

# **Onboarding a New Sub**

Log In and Main Menu Directions

Product and Program Selection

Completing a Quote

Completing an Application

PL TM 0007 0520



## Onboarding a New Sub Producer - Login and Main Menu

- 1. Open Google Chrome, Microsoft Edge, or Mozilla Firefox. You can access i-Reli in any of the following ways:
  - a. Go to American Reliable.com and click "i-Reli Agent Log In."

i-Reli Agent Log In >

- b. Go directly to ARICireli.com.
- c. Your General Agency may provide a *single sign-on option* on your web page.
- The login screen opens.
  - a. Enter your Username and Password. Click "Submit >>."
    - Self-service password reset tool
    - FAQs



The i-Reli Home Page displays:

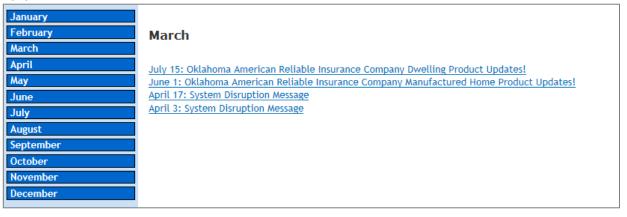


- a. Main Menu buttons (General Agency set-up is shown)
  - New Quote
  - New Application
  - Quote/Application Inquiry
  - Policy Inquiry
  - Messages
  - Roll Over

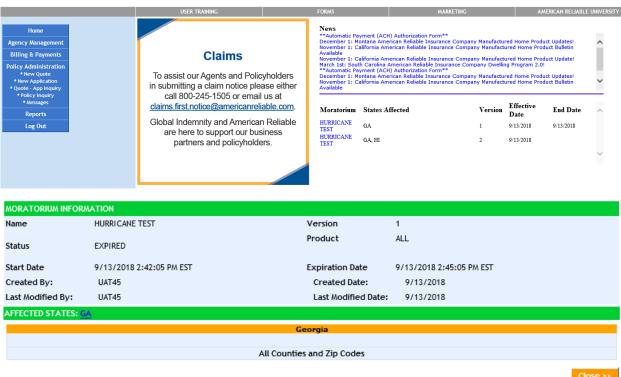
#### b. User Training



#### c. News



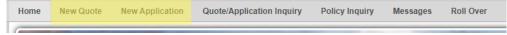
4. Click on the Moratorium name to see what States, Counties, and ZIP Codes are affected.



### Onboarding a New Sub Producer – Product and Program Selection

When starting a new quote or application, you are directed to the Product and Program selection screens. These screens help select the desired State and Product and determine which programs / policy types are available for a specific product.

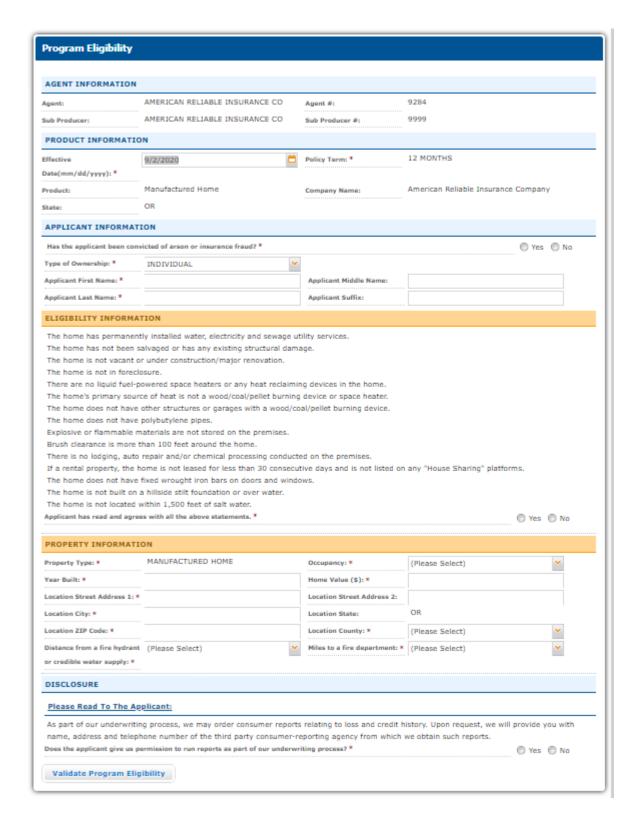
After selecting "Policy Administration" from the i-Reli Main Menu, select either "New Quote" or "New Application."



The Product Selection screen will open. Enter the Effective Date and select the State and Product you need.



3. After selecting the State and Product, the Program Eligibility screen displays. In the Program Eligibility Information section, complete the required fields marked with red asterisks. Also, acknowledge the Insured's permission to run reports in the Disclosure section.



