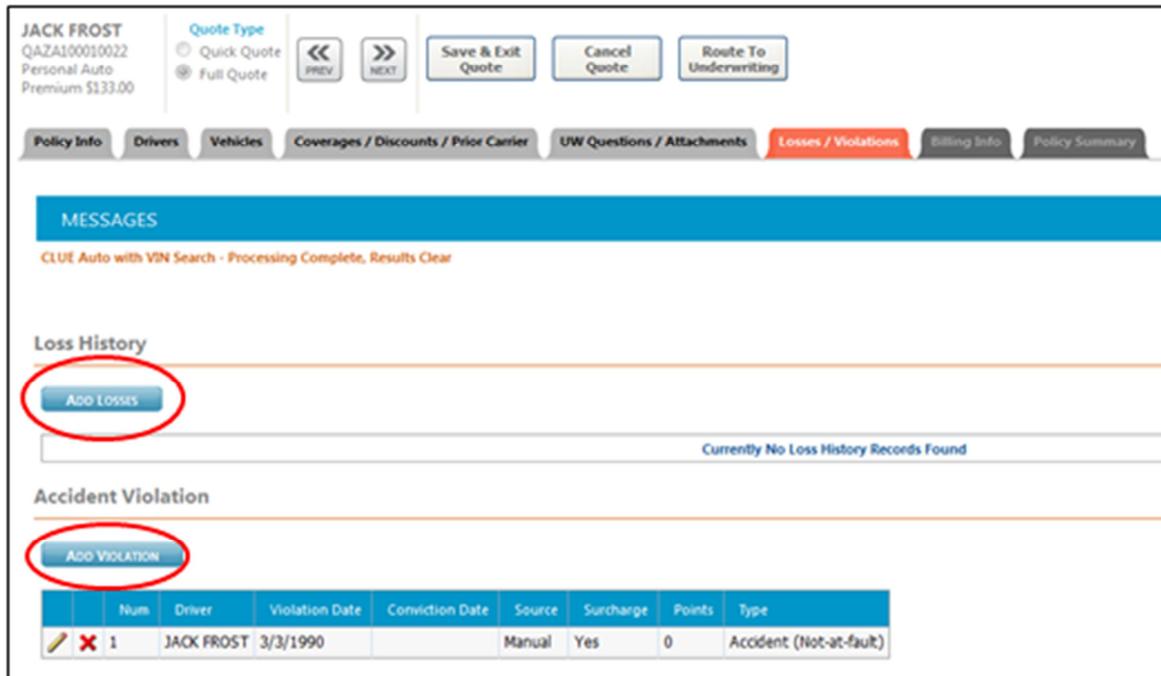
The screenshot shows the same software interface as above, but the 'Attachments' section is now expanded, indicated by a red box and an upward arrow icon on the right. The 'Attachments' tab is also highlighted in red. In the attachments section, there is a file listed: 'CCE05142015_0009.pdf'. Next to it are buttons for 'X' (Delete), 'Browse...', 'Add' (circled in red), and 'Add as:' with a dropdown menu showing 'Discount Proof'. A red box highlights the 'Add' button. Below this is a table with columns: Name, Description, Type, Attached By, Date Attached, Policy, Level, Private, and Level Description. The message 'No data to display' is shown at the bottom of the table.

A red box with the text 'Browse your computer to upload the document you wish to attach' points to the 'Browse...' button.

Losses/Violations

15. Review returned messages and click on either “Loss History” or “Accident Violation” to make necessary changes.

- Addition of losses and violations can also be entered manually.
 - CLUE/MVR returned losses/violations cannot be removed.



JACK FROST
QAZA100010022
Personal Auto
Premium \$133.00

Quote Type
 Quick Quote
 Full Quote PREV NEXT Save & Exit Quote Cancel Quote Route To Underwriting

Policy Info Drivers Vehicles Coverages / Discounts / Prior Carrier UW Questions / Attachments **Losses / Violations** Billing Info Policy Summary

MESSAGES
CLUE Auto with VIN Search - Processing Complete, Results Clear

Loss History

Add Losses

Currently No Loss History Records Found

Accident Violation

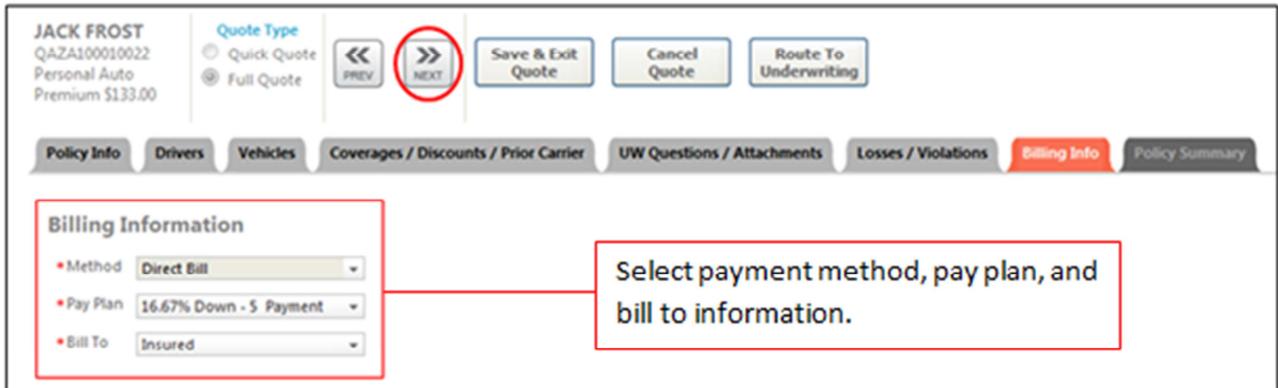
Add VIOLATION

	Num	Driver	Violation Date	Conviction Date	Source	Surcharge	Points	Type
		1 JACK FROST	3/3/1990		Manual	Yes	0	Accident (Not-at-fault)

Billing Info

16. Select the Method of Billing, Pay Plan, and Bill To Information.

17. When done, click the “Next” button at the top of the screen.



JACK FROST
QAZA100010022
Personal Auto
Premium \$133.00

Quote Type
 Quick Quote
 Full Quote PREV **NEXT** Save & Exit Quote Cancel Quote Route To Underwriting

Policy Info Drivers Vehicles Coverages / Discounts / Prior Carrier UW Questions / Attachments Losses / Violations **Billing Info** Policy Summary

Billing Information

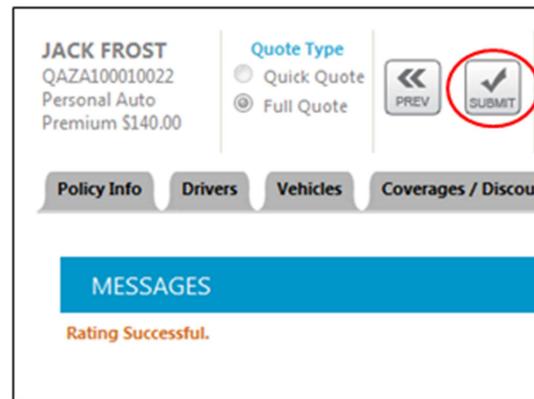
*Method: Direct Bill
 *Pay Plan: 16.67% Down - 5 Payment
 *Bill To: Insured

Select payment method, pay plan, and bill to information.

Policy Summary

18. Validation Messages

- Any underwriting or rating validations must be addressed before policy will rate.
- TIP: Yellow or orange messages are warning. Red messages must be addressed in order to complete the application.**
- If a vehicle has physical damage indicated, a description must be included before binding will be allowed



JACK FROST
QAZA100010022
Personal Auto
Premium \$140.00

Quote Type
 Quick Quote
 Full Quote
 PREV SUBMIT

Policy Info Drivers Vehicles Coverages / Discount

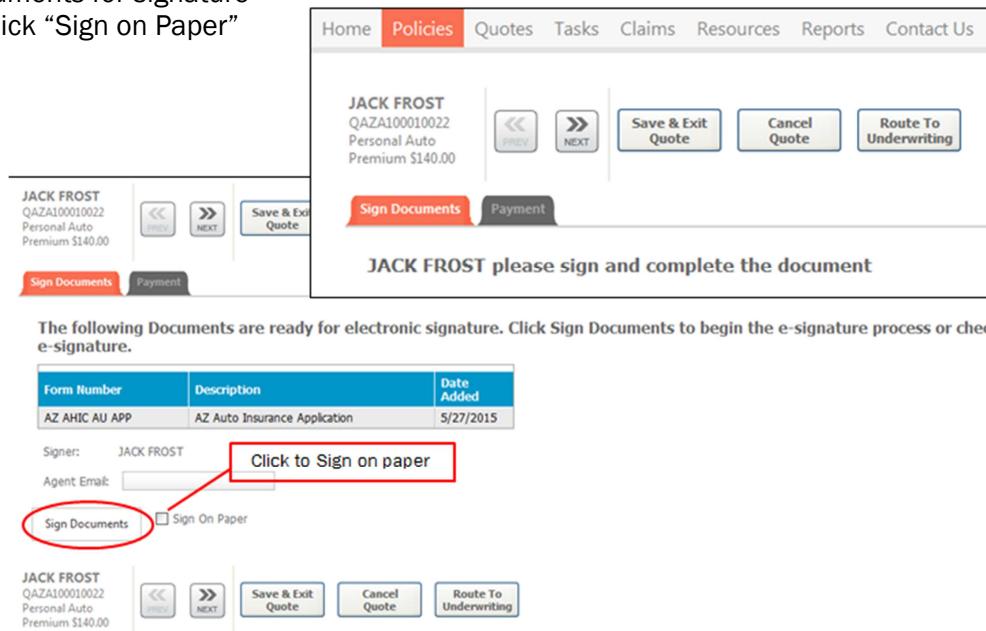
MESSAGES
Rating Successful.

19. Verify Pay Plan, Down Payment and Monthly Premium

20. Click "Submit" button to bind policy. Do not click submit until you are ready to bind – no changes can be processed to the quote once the submission process starts.

21. Once the application has been submitted, the documents will be ready for signature

- E-Signature
 - Enter valid agent email address
 - Click "Sign Documents" to initiate the E-Signature process
- Print documents for signature
 - Click "Sign on Paper"



JACK FROST
QAZA100010022
Personal Auto
Premium \$140.00

PREV NEXT Save & Exit Quote Cancel Quote Route To Underwriting

Sign Documents Payment

JACK FROST please sign and complete the document

Form Number	Description	Date Added
AZ AHIC AU APP	AZ Auto Insurance Application	5/27/2015

The following Documents are ready for electronic signature. Click Sign Documents to begin the e-signature process or check e-signature.

Signer: JACK FROST
Agent Email:
[Click to Sign on paper](#)

Sign Documents Sign On Paper

JACK FROST
QAZA100010022
Personal Auto
Premium \$140.00

PREV NEXT Save & Exit Quote Cancel Quote Route To Underwriting

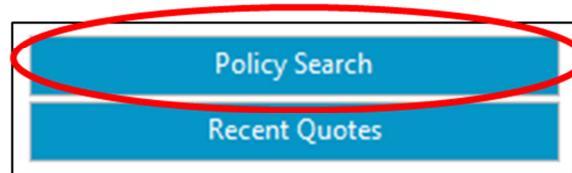
- If E-Signature process was selected the following process will begin
 - Pass keyboard control to the applicant and follow the onscreen prompts to complete all signatures.
 - Print policy documents, once the applicant and agent have applied signatures.

Policy Changes

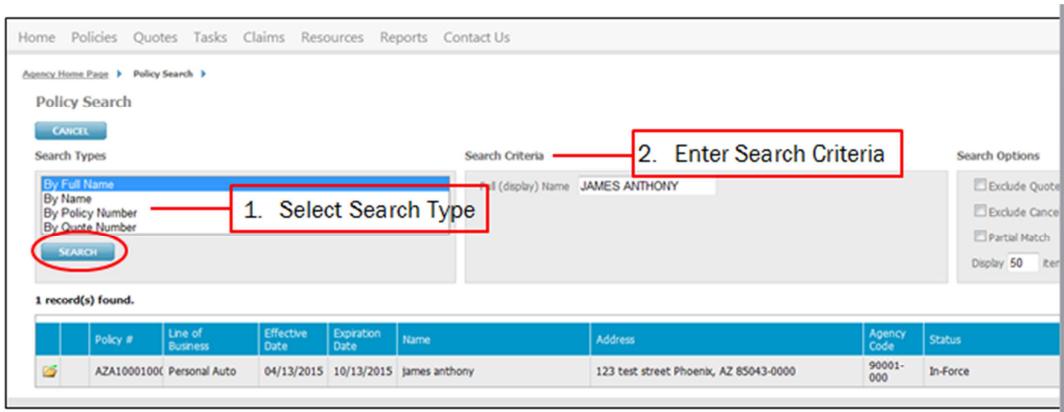
To process a Policy Change

1. To search for a policy, click on the Policy Search bar located on the home screen.

2. Select the method of search under the Search Types, including the following options.
- By Full Name
 - By Name
 - By Policy Number
 - By Quote Number



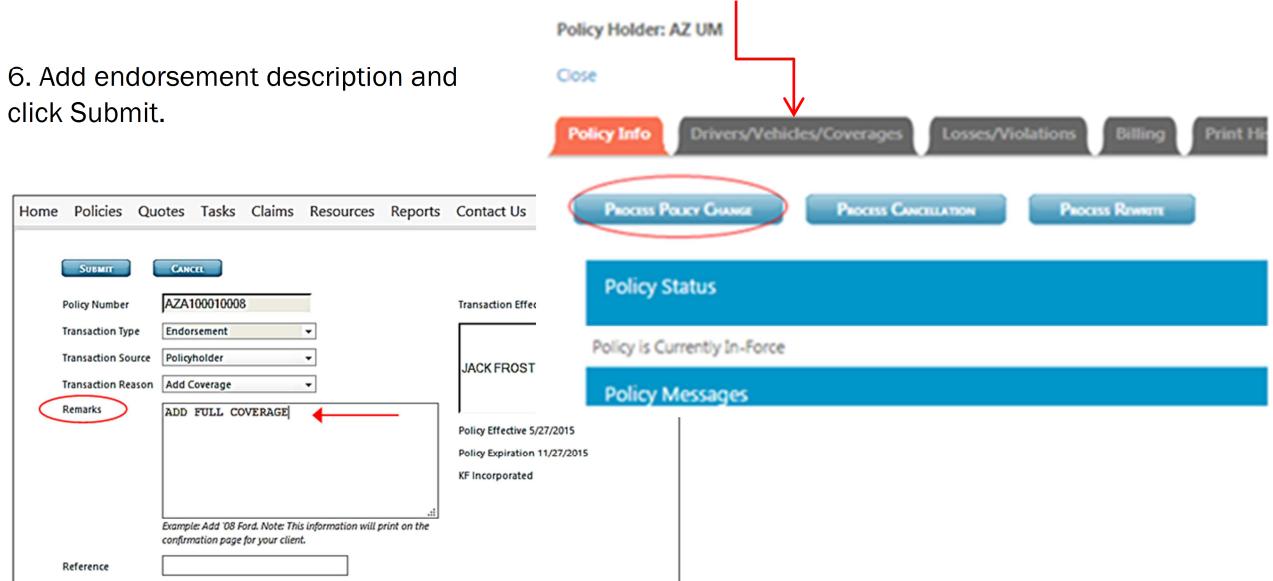
3. In this example, a search is being performed by Full Name. A partial name search can be performed. Any portion of the insured information can be entered in the appropriate fields, then click the Search button.