4. Click "Validate Program Eligibility" to proceed.

### **Onboarding a New Sub Producer – Completing a Quote**

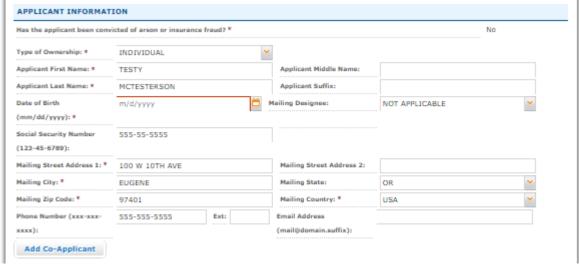
After completing the Product Selection and Program Eligibility, click "Start Quote" to begin.

Start Quote

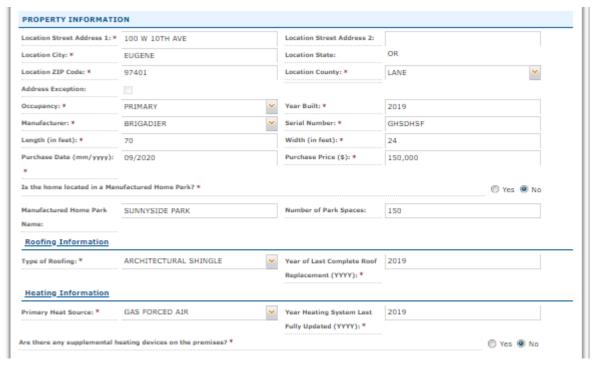
The quote is an easy-to-complete, single screen. Complete the required fields. Simply tab between fields or scroll down to complete all sections. To get started, confirm or update the Effective Date.



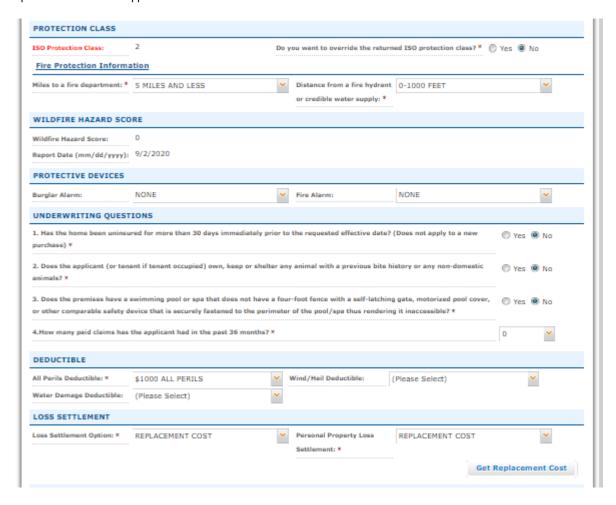
Complete the Applicant Information section. Information is required for all fields marked with red asterisks. If the Social Security Number is not provided or not available, input "555-55-5555" to proceed.



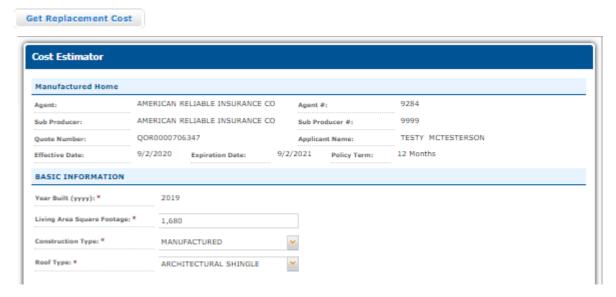
4. Complete the Property Information, Roofing, and Heating Information sections.

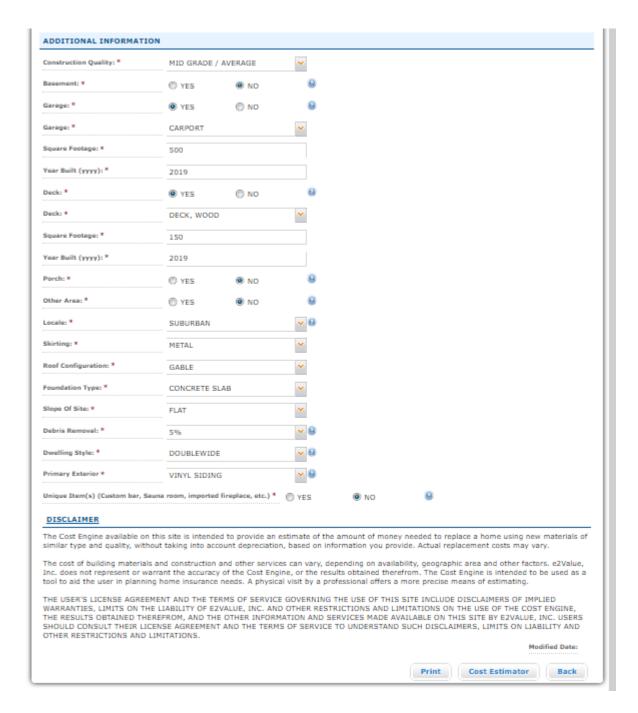


5. Protection Class, Protective Devices, Underwriting Questions, Deductible, and Loss Settlement sections: Complete all required fields as well as any optional fields that are applicable.



6. If Replacement Cost is selected as the Loss Settlement Option, you will need to complete the Replacement Cost Estimator by selecting "Get Replacement Cost."

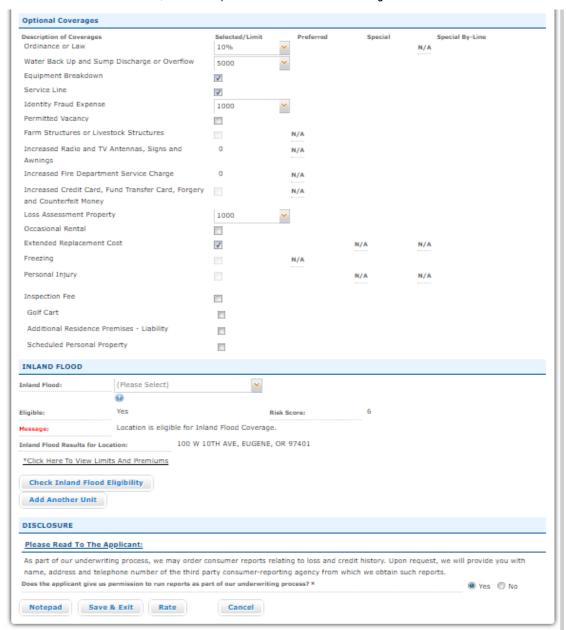




7. The replacement value will populate on the Quick Quote screen. Properties with Replacement Cost should be written for 100% replacement value. You may update your Coverage A limit here.



8. Optional Coverages section: Complete all required fields as well as any applicable optional fields. To check if the property is eligible for the Inland Flood Endorsement, click Check Inland Flood Eligibility. If the location is not in flood zones A or V, the property will be eligible. If the risk is eligible, and the insured wants this endorsement, use the drop-down field to select the coverage limit.

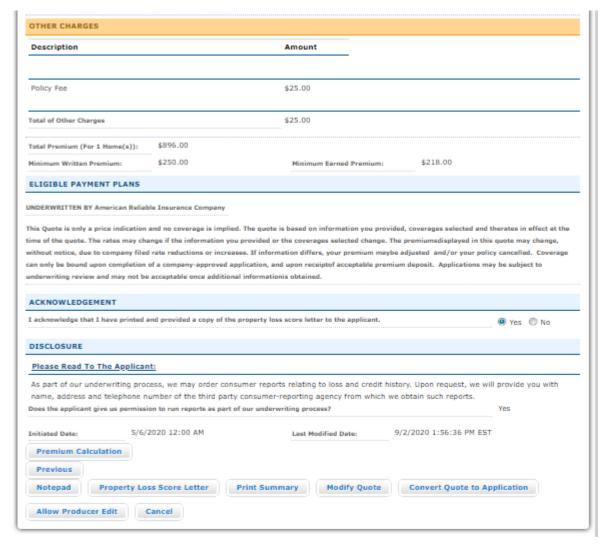


9. Rate the Quote: After scrolling to the bottom of the screen, you can either save the quote or rate the quote by clicking "Rate."



10. The Summary will open and display some of the basic information about the applicant, product, program, and the unit to be insured. The Coverage Information section contains the quote for the premium. Note the Total Premium, including all Discounts, Surcharges, and Other Charges, is shown.