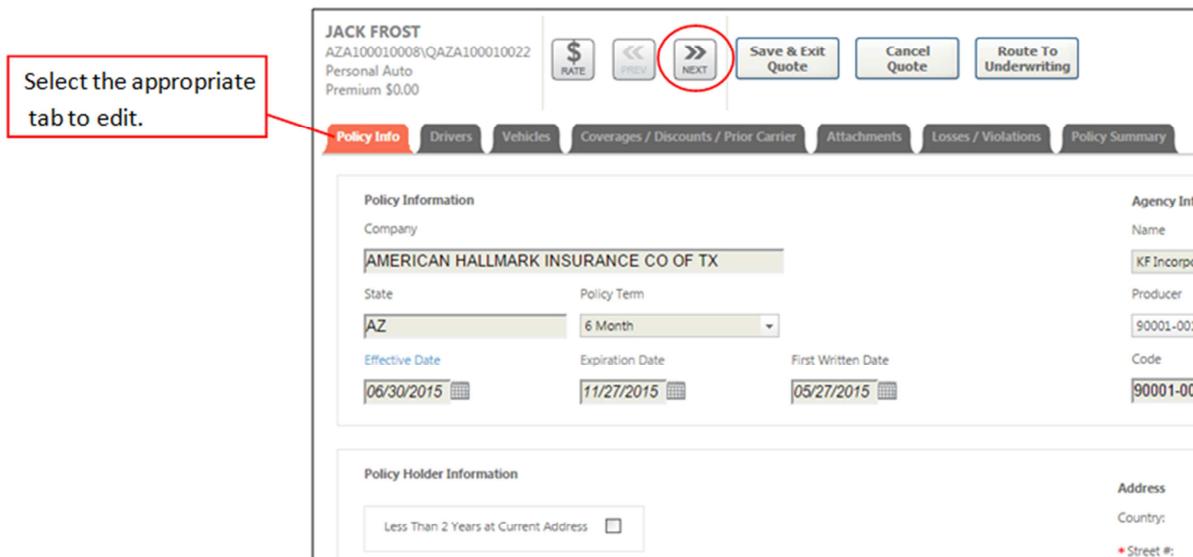
	Policy #	Line of Business	Effective Date	Expiration Date	Name	Address	Agency Code	Status
	AZA1000100K	Personal Auto	04/13/2015	10/13/2015	James anthony	123 test street Phoenix, AZ 85043-0000	90001-000	In-Force

4. Click on yellow folder to the left of the policy number to load the policy for review.

5. Initiate policy change by selecting Process Policy Change.



7. Make policy changes by clicking on appropriate tab. When done, click “Next” to validate information on each tab or click “Rate” to complete quote.



JACK FROST
AZA100010008/QAZA100010022
Personal Auto
Premium \$0.00

\$ RATE << PREV >> NEXT Save & Exit Quote Cancel Quote Route To Underwriting

Policy Info Drivers Vehicles Coverages / Discounts / Prior Carrier Attachments Losses / Violations Policy Summary

Policy Information

Company
AMERICAN HALLMARK INSURANCE CO OF TX

State Policy Term
AZ 6 Month

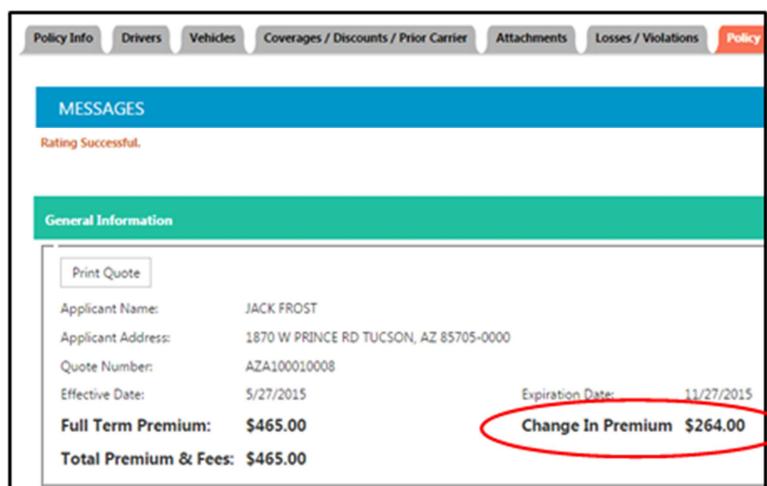
Effective Date Expiration Date First Written Date
06/30/2015 **11/27/2015** **05/27/2015**

Policy Holder Information

Less Than 2 Years at Current Address

Agency Info
Name: KF Incorp...
Producer: 90001-001
Code: 90001-00
Address:
Country:
Street #:

8. If applicable, inform insured of Change in Premium and when done, click on the Submit button to process change.



MESSAGES
Rating Successful.

General Information

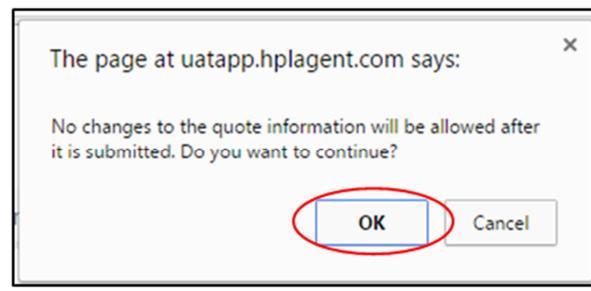
Print Quote

Applicant Name: JACK FROST
Applicant Address: 1870 W PRINCE RD TUCSON, AZ 85705-0000
Quote Number: AZA100010008
Effective Date: 5/27/2015 Expiration Date: 11/27/2015
Full Term Premium: \$465.00 Change In Premium \$264.00
Total Premium & Fees: \$465.00

9. No changes to the quote are permitted after submitting. Acknowledge by clicking “OK”.

10. Proceed with DocuSign Process or Print Forms for manual signatures if signature to change is required.

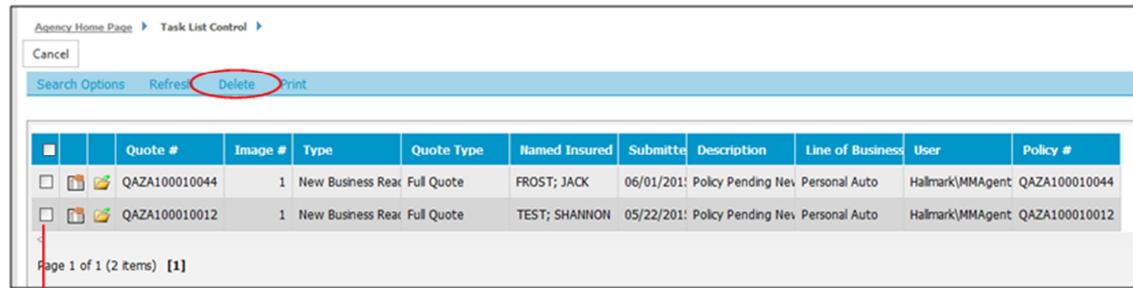
11. If payment is required, confirm payment amount, select Payment Method and click “Submit Payment”.



Deleting Pending Endorsements

Pending policy endorsements can be removed. Policy effective dates cannot be changed.

1. Click on Recent Quotes
2. Click the box to the left of the Quote to be deleted then Click on the text Delete located in the light blue menu bar

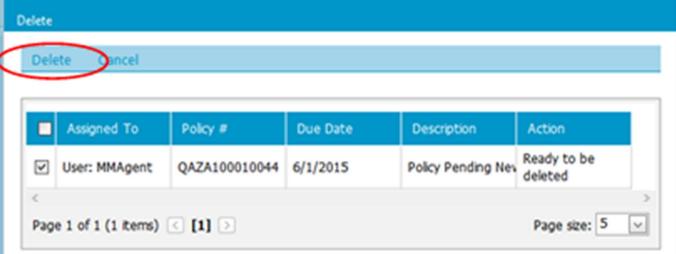



	Quote #	Image #	Type	Quote Type	Named Insured	Submitted	Description	Line of Business	User	Policy #
<input type="checkbox"/>	QAZA100010044	1	New Business Rear	Full Quote	FROST; JACK	06/01/2011	Policy Pending Nev	Personal Auto	Halmark MMAgent	QAZA100010044
<input type="checkbox"/>	QAZA100010012	1	New Business Rear	Full Quote	TEST; SHANNON	05/22/2011	Policy Pending Nev	Personal Auto	Halmark MMAgent	QAZA100010012

Page 1 of 1 (2 items) [1]

Select the ballot box next to the quote to be deleted.

3. Confirm by clicking Delete again.



	Assigned To	Policy #	Due Date	Description	Action
<input checked="" type="checkbox"/>	User: MMAgent	QAZA100010044	6/1/2015	Policy Pending Nev	Ready to be deleted

Page 1 of 1 (1 items) [1] >

Page size: 5

Tip: A new endorsement may not be quoted or issued if there is currently an outstanding pending endorsement.

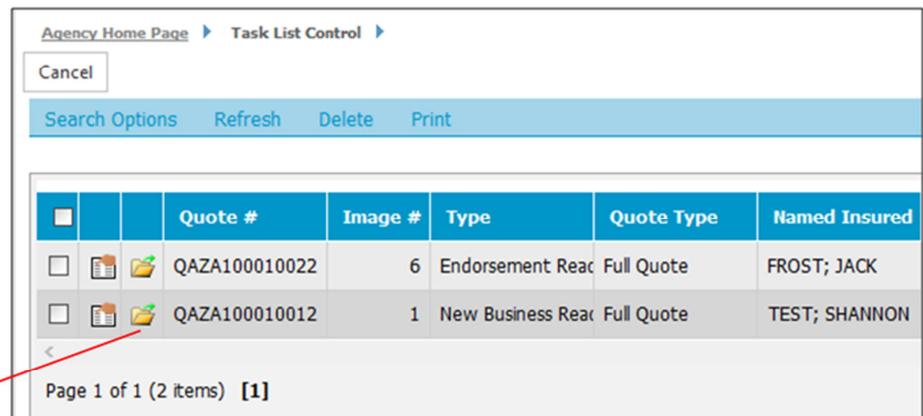
Modifying Pending Endorsements

Pending policy endorsements can be modified. Policy effective dates cannot be changed.

1. Click on Recent Quotes



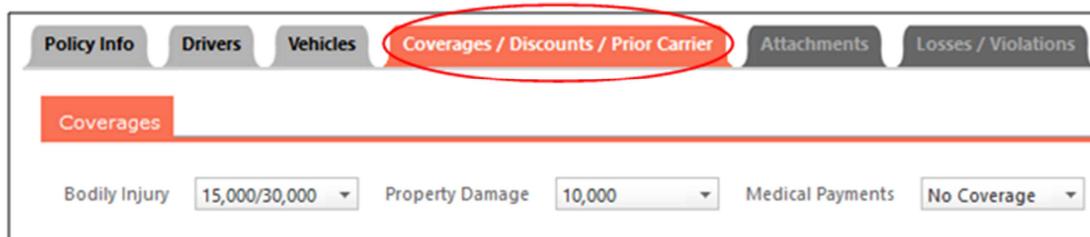
Select the folder next to the quote to be modified.



	Quote #	Image #	Type	Quote Type	Named Insured
<input type="checkbox"/>	QAZA100010022	6	Endorsement Read	Full Quote	FROST; JACK
<input type="checkbox"/>	QAZA100010012	1	New Business Read	Full Quote	TEST; SHANNON

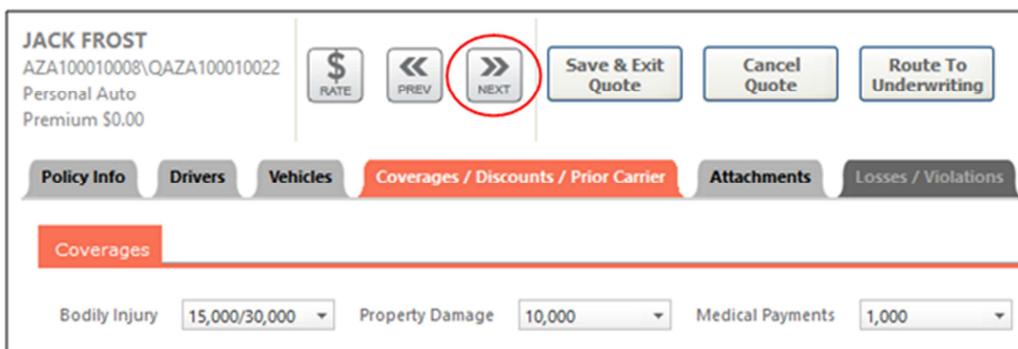
Page 1 of 1 (2 items) [1]

2. Select tab to make preferred changes.



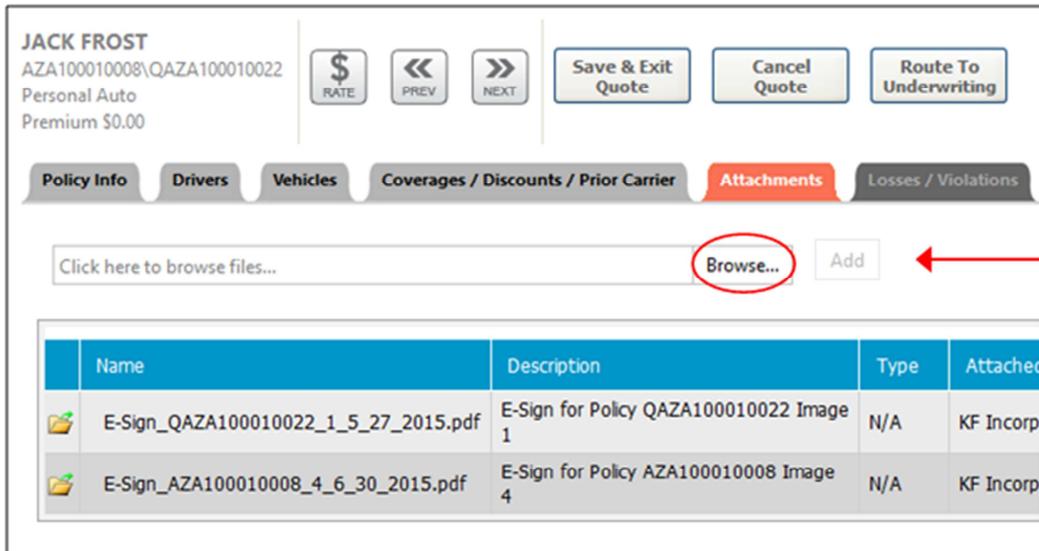
Bodily Injury	15,000/30,000	Property Damage	10,000	Medical Payments	No Coverage
---------------	---------------	-----------------	--------	------------------	-------------

3. When done with changes click Next



JACK FROST AZA100010008/QAZA100010022 Personal Auto Premium \$0.00	\$ RATE	PREV	NEXT	Save & Exit Quote	Cancel Quote	Route To Underwriting
Coverages						
Bodily Injury	15,000/30,000	Property Damage	10,000	Medical Payments	1,000	

4. Attach any supporting documents by clicking the Browse button. Locate the document then click Add. When done, click Next to confirm information throughout each tab.



JACK FROST
 AZA100010008\QAZA100010022
 Personal Auto
 Premium \$0.00

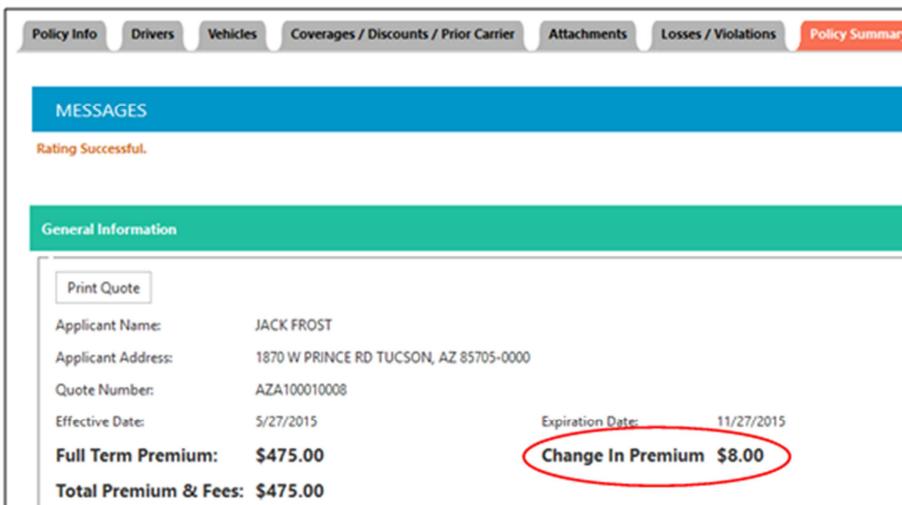
\$ RATE PREV NEXT Save & Exit Quote Cancel Quote Route To Underwriting

Policy Info Drivers Vehicles Coverages / Discounts / Prior Carrier **Attachments** Losses / Violations

Click here to browse files... **Browse...** Add ←

	Name	Description	Type	Attached
	E-Sign_QAZA100010022_1_5_27_2015.pdf	E-Sign for Policy QAZA100010022 Image 1	N/A	KF Incorp
	E-Sign_AZA100010008_4_6_30_2015.pdf	E-Sign for Policy AZA100010008 Image 4	N/A	KF Incorp

5. Inform insured of Change in Premium and when done, click on the Submit button.



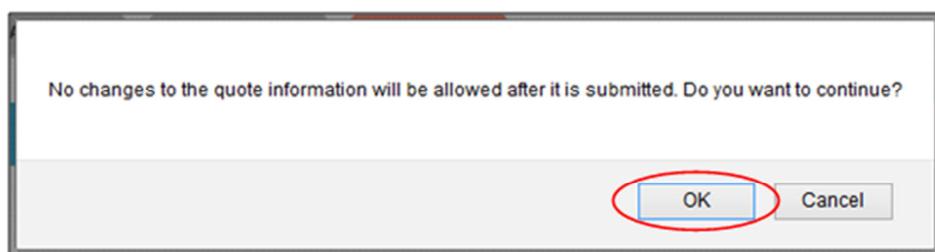
MESSAGES
 Rating Successful.

General Information

Print Quote

Applicant Name: JACK FROST
 Applicant Address: 1870 W PRINCE RD TUCSON, AZ 85705-0000
 Quote Number: AZA100010008
 Effective Date: 5/27/2015 Expiration Date: 11/27/2015
 Full Term Premium: \$475.00 **Change In Premium \$8.00**
 Total Premium & Fees: \$475.00

6. No changes to the quote are permitted after submitting. Acknowledge by clicking OK



7. Click Next if No E-Signature forms are required. If E-Signature forms are required then the DocuSign process will begin.



The screenshot shows a quote summary for "JACK FROST" with policy number AZA100010008\QAZA100010022. The "Personal Auto" coverage has a Premium of \$475.00. Below the summary are four buttons: "PREV", "NEXT" (which is circled in red), "Save & Exit Quote", and "Route To Underwriting". Below these buttons are three tabs: "Sign Documents" (highlighted in red), "Payment", and "Confirmation". A message box at the bottom states: "No E-Signature forms to sign. Please proceed."

8. After clicking Next, upload any required payment, select Payment Method, and click Submit Payment.

Reinstatements, Rewrites, and Cancellations

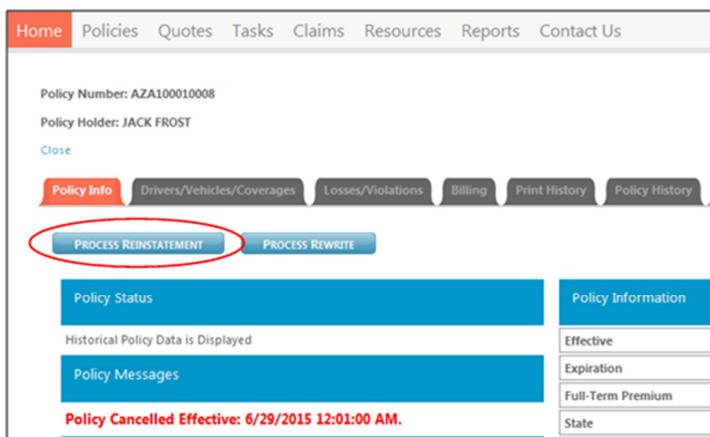
Reinstatement With and Without a Lapse

1. From the Daily Action Items section, locate Recently Cancelled Policies and click arrow on the right to un-collapse the list. Click on policy number within the appropriate reinstatement sub-category.



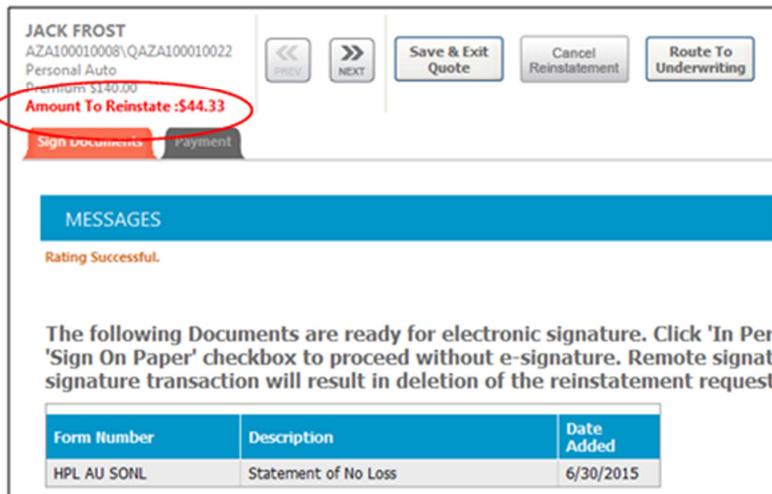
The screenshot shows the "Daily Action Items" section. It lists "Policies Pending Cancellation (2)" and "Recently Cancelled Policies (12)". The "Recently Cancelled Policies" section has a downward arrow icon on its right side, which is circled in red.

2. Select Process Reinstatement



The screenshot shows the "Policy Info" tab selected. At the top, it displays "Policy Number: AZA100010008" and "Policy Holder: JACK FROST". Below this is a "Policy Status" section stating "Historical Policy Data is Displayed". In the center, there are two columns: "Policy Information" (with fields for Effective, Expiration, Full-Term Premium, and State) and "Policy Messages" (containing the message "Policy Cancelled Effective: 6/29/2015 12:01:00 AM."). At the bottom of the page, there are two buttons: "PROCESS REINSTATEMENT" (circled in red) and "PROCESS REWRITE".

3. Inform the insured of the amount needed to reinstate. If electronically signing, enter agents email to initiate process or click “Sign on Paper” to print.



JACK FROST
 AZA100010008\QAZA100010022
 Personal Auto
 Premium \$140.00
Amount To Reinstate :\$44.33

Save & Exit Quote Cancel Reinstatement Route To Underwriting

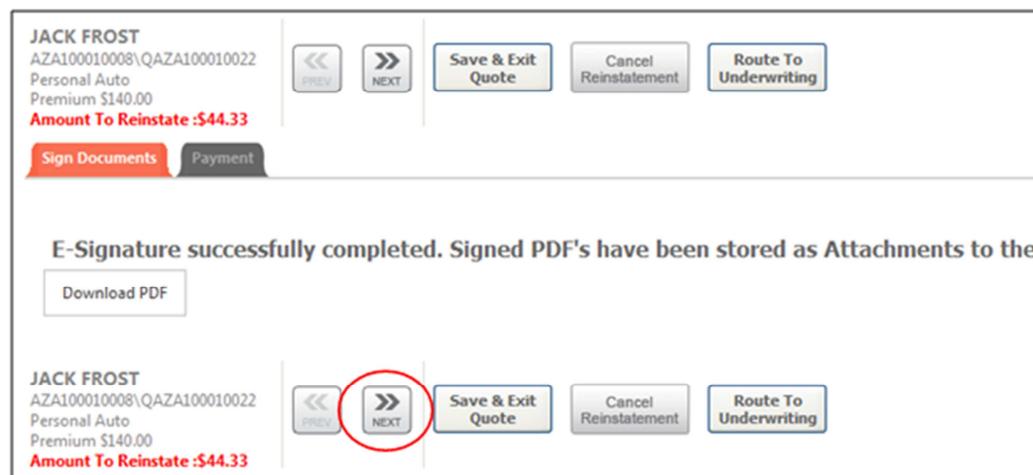
Sign Documents Payment

MESSAGES
 Rating Successful.

The following Documents are ready for electronic signature. Click 'In Person' 'Sign On Paper' checkbox to proceed without e-signature. Remote signature transaction will result in deletion of the reinstatement request

Form Number	Description	Date Added
HPL AU SONL	Statement of No Loss	6/30/2015

4. If electronically signing, once DocuSign process is complete, a message will appear. Click “Next” button to continue. When selecting “Remote Esign” for the Statement of No Loss, the signature process must be completed the same day.