PPLICANT INFORMAT	ION				
pplicant Name:	TESTY MCTESTERSON	Date of Birth:	1/13/1976		
ddress:	100 W 10TH AVE				
	EUGENE, OR 97401, USA		Andreas		
aytime Phone:	555555555	Billed to Party:	Applicant		
RODUCER INFORMAT	ION				
roducer:	AMERICAN RELIABLE INSURANCE CO	Producer #:	9999		
elephone:	480-483-8666				
gent:	AMERICAN RELIABLE INSURANCE CO	Agent #:	9284		
uote Information					
	Q0R0000706347		OR		
uote Number:		State:			
roduct:	Manufactured Home	Program:	MFD Home (47)		
ffective Date:	9/2/2020	Expiration Date:	9/2/2021		
olicy Term:	12 Months	Company Name:	AMERICAN RELIABLE INSURANCE  COMPANY		
			www.rec.PATE E		
Init 1					
ear Built (уууу):	2019	Occupancy:	PRIMARY		
rotection Class:	. 2	Policy Form:	Preferred		
ocation Street Address:	100 W 10TH AVE	Location City, State, ZIP	EUGENE, OR, 97401		
		Code:			
COVERAGE INFORMAT	ION				
COVERAGE INFORMATI					
		Limit	Premium		
		Limit	Premium		
Description of Coveraç	ges	Limit Selected	Premium  Included		
Description of Coverag	ges lacement Cost				
Description of Coverage Manufactured Home Rep Personal Property Replac Coverage A - Manufactur	Jacement Cost Dement Cost Tred Home	Selected	Included		
Description of Coverage  Manufactured Home Rep Personal Property Replac Coverage A - Manufactur Coverage B - Other Struc	lacement Cost tement Cost ted Home ctures	Selected Selected \$170,000 \$17,000	Included Included \$744.00 Included		
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Manufactured Home Rep Personal Property Replac Coverage A - Manufactur Coverage B - Other Stru Coverage C - Personal Pr Coverage C - Personal Pr Coverage E - Personal Li Coverage F - Medical Pay Ordinance or Law Water Back Up and Sum; Equipment Breakdown Service Line Identity Fraud Expense Loss Assessment Propert Extended Replacement C Inflation Guard 2% Builders Risk Deductible	Jacement Cost tement Cost tement Cost ted Home cutures troperty te ability yments to Others p Discharge or Overflow	Selected Selected \$170,000 \$17,000 \$85,000 \$34,000 \$50,000 \$500 \$17,000 \$5,000 Selected \$1,000 \$1,000 Selected \$1,000 Selected Selected Selected Selected	Included Included \$744.00 Included Included Included Included \$35.00 \$5.00 Included \$22.00 \$45.00 Included		
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- 11. Click "Convert Quote to Application" to open the application screens. All of the information contained in the quote will be transferred to the application.
- 12. Acknowledgment and Print the Quote: Select "Yes" to acknowledge that a copy of the property loss score letter was provided to the applicant. This can be accessed by clicking "Property Loss Score Letter." To print a summary of the quote, select "Print Summary."

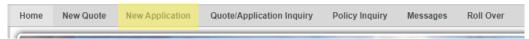


# American Reliable Insurance Company Quote Summary

Quote Information											
Quote ID #		Applicant Name	Program	Product		Policy Term	Eff. Date	Exp. Date			
QAZ0000438813		JON DOE	Preferred (46)	Manufactu	red Home	12	06-19-2019	06-19-2020			
Date of Birth: 01-01-1980			Daytime Phone:								
Producer Name: AMERICAN RELIABLE INSURANCE CO					Producer #	: 9999 <b>Tele</b>	phone: 480-4	183-8666			
General Agent: AMERICAN RELIABLE INSURANCE CO				General Agent #: 9284							
Home and Location Information											
Occupancy	Year	<b>Location Street Address</b>			City, State,	Zip Code					
PRIMARY	2010	8667 E HARTFORD DR			SCOTTSDALE, AZ, 85255						
Coverage Information											
Coverage				Limit			Premium				
Coverage A - Manufactured Home				\$125,000			\$718.00				
Coverage B - Other Structures			·	\$12,500			Included				
Coverage C - Personal Property			\$62,500			Included					

## Onboarding a New Sub Producer - Completing an Application

From the Policy Administration menu, select "New Application."



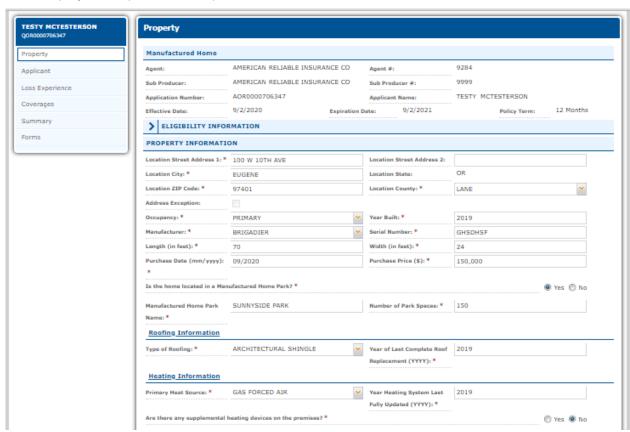
After completing the Product and Program selection, click "Start Application."

Start Application

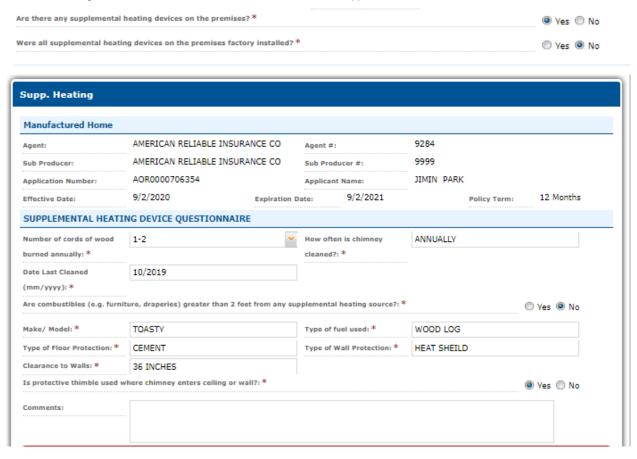
3. Note the layout of the Application screen with tabs located down the side for each section of the application. Complete all of the required information on each tab. The system will rate, integrate with reports, and determine underwriting eligibility.



4. On the Property tab, complete all of the required fields.



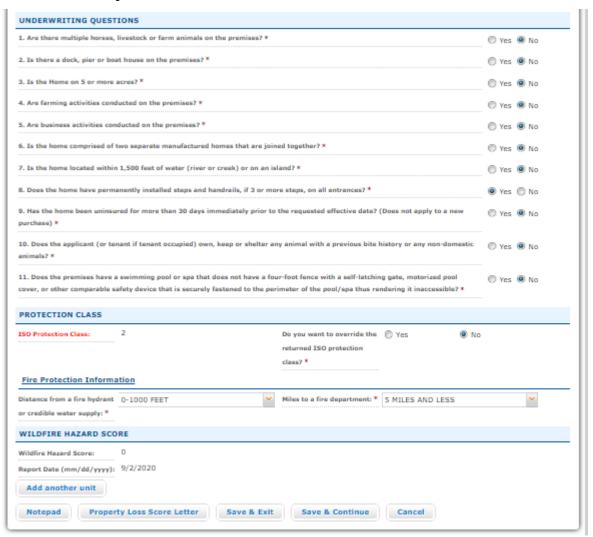
5. If the property has a supplemental heating device, you will need to answer the question regarding whether or not it was factory installed. If this question is answered "No," a Supplemental Heating Device Questionnaire will display for you to complete. Note that when this condition is present, you will receive a message that the risk will be submitted to an underwriter for approval.



6. Select any Protective Devices that are applicable in this section.



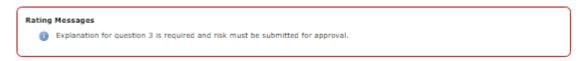
7. Answer the Underwriting Questions.



8. If you answer "Yes" to any of the Underwriting Questions, the system will open a Comments field for you to provide details.



The system will also let you know if any of your answers to the Underwriting Questions will require an underwriting review.



10. In the Protection Class section, the ISO Protection Class will be calculated. If ISO Protection Class returns a different protection class than what you entered, you will be alerted and asked whether the ISO Protection Class should be overridden. If you choose to override, a message will appear advising you that this condition requires underwriting approval.



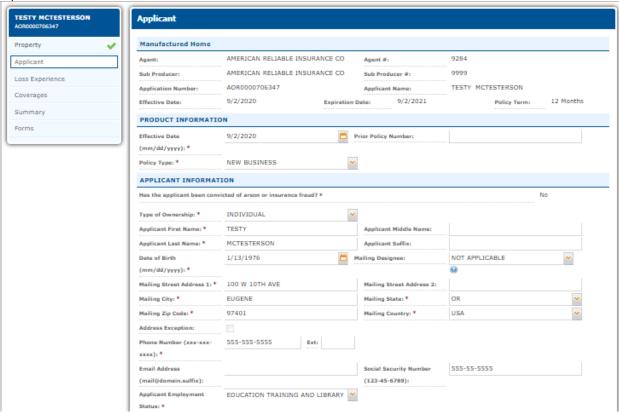
11. Complete the Fire Protection Information.



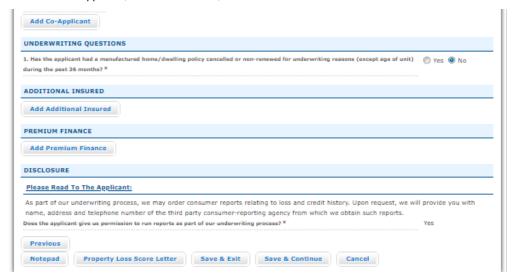
12. The Wildfire Hazard Score (if applicable) will appear here.



- 13. Click "Save & Continue" to move to the Applicant tab.
- 14. In the Applicant tab, if a social security number is required, but is not provided by the applicant, enter "555-55-555" in the field. Select "Save & Continue" to proceed.



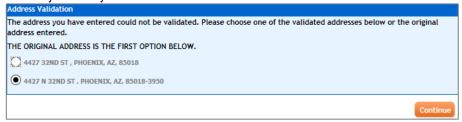
15. Click the applicable buttons to add a Co-Applicant, Additional Insured, or Premium Finance.



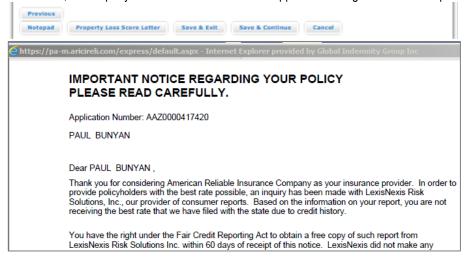
16. An error message will display if required fields are not completed. These messages guide you through the application and advise you of conditions.