JACK FROST
 AZA100010008\QAZA100010022
 Personal Auto
 Premium \$140.00
Amount To Reinstate :\$44.33

Save & Exit Quote Cancel Reinstatement Route To Underwriting

Sign Documents Payment

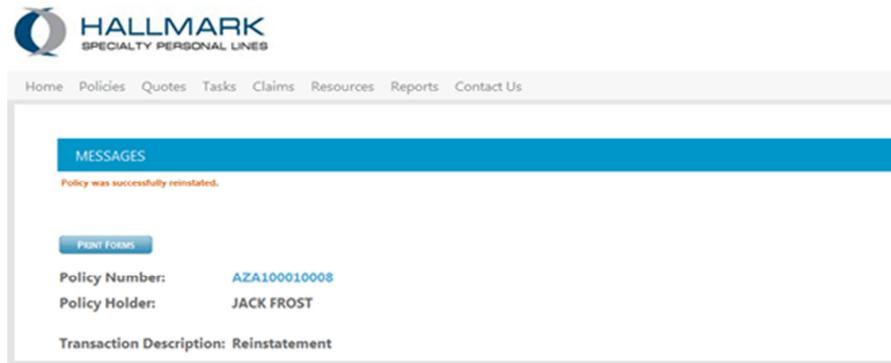
E-Signature successfully completed. Signed PDF's have been stored as Attachments to the Insurance Policy.

Download PDF

JACK FROST
 AZA100010008\QAZA100010022
 Personal Auto
 Premium \$140.00
Amount To Reinstate :\$44.33

PREV **NEXT** Save & Exit Quote Cancel Reinstatement Route To Underwriting

5. Select preferred method of payment and click “Submit Payment”.
6. Policy is now reinstated.



HALLMARK
 SPECIALTY PERSONAL LINES

Home Policies Quotes Tasks Claims Resources Reports Contact Us

MESSAGES
 Policy was successfully reinstated.

PRINT FORMS

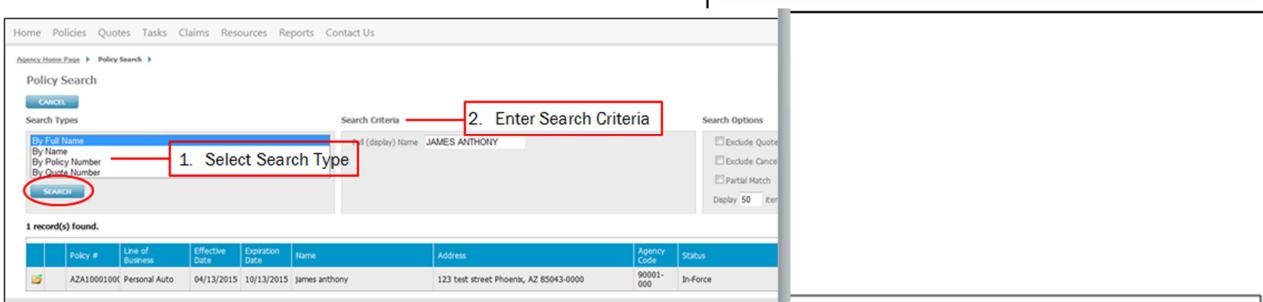
Policy Number: AZA100010008
 Policy Holder: JACK FROST

Transaction Description: Reinstatement

Processing a Rewrite

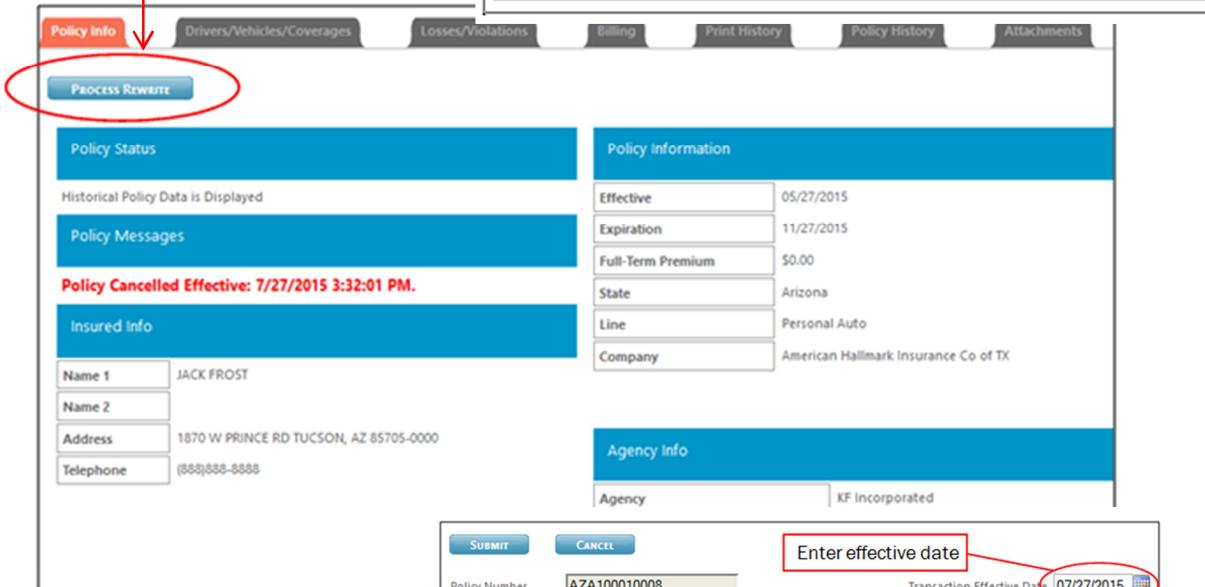
To process a rewrite from a cancelled or existing policy:

1. Click "Policy Search"
2. Enter Search Criteria and click "Search"



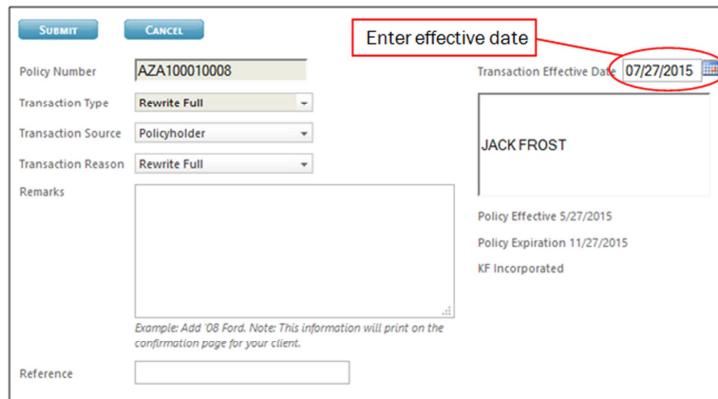
Policy #	Line of Business	Effective Date	Expiration Date	Name	Address	Agency Code	Status
AZA10001000	Personal Auto	04/13/2015	10/13/2015	james anthony	123 test street Phoenix, AZ 85043-0000	90001-000	In-Force

3. Click on yellow folder to view policy
4. Click on Process Rewrite



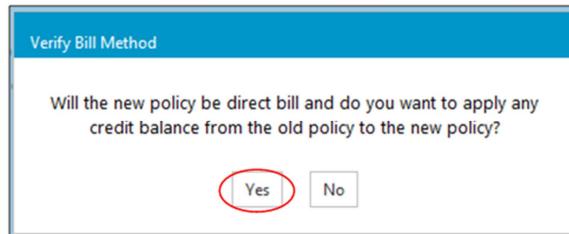
Policy #	Line of Business	Effective Date	Expiration Date	Name
AZA10001000	Personal Auto	05/27/2015	11/27/2015	JACK FROST
QAZA1000100	Personal Auto	06/01/2015	12/01/2015	JACK FROST

5. Enter Future Transaction Effective Date if other than current date, select Transaction Source, and click Submit.



Policy Effective 5/27/2015
Policy Expiration 11/27/2015
KF Incorporated

6. Confirm Bill Method and if credit balance should apply to new policy.

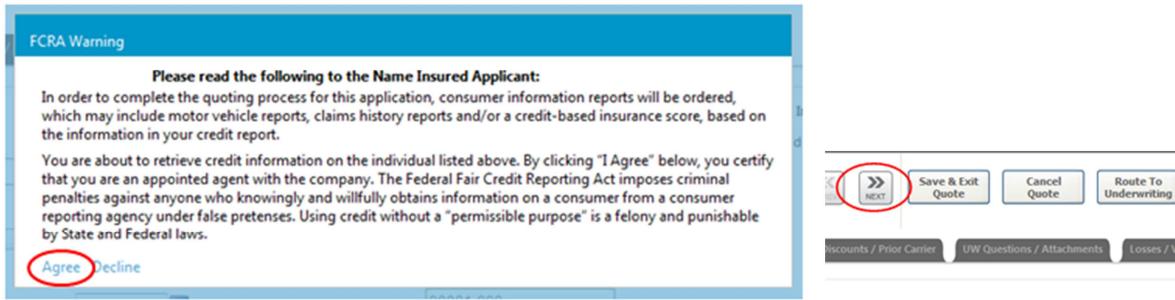


Verify Bill Method

Will the new policy be direct bill and do you want to apply any credit balance from the old policy to the new policy?

7. Continue with rewrite process by reading FCRA Warning to policyholder and selecting Agree or Decline.

* Declining the FCRA Warning will close the quote. The quote will remain in your Recent Quotes list if you decide to continue later.



FCRA Warning

Please read the following to the Name Insured Applicant:

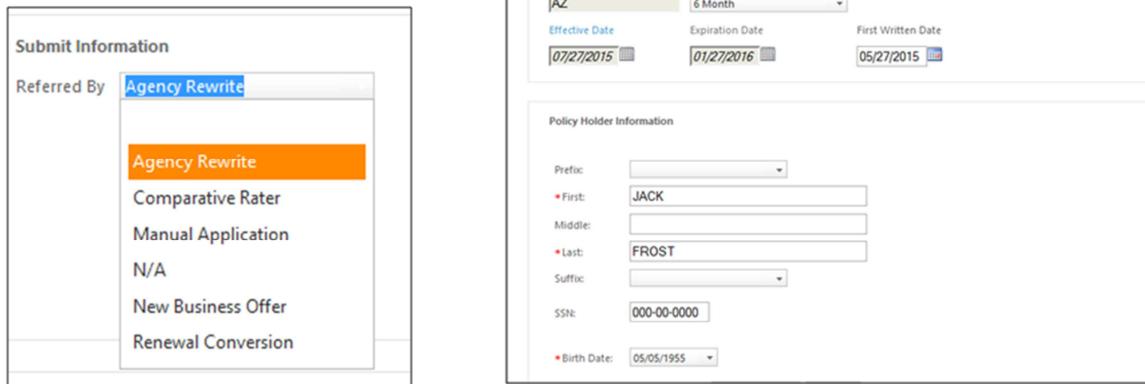
In order to complete the quoting process for this application, consumer information reports will be ordered, which may include motor vehicle reports, claims history reports and/or a credit-based insurance score, based on the information in your credit report.

You are about to retrieve credit information on the individual listed above. By clicking "I Agree" below, you certify that you are an appointed agent with the company. The Federal Fair Credit Reporting Act imposes criminal penalties against anyone who knowingly and willfully obtains information on a consumer from a consumer reporting agency under false pretenses. Using credit without a "permissible purpose" is a felony and punishable by State and Federal laws.

Save & Exit Quote Cancel Route To Underwriting

Discounts / Prior Carrier UW Questions / Attachments Losses / Vi

8. Select Referred By on the Full Quote



Submit Information

Referred By

Agency Rewrite
Comparative Rater
Manual Application
N/A
New Business Offer
Renewal Conversion

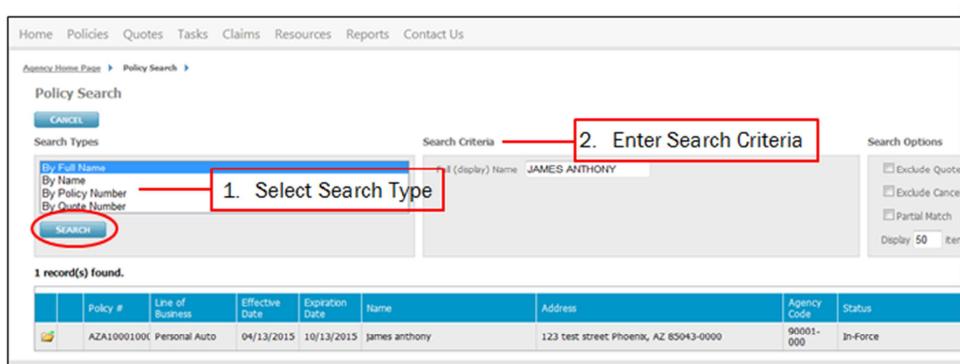
Company	AMERICAN HALLMARK INSURANCE CO OF TX	
State	Policy Term	
AZ	6 Month	
Effective Date	Expiration Date	First Written Date
07/27/2015	01/27/2016	05/27/2015
Policy Holder Information		
Prefix:		
First:	JACK	
Middle:		
Last:	FROST	
Suffix:		
SSN:	000-00-0000	
Birth Date:	05/05/1955	

Screen then continue with confirming all policy information by reviewing each screen and clicking Next. Policy will be issued at the end of process as usual.