#### Messages:

- · Mailing State is required.
- 17. i-Reli may also ask you to review addresses if it is unable to validate the address entered for mailing or the location.



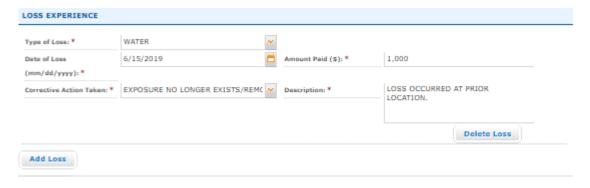
18. Behind the scenes, i-Reli is running the PLS (if applicable) to run the base rate. If the score is a "no-hit" or if the applicant's score does not qualify for the best tier, the Property Loss Score Letter button will appear. Selecting this button will open the letter, which may be printed.



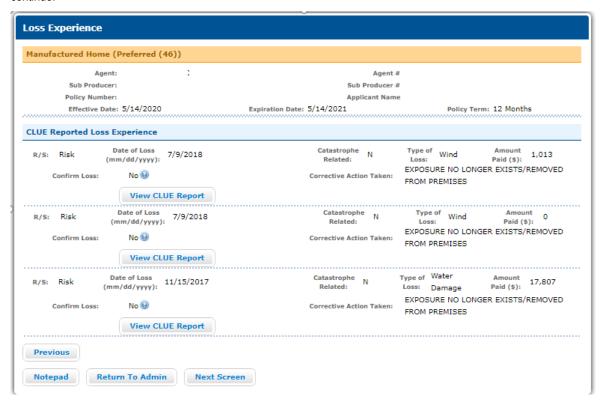
19. Once you have successfully completed the Applicant tab, you will advance to the Loss Experience tab.



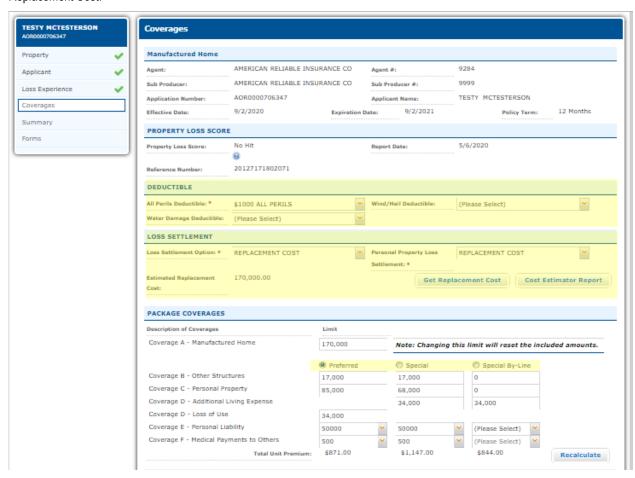
20. Enter a loss by clicking "Add Loss" and completing the required fields. Note that a CLUE report will automatically run.



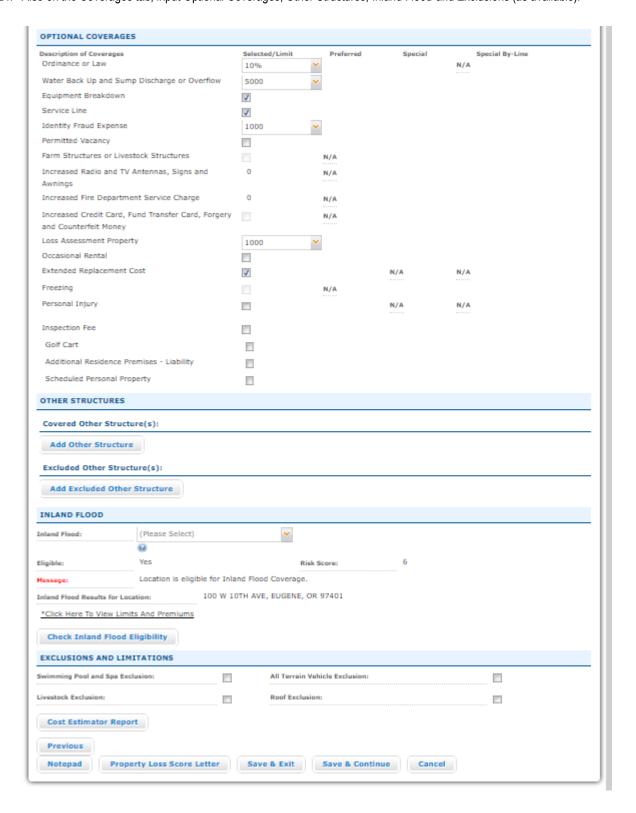
21. If losses are returned after the CLUE report is run, they will be displayed as shown. Click View CLUE Report to open the report. Click "Next Screen" to continue.