Processing a Cancellation

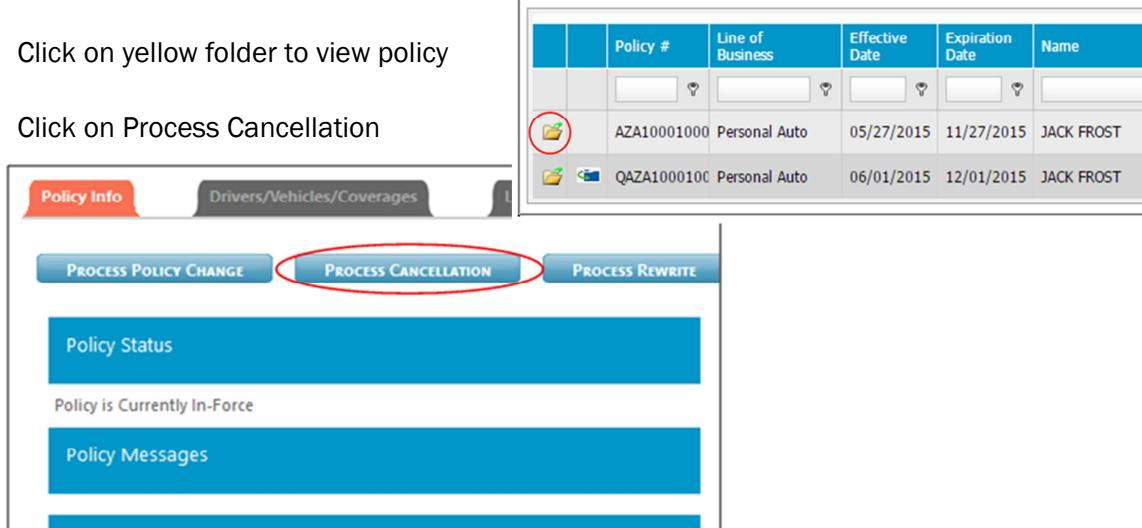
To process a cancellation at the request of the policyholder

1. Click "Policy Search"
2. Enter Search Criteria and click "Search"

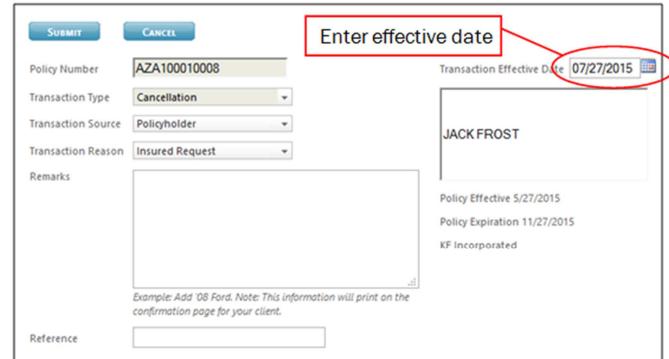
	Policy #	Line of Business	Effective Date	Expiration Date	Name	Address	Agency Code	Status
	AZA10001000	Personal Auto	04/13/2015	10/13/2015	James anthony	123 test street Phoenix, AZ 85043-0000	90001-000	In-Force

3. Click on yellow folder to view policy
4. Click on Process Cancellation



	Policy #	Line of Business	Effective Date	Expiration Date	Name
	AZA10001000	Personal Auto	05/27/2015	11/27/2015	JACK FROST
	QAZA1000100	Personal Auto	06/01/2015	12/01/2015	JACK FROST

5. Enter Future Transaction Effective Date if other than current date, Transaction Type, Transaction Source, and Transaction Reason, and Remarks (if applicable), then click Submit.
6. Policy confirmation will then appear and forms can be printed to obtain signatures by clicking the Print Forms button.



Policy Number	Transaction Type	Transaction Source	Transaction Reason
AZA100010008	Cancellation	Policyholder	Insured Request

Remarks

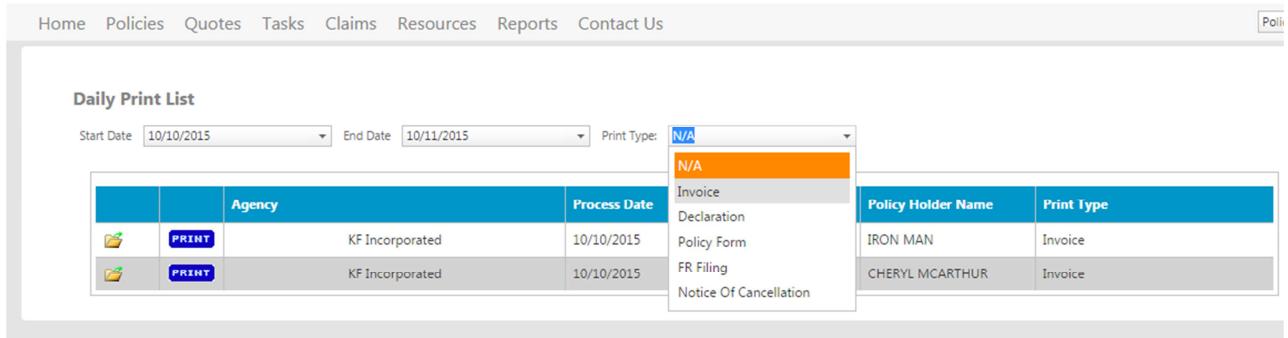
Example Add '08 Ford. Note: This information will print on the confirmation page for your client.

Reference

Policy Effective 5/27/2015
Policy Expiration 11/27/2015
KF Incorporated

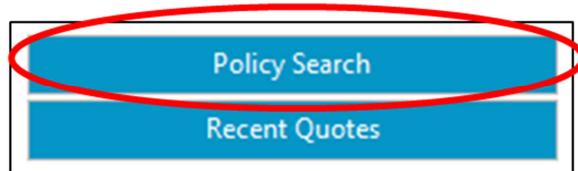
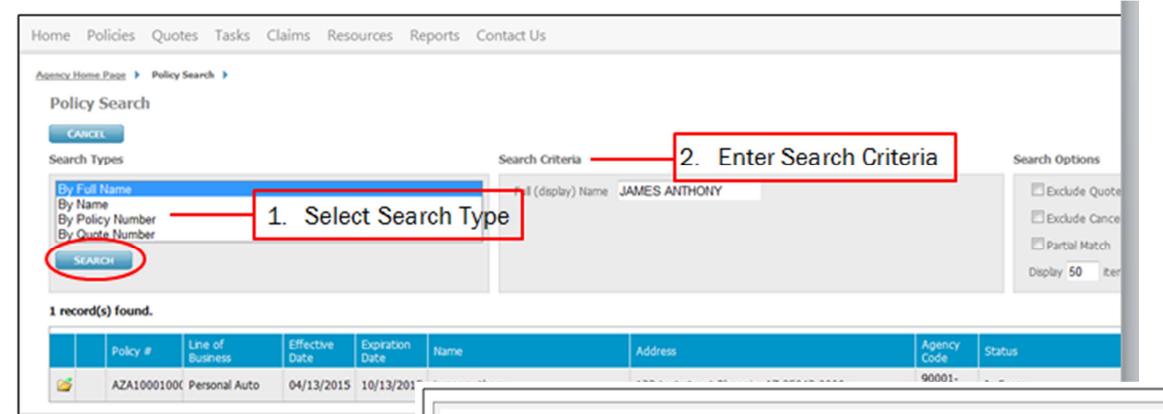
Policy Documents (Daily Print)

1. From the Main Menu bar, select Policies -> Daily Print List.
2. Sort by Date, or Print Type.
3. Click Print to view/print the document directly.
4. Click on yellow folder to view policy.

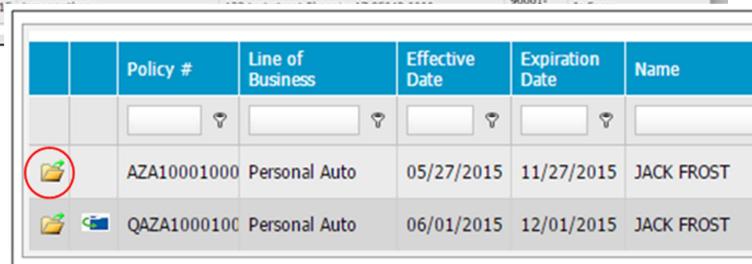


Policy Documents – Specific Policy

5. Click “Policy Search”.
6. Enter Search Criteria and click “Search”.

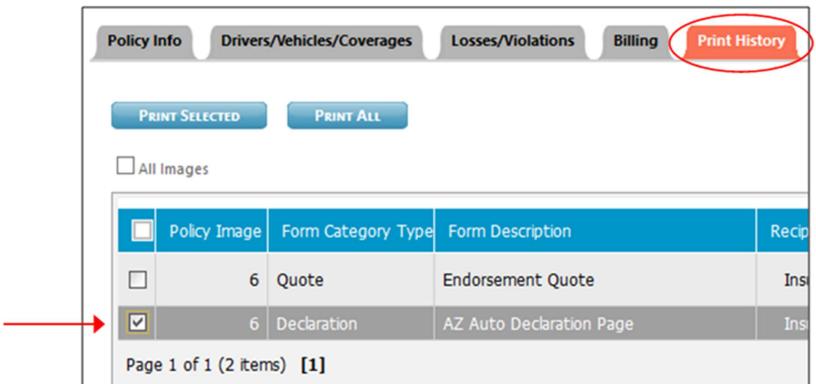



7. Click on the yellow folder to view policy.



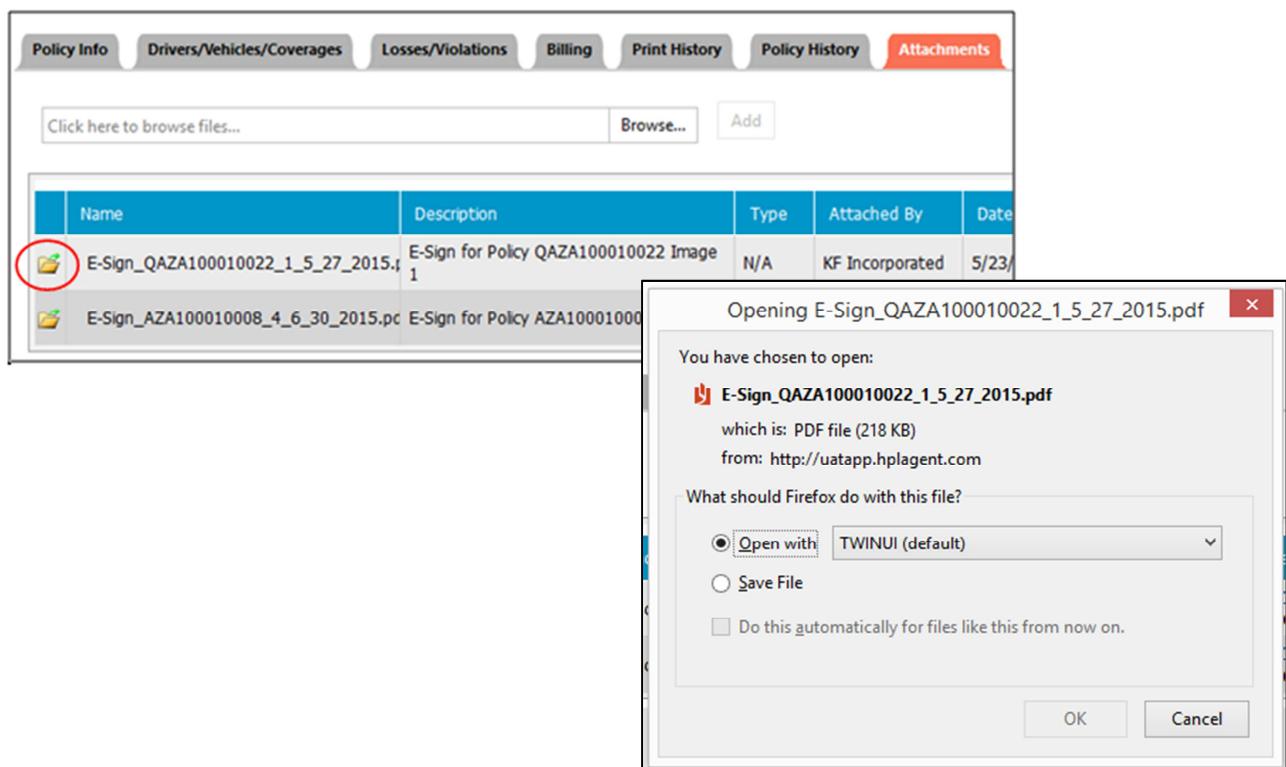
	Policy #	Line of Business	Effective Date	Expiration Date	Name
	AZA10001000	Personal Auto	05/27/2015	11/27/2015	JACK FROST
	QAZA1000100	Personal Auto	06/01/2015	12/01/2015	JACK FROST

- Policy documents, such as declaration page and endorsements, can be found under the Print History tab. To view pdf or print, select box at the left of desired document and click “Print Selected”.
- Print documents display for only the most recent policy transaction. To view historical policy documents, click the “All Images” button.



The screenshot shows the 'Print History' tab selected in the top navigation bar. Below it is a table with columns: Policy Image, Form Category Type, Form Description, and Recipient. The first row has an empty checkbox. The second row has a checked checkbox, and the 'Form Description' column contains 'AZ Auto Declaration Page'. At the bottom of the table, it says 'Page 1 of 1 (2 items) [1]'.

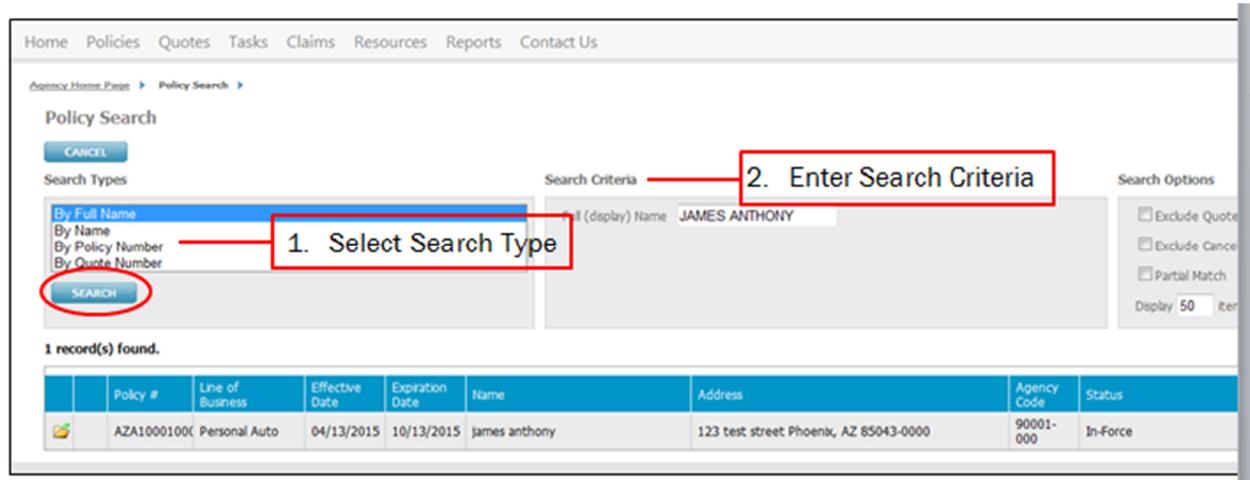
8. E-Sign documents can be located under the Attachments tab. Click folder to view, print, or save documents that required e-signature.