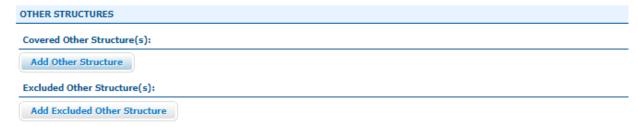
- 22. Click "Save & Continue" to move to the Coverages tab.
- 23. On the Coverages tab, you have the ability to input Deductibles, Loss Settlement, and Package Coverages, including selecting the Program Package. If Replacement Cost is selected as the Loss Settlement Option, you will need to complete the Replacement Cost Estimator by selecting "Get Replacement Cost."



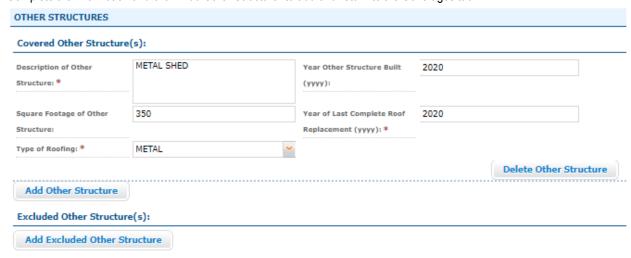
24. Also on the Coverages tab, input Optional Coverages, Other Structures, Inland Flood and Exclusions (as available).



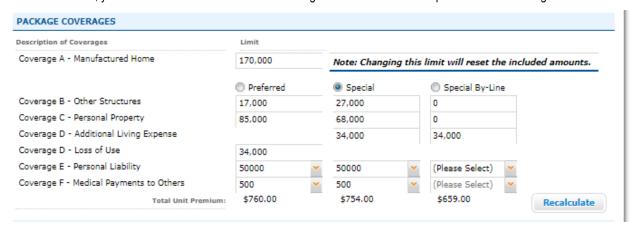
25. If other structures are present, click "Add Other Structure." Complete the information so they are included in the premium calculation.



26. Complete the information and click "Add Other Structure" to add and return to the Coverages tab.

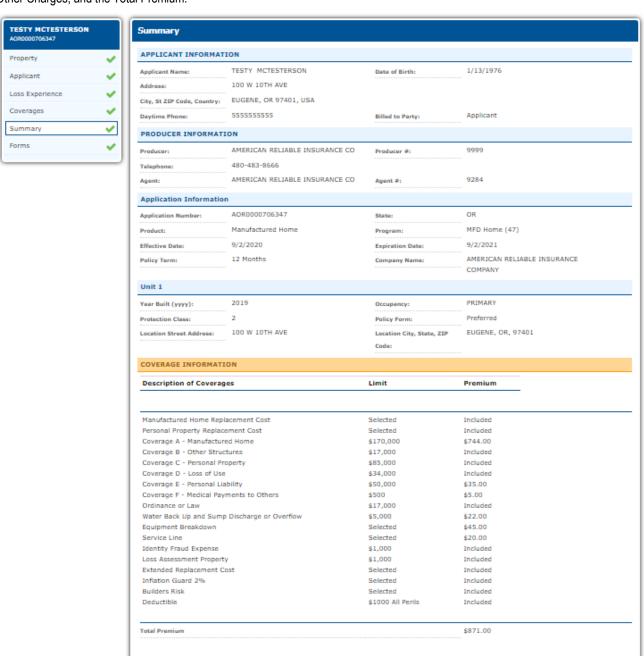


27. In some instances, you will be able to add an additional coverage limit. Below is an example where the Coverage B limit was increased by \$27,000.



28. Click "Save & Continue" to proceed to the Summary tab.

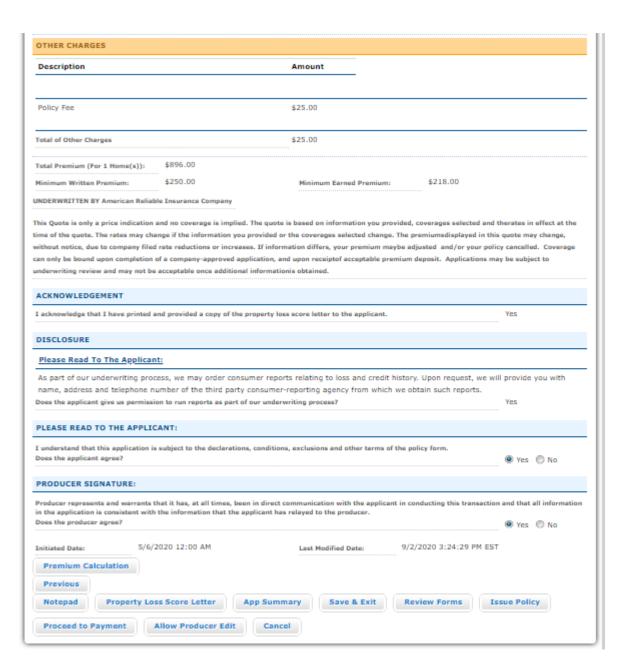
29. The Summary screen is the last tab to be completed. It displays the Applicant and Producer Information, Coverage Information, Discounts, Surcharges, Other Charges, and the Total Premium.