The screenshot shows the 'Attachments' tab selected in the top navigation bar. Below it is a table with columns: Name, Description, Type, Attached By, and Date. Two rows are listed: one for 'E-Sign_QAZA100010022_1_5_27_2015.pdf' and another for 'E-Sign_AZA100010008_4_6_30_2015.pdf'. A red circle highlights the first file. A modal window titled 'Opening E-Sign_QAZA100010022_1_5_27_2015.pdf' is open, displaying file details: 'E-Sign_QAZA100010022_1_5_27_2015.pdf', 'PDF file (218 KB)', and 'http://uatapp.hplagent.com'. It asks 'What should Firefox do with this file?' with options: 'Open with TWINUI (default)' (selected), 'Save File', and 'Do this automatically for files like this from now on.' Buttons 'OK' and 'Cancel' are at the bottom right of the modal.

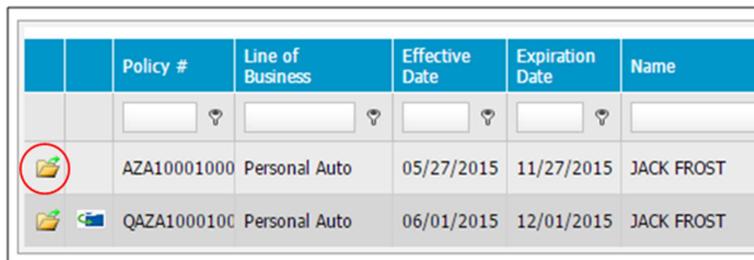
Billing

1. Click "Policy Search".
2. Enter Search Criteria and click "Search".

The screenshot shows the "Policy Search" screen. On the left, under "Search Types", there are four options: "By Full Name" (selected), "By Name", "By Policy Number", and "By Quote Number". Below these is a "SEARCH" button, which is circled in red. To the right, the "Search Criteria" section contains a search bar with the placeholder "Search (display) Name JAMES ANTHONY". On the far right, there are "Search Options" checkboxes for "Exclude Quote", "Exclude Cancel", and "Partial Match", with "Display 50 items" selected. Below the search area, it says "1 record(s) found." and shows a table with one row of data. The table columns are: Policy #, Line of Business, Effective Date, Expiration Date, Name, Address, Agency Code, and Status. The single record listed is AZA10001000, Personal Auto, 04/13/2015, 10/13/2015, James Anthony, 123 test street Phoenix, AZ 85043-0000, 90001-000, and In-Force.

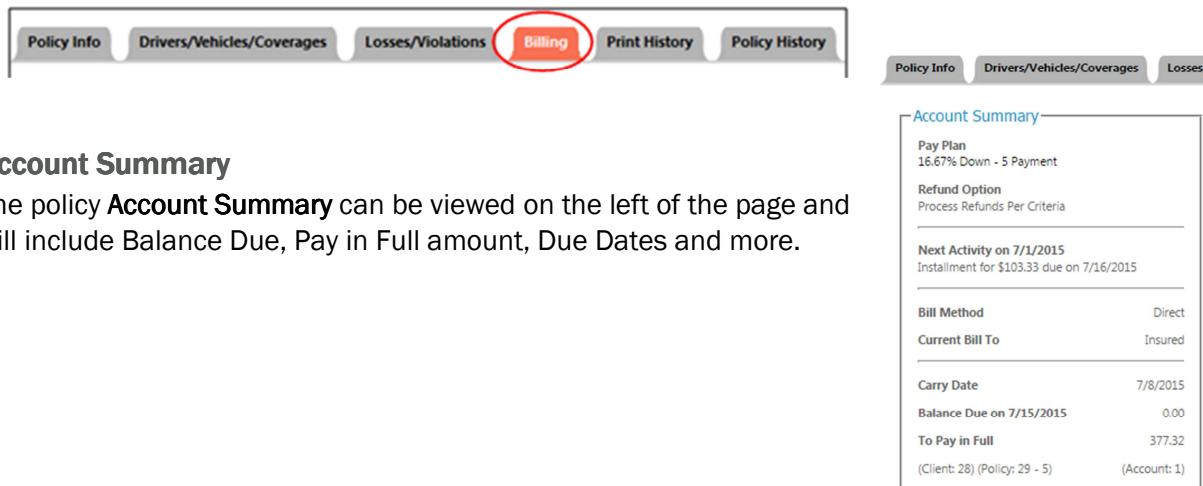
3. Click on yellow folder to view policy.



A screenshot of a list of policies. The table has columns: Policy #, Line of Business, Effective Date, Expiration Date, and Name. There are two rows of data. The first row has a yellow folder icon in the first column and is circled in red. The second row also has a yellow folder icon in the first column. The data in the table is as follows:

	Policy #	Line of Business	Effective Date	Expiration Date	Name
	AZA10001000	Personal Auto	05/27/2015	11/27/2015	JACK FROST
	QAZA1000100	Personal Auto	06/01/2015	12/01/2015	JACK FROST

4. Click on the Billing Tab to review the financial information for this policy.

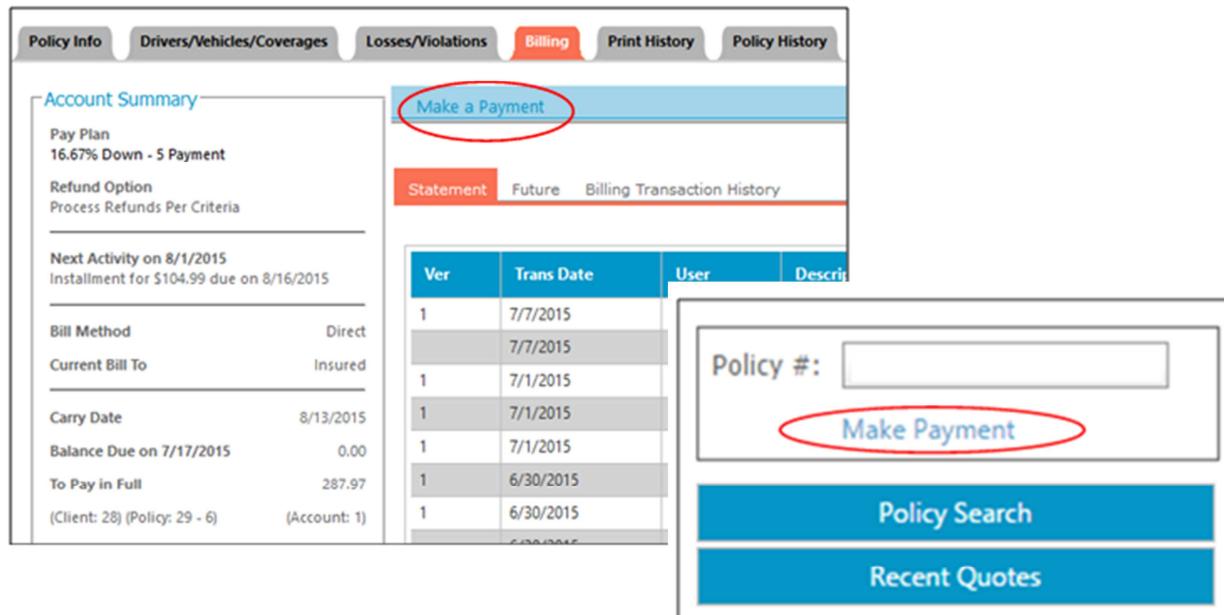


The screenshot shows the "Billing" tab selected in the navigation bar. To the right, the "Account Summary" section is displayed. This section includes the following details:

- Pay Plan:** 16.67% Down - 5 Payment
- Refund Option:** Process Refunds Per Criteria
- Next Activity:** on 7/1/2015
Installment for \$103.33 due on 7/16/2015
- Bill Method:** Direct
- Current Bill To:** Insured
- Carry Date:** 7/8/2015
- Balance Due:** on 7/15/2015 0.00
- To Pay in Full:** 377.32
- (Client: 28) (Policy: 29 - 5) (Account: 1)**

Make a Payment

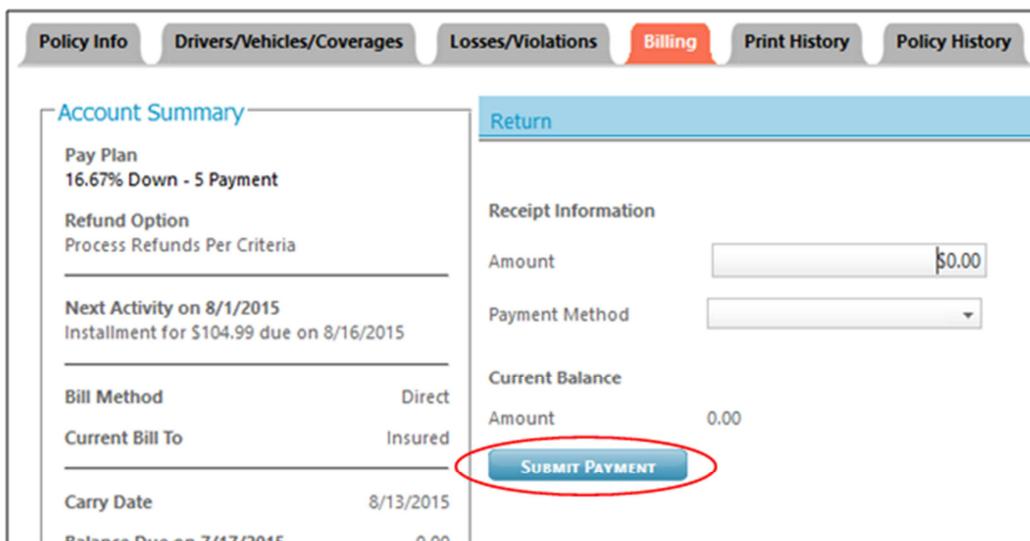
Payments can be made while in the Billing tab, by clicking “Make a Payment”, located in the light blue bar.



The screenshot shows the 'Billing' tab selected in the top navigation bar. On the left, there's an 'Account Summary' section with various policy details. In the center, a large button labeled 'Make a Payment' is circled in red. Below it is a table of transaction history. To the right, there's a search interface with fields for 'Policy #' and a 'Make Payment' button, which is also circled in red. Below that is a 'Policy Search' button and a 'Recent Quotes' section.

Tip: A payment can also be made on the Homepage by clicking Make a Payment

1. Enter amounts, select Payment Method, and click Submit Payment.



The screenshot shows the 'Return' section of the website. It includes an 'Account Summary' on the left and a 'Return' form on the right. The 'Return' form has fields for 'Amount' (\$0.00), 'Payment Method' (dropdown menu), and 'Current Balance' (Amount 0.00). At the bottom of the form is a large blue 'SUBMIT PAYMENT' button, which is circled in red.

Statements, Future Billing Activity and Billing Transaction History

Statements, Future Billing Activity and Billing Transaction History can be located on the orange menu bar within the Billing tab.

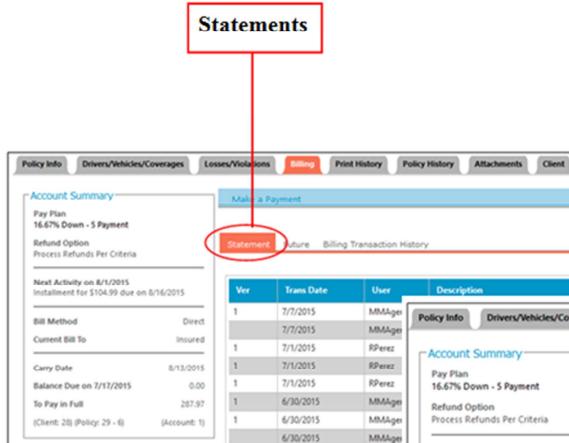
Policy Info
Drivers/Vehicles/Coverages
Losses/Violations
Billing
Print History
Policy History

Policy Info
Drivers/Vehicles/Coverages
Losses/Violations
Billing
Print History
Policy History
Attachments
Client

Info	Attachments	Contacts
Policy Information		
Policy Number	Effective	
AZA100010008	05/27/2015	
Billing Information		
Policy Number	Pay Plan	Current Act
AZA100010008	16.67% Down - 5 Payment	Due Date: 0
Payment History Future Installments		
Date		
<input type="text" value="07/07/2015"/>		
<input type="text" value="07/07/2015"/>		
<input type="text" value="07/07/2015"/>		

Tip: Billing information can also be accessed under the client tab and selecting Info located on the orange bar menu