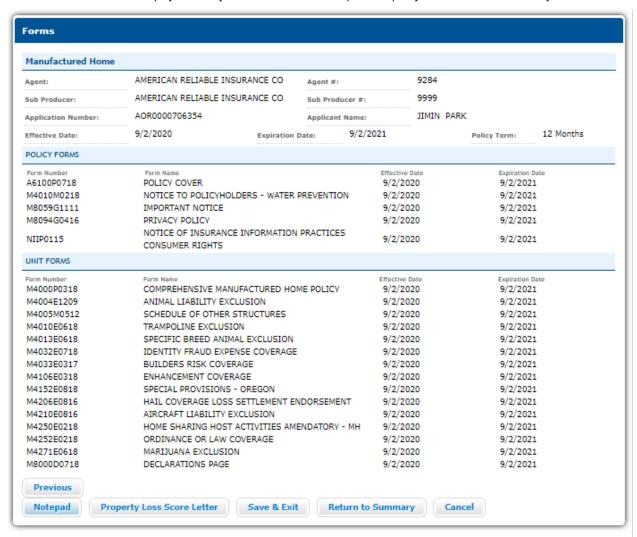
No Prior Loss Discount, In Park Discount, Newer Manufactured Home Discount, Age Of Insured Discount

Surcharges:

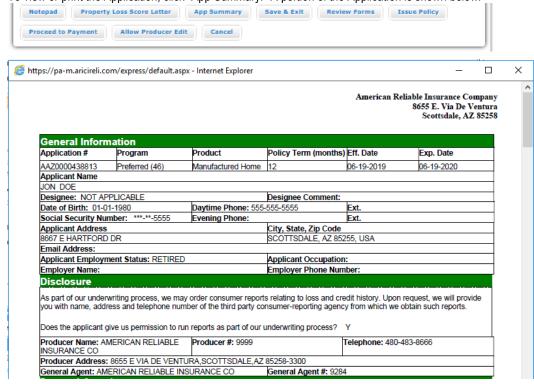
N/A



30. Click "Review Forms" to display the Policy and Unit Forms that comprise the policy. Click "Return to Summary" to exit.



31. To view or print the Application, click "App Summary." A portion of the Application is shown below.



32. Click "Issue Policy." You will see a notification with the new policy number.



33. A Submit Receipt will pop up. This will provide you any state specification information for the insured and if there are any trailing documents that need to be collected.

American Reliable Insurance Company PO Box 6002, Scottsdale, AZ, 85261 T 800.535.1333 F 480.483.0238

TESTY MCTESTERSON 100 W 10TH AVE EUGENE, OR 97401

Policy Issuance is complete. Your policy number is: I47700605.

Thank you for choosing American Reliable Insurance Company as your insurance carrier. If you have any questions about your policy please contact your producer:

AMERICAN RELIABLE INSURANCE CO 8655 E VIA DE VENTURA SCOTTSDALE,AZ 85258-3300 480-483-8666

IMPORTANT NOTICE: Personal Information about you, including information from a credit or other investigative report, may be collected from persons other than you in connection with this application for insurance and subsequent amendments and renewals. Such information as well as other personal and privileged information collected by us or our agent may in certain circumstances be disclosed to third parties without your authorization. Credit scoring information may be used to determine either your eligibility for insurance or the premium you will be charged. We may use a third party in connection with the development of your score. You have the right to review your personal information in our files and can request correction of any inaccuracies. A more detailed description of your rights and our practices regarding such information will be issued with your policy. This notice is given in compliance with the Federal Credit Reporting Act.

**FRAUD WARNING:** Any person who knowingly presents a false or fraudulent claim for payment of loss or benefit or who knowingly presents false information in an application for insurance is guilty of a crime and may be subject to restitution fines or confinement in prison, or any combination thereof.

SPECIFIC BREED ANIMAL EXCLUSION NOTICE: You should also be aware that a Specific Breed Animal Exclusion will be attached to your policy if liability was purchased and that bodily injury, property damage or any other loss or expense arising out of any occurrence involving any of the following types of animals and/or breeds of dogs will not be covered: Any animal with a previous bite history, snakes, monkeys or ostriches; Breeds of dogs include Akita, Anatolian Shepherd, Chow, Doberman, Pit Bull, Presa Canario, Rottweiler, Wolf, Wolf Hybrid, or any mix of these breeds with any other breed whether listed here or not.

34. Click "Notepad." A popup window will open for you to enter comments. Click "Submit Note >>" when complete. When finished, click X to close the window.



35. To add an Attachment, click "Attachments" on the bottom left of your screen. Click "Add an Attachment."