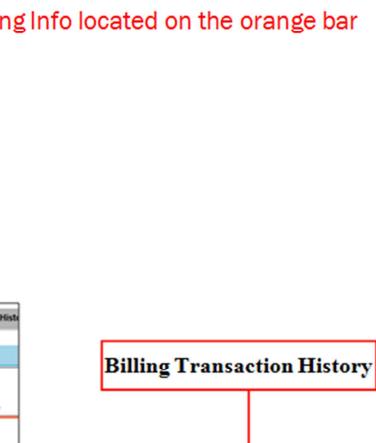
Statements

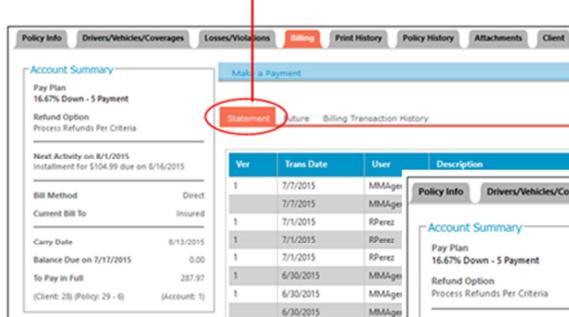


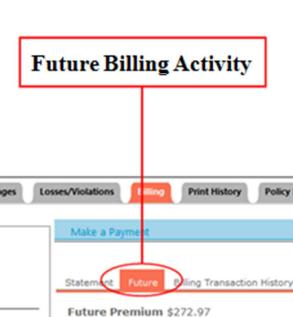
Future Billing Activity

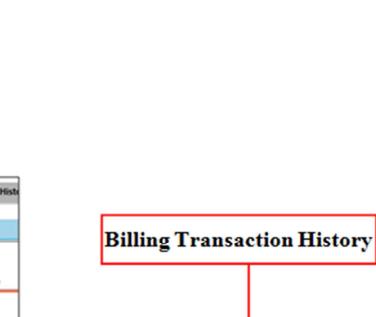


Billing Transaction History





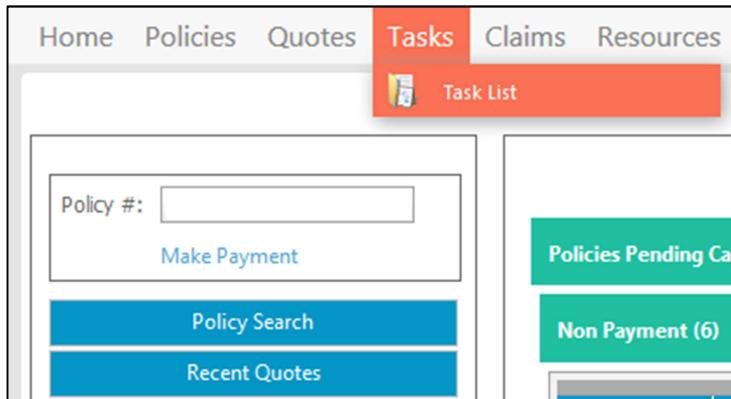




Task List

A list of items requiring action are provided in the Task List. Tasks can be deleted, printed, or the policy can be viewed.

- Under the Tasks menu select Task List to take action.

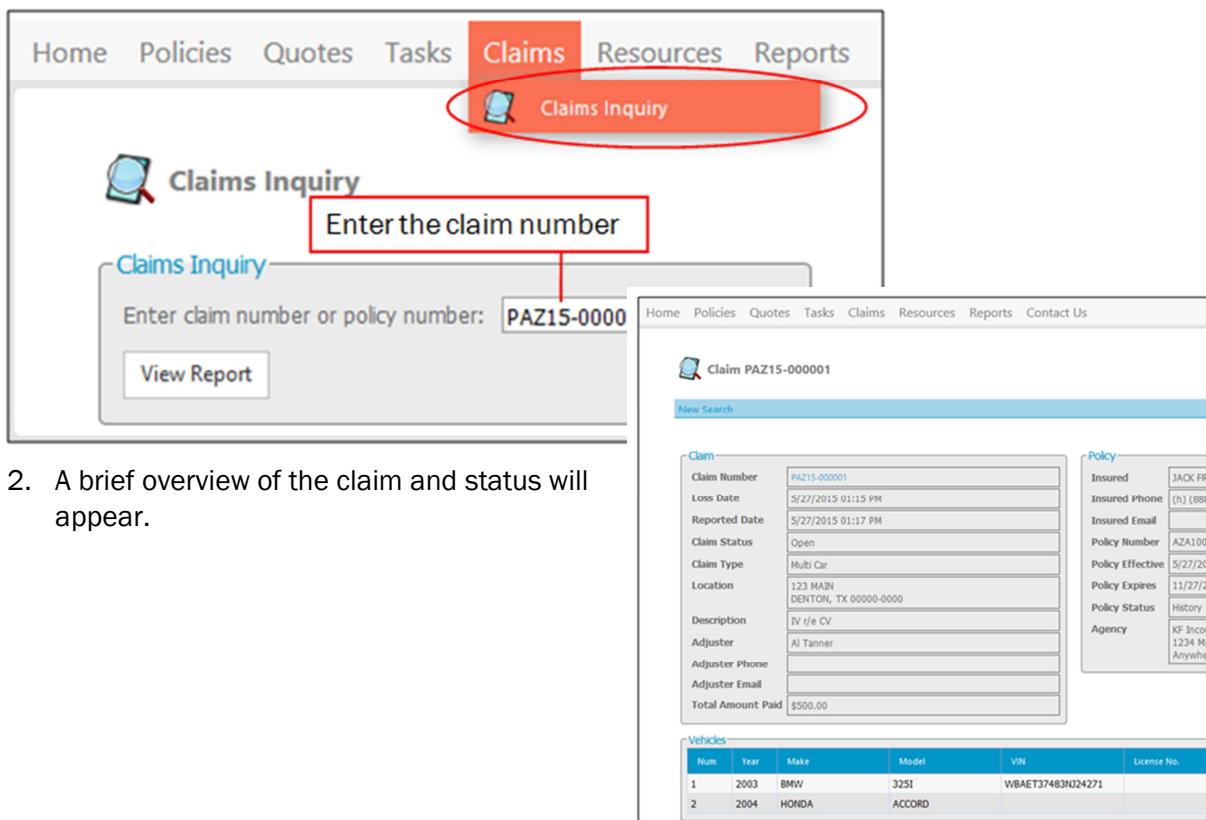


The screenshot shows a top navigation bar with tabs: Home, Policies, Quotes, Tasks, Claims, and Resources. The 'Tasks' tab is highlighted with a red background. Below the navigation bar, there is a 'Task List' section containing three buttons: 'Policy #:' with a text input field, 'Make Payment', 'Policy Search', and 'Recent Quotes'. To the right, there are two teal-colored boxes: 'Policies Pending Car' and 'Non Payment (6)'.

Claim Lookup

To locate a claim and obtain status information

- Enter the Claim number and select Claims Inquiry from the Claims drop down menu.



The screenshot shows a top navigation bar with tabs: Home, Policies, Quotes, Tasks, Claims, Resources, and Reports. The 'Claims' tab is highlighted with a red background. Below the navigation bar, there is a 'Claims Inquiry' section with a magnifying glass icon, an 'Enter the claim number' input field containing 'PAZ15-0000', and a 'View Report' button. To the right, there is a detailed view of a claim with sections for 'Claim' and 'Policy'. The 'Claim' section includes fields for Claim Number, Loss Date, Reported Date, Claim Status, Claim Type, Location, Description, Adjuster, Adjuster Phone, Adjuster Email, and Total Amount Paid. The 'Policy' section includes fields for Insured, Insured Phone, Insured Email, Policy Number, Policy Effective Date, Policy Expires Date, Policy Status, and Agency. At the bottom, there is a 'Vehicles' table with two rows of vehicle information.

Num	Year	Make	Model	VIN	License No.
1	2003	BMW	325I	WBAET37483N24271	
2	2004	HONDA	ACCORD		

Policy Number: AZA100010008

Policy Holder: JACK FROST

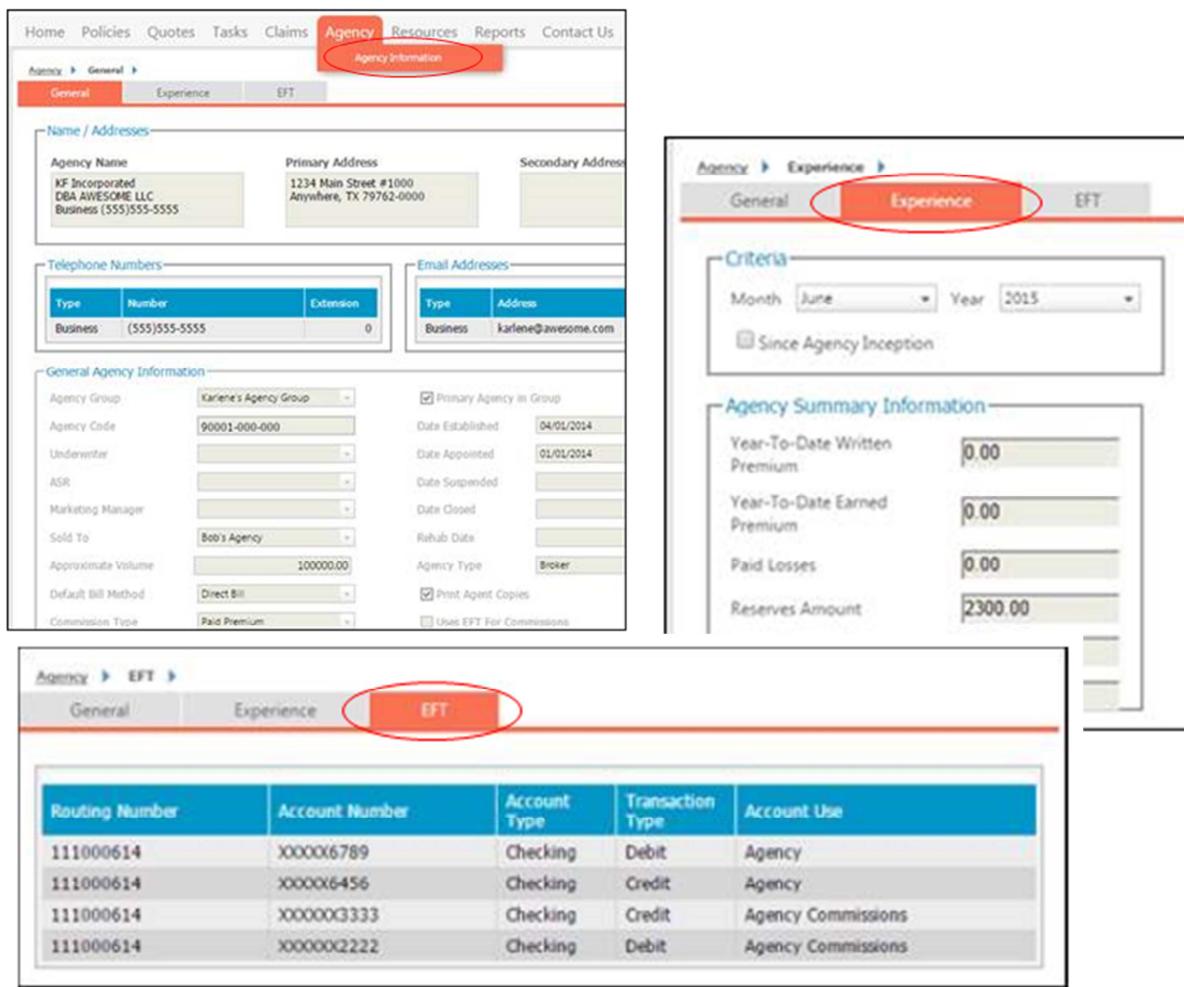
[Close](#)


Tip: Claim Information can also be accessed under the client tab and selecting info located on the orange menu bar.

Agency Information

Agency information can be obtained by selecting Agency Information under the Agency menu.

- The General information tab will allow you to view main information such as address, phone, email, and lines of business.
- Through the Experience tab, paid losses, reserves, written premium, earned premium, and more are searchable.
- With the new EFT tab, sweep and commission information can be verified so that the banking information remains up-to-date and accurate.



General Tab (Left):

Name / Addresses	
Agency Name KF Incorporated DBA AWESOME LLC Business (555)555-5555	Primary Address 1234 Main Street #1000 Anywhere, TX 79762-0000
Secondary Address	
Telephone Numbers	
Type Business	Number (555)555-5555
Extension 0	
Email Addresses	
Type Business	Address karlene@awesome.com
General Agency Information	
Agency Group Agency Code Underwriter ASR Marketing Manager Sold To Approximate Volume Default Bill Method Commission Type	Karlene's Agency Group 90001-000-000 Bob's Agency 100000.00 Direct Bill Paid Premium
	<input checked="" type="checkbox"/> Primary Agency in Group Date Established 04/01/2014 Date Appointed 01/01/2014 Date Suspended Date Closed Rebub Date <input checked="" type="checkbox"/> Print Agent Copies <input type="checkbox"/> Use EFT For Commissions

Experience Tab (Middle):

Criteria	
Month June	Year 2015
<input type="checkbox"/> Since Agency Inception	
Agency Summary Information	
Year-To-Date Written Premium	0.00
Year-To-Date Earned Premium	0.00
Paid Losses	0.00
Reserves Amount	2300.00

EFT Tab (Bottom):

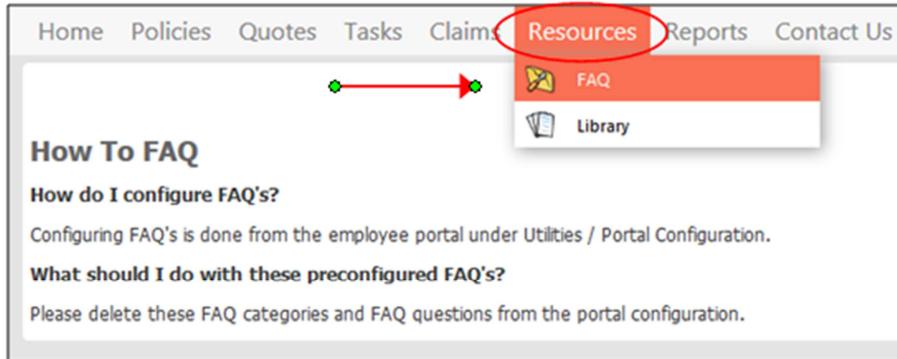
Routing Number	Account Number	Account Type	Transaction Type	Account Use
111000614	X00006789	Checking	Debit	Agency
111000614	X00006456	Checking	Credit	Agency
111000614	X000003333	Checking	Credit	Agency Commissions
111000614	X000002222	Checking	Debit	Agency Commissions

Resources

Other information is available to you such as frequently asked questions, training materials and state specific guidelines.

FAQs

To access frequently asked questions, select FAQ from the Resources drop down menu.



The screenshot shows a web browser window with the Hallmark Agency Web Portal URL. The top navigation bar includes links for Home, Policies, Quotes, Tasks, Claims, Resources (which is highlighted with a red oval), Reports, and Contact Us. A dropdown menu for 'Resources' is open, showing two options: 'FAQ' (highlighted with a red arrow) and 'Library'. Below the dropdown, a section titled 'How To FAQ' contains two questions: 'How do I configure FAQ's?' and 'What should I do with these preconfigured FAQ's?'. The answer to the first question states: 'Configuring FAQ's is done from the employee portal under Utilities / Portal Configuration.' The answer to the second question states: 'Please delete these FAQ categories and FAQ questions from the portal configuration.'

Library

To access state specific information such as state guidelines and quick reference guides select library from the Resources drop down menu.

Quick Reference Guides

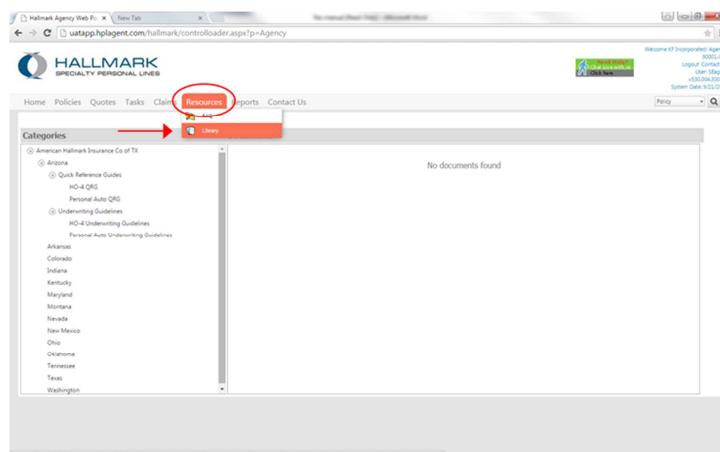
State specific coverage options, discounts, and pay plans

Underwriting Guidelines

State Specific Guidelines

Training Materials

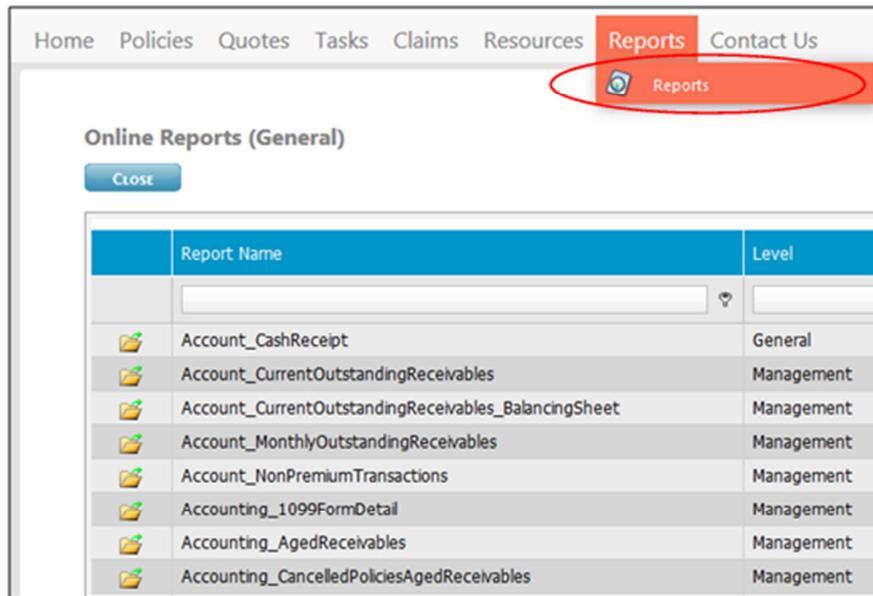
FLEX outline in PDF and audio



The screenshot shows a web browser window with the Hallmark Agency Web Portal URL. The top navigation bar includes links for Home, Policies, Quotes, Tasks, Claims, Resources (highlighted with a red oval), Reports, and Contact Us. A dropdown menu for 'Resources' is open, showing one option: 'Library' (highlighted with a red arrow). The main content area is titled 'Categories' and lists several items under 'American Hallmark Insurance Co of TX': Quick Reference Guides (HO-4 QRG, Personal Auto QRG), Underwriting Guidelines (HO-4 Underwriting Guidelines, Personal Auto Underwriting Guidelines), and state-specific sections for Alaska, Colorado, Indiana, Kentucky, Maryland, Montana, Nevada, New Mexico, Ohio, Oklahoma, Tennessee, Texas, and Washington. A message at the bottom of the list states 'No documents found'.

Reports

Commission Reports, Production and Loss Runs, Policies in Force, Payments, Etc.



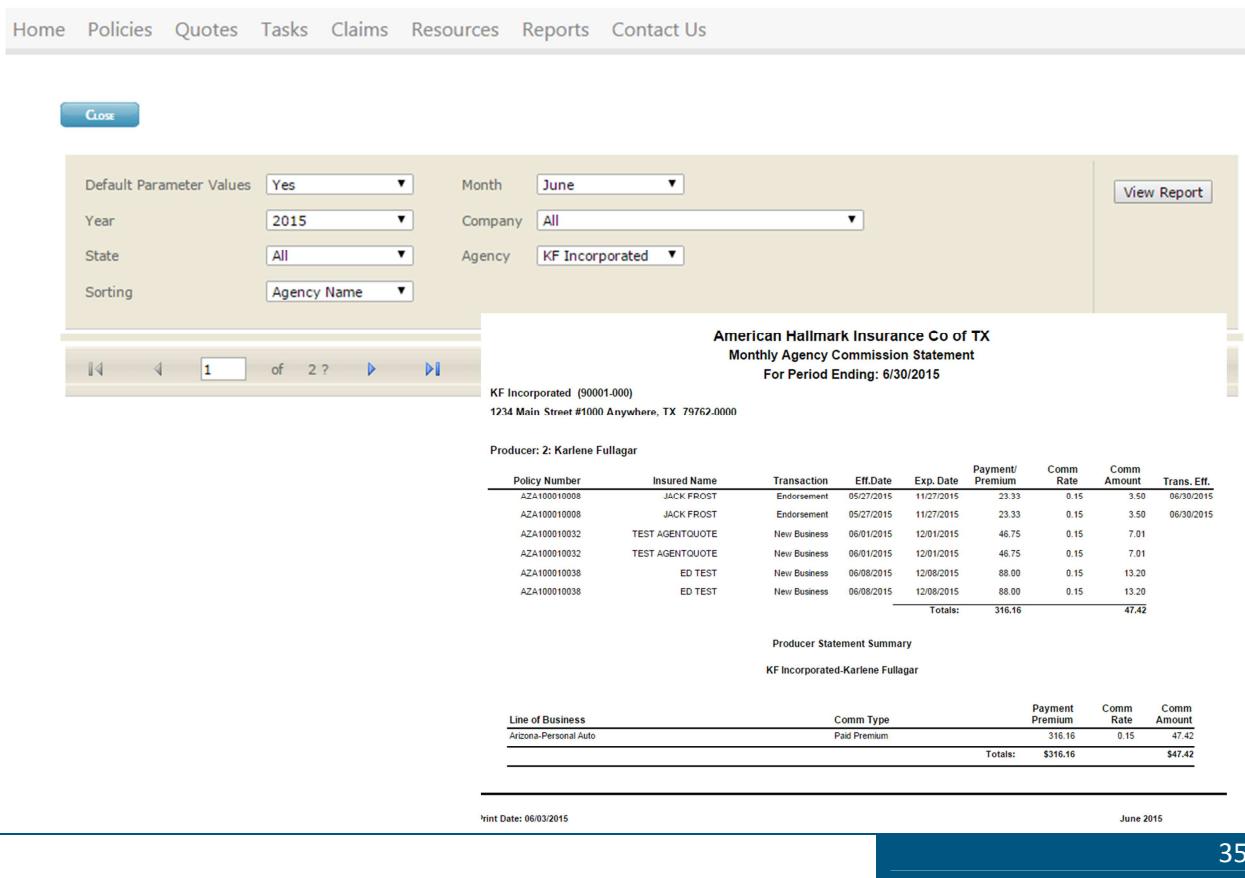
Online Reports (General)

Close

	Report Name	Level
	Account_CashReceipt	General
	Account_CurrentOutstandingReceivables	Management
	Account_CurrentOutstandingReceivables_BalancingSheet	Management
	Account_MonthlyOutstandingReceivables	Management
	Account_NonPremiumTransactions	Management
	Accounting_1099FormDetail	Management
	Accounting_AgedReceivables	Management
	Accounting_CancelledPoliciesAgedReceivables	Management

Finding Commissions

Monthly commissions are available and can be pulled by month and branch locations. The report name is titled Monthly Commission Report.



Default Parameter Values **Yes** Month **June** **View Report**

Year **2015** Company **All**

State **All** Agency **KF Incorporated**

Sorting **Agency Name**

American Hallmark Insurance Co of TX
 Monthly Agency Commission Statement
 For Period Ending: 6/30/2015

KF Incorporated (90001.000)
 1234 Main Street #1000 Anywhere, TX 79762.0000

Producer: 2: Karlene Fullagar

Policy Number	Insured Name	Transaction	Eff.Date	Exp.Date	Payment/Premium	Comm Rate	Comm Amount	Trans. Eff.
AZA100010008	JACK FROST	Endorsement	05/27/2015	11/27/2015	23.33	0.15	3.50	06/30/2015
AZA100010008	JACK FROST	Endorsement	05/27/2015	11/27/2015	23.33	0.15	3.50	06/30/2015
AZA100010032	TEST AGENTQUOTE	New Business	06/01/2015	12/01/2015	46.75	0.15	7.01	
AZA100010032	TEST AGENTQUOTE	New Business	06/01/2015	12/01/2015	46.75	0.15	7.01	
AZA100010038	ED TEST	New Business	06/08/2015	12/08/2015	88.00	0.15	13.20	
AZA100010038	ED TEST	New Business	06/08/2015	12/08/2015	88.00	0.15	13.20	
						Totals:	316.16	47.42

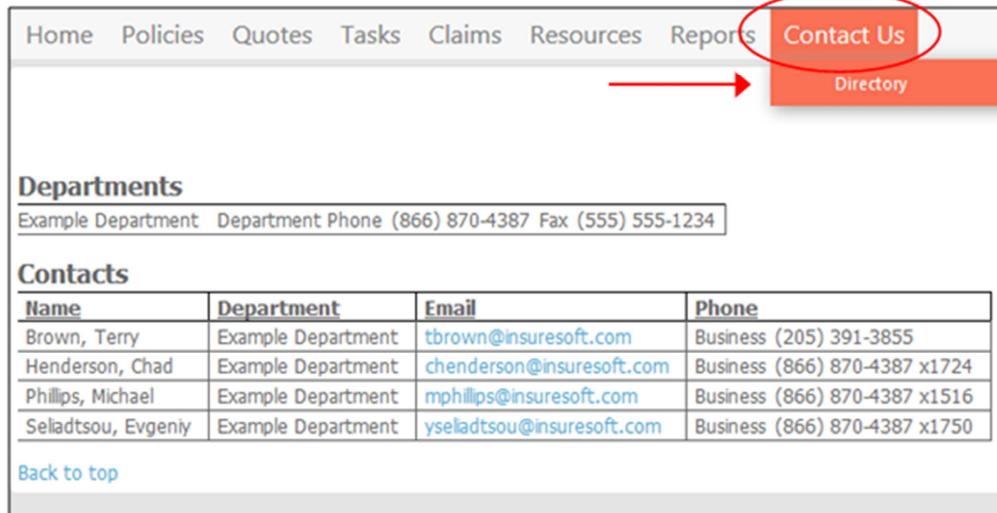
Producer Statement Summary
 KF Incorporated-Karlene Fullagar

Line of Business	Comm Type	Payment Premium	Comm Rate	Comm Amount
Arizona-Personal Auto	Paid Premium	\$316.16	0.15	\$47.42
Totals:				\$316.16
				\$47.42

Print Date: 06/03/2015 June 2015

Contact Us

For a directory of Company Contacts, select Directory from the Contact Us drop down menu.



The screenshot shows a navigation bar with links: Home, Policies, Quotes, Tasks, Claims, Resources, Reports, Contact Us, and a red-highlighted Directory. Below the navigation bar, there's a section titled "Departments" with a single entry: "Example Department Department Phone (866) 870-4387 Fax (555) 555-1234". Under "Contacts", there's a table with four columns: Name, Department, Email, and Phone. The table contains four rows of sample data:

Name	Department	Email	Phone
Brown, Terry	Example Department	tbrown@insuresoft.com	Business (205) 391-3855
Henderson, Chad	Example Department	chenderson@insuresoft.com	Business (866) 870-4387 x1724
Phillips, Michael	Example Department	mphillips@insuresoft.com	Business (866) 870-4387 x1516
Seladtsou, Evgeniy	Example Department	y seladtsou@insuresoft.com	Business (866) 870-4387 x1750

A link "Back to top" is at the bottom of the content area.