



Helpful Hints

PAYMENT LOOK-UP: You see all payment information as we do. All of the information you see is to the minute. Just access the policy under *policy/billing information* and click on the *billing tab*. Generally, payments are processed and posted daily by 1pm.

NOTE A POLICY: If you ever need to note a policy simply look up the policy via *policy/billing information*, click on the *notices/memo/notes* tab and select *new note*. Type in your note and click save.

RETRIEVING DEC PAGES, APPS, ETC.: For homeowners and mobile homeowners lookup the policy under *policy/billing information*, then select the *images tab* and this will grant you access to all dec pages, notices and the application.

NON-DOLLAR ENDORSEMENTS: You can process all non-dollar endorsements (i.e. lien holder changes, mailing address changes) instantly on our website. A new dec page will be generated immediately and available for you to print out.

COVERAGE CHANGE ENDORSEMENTS: Please forward all requests for coverage changes to endorsements@westpointuw.com or fax to 727.507.7596. You can quote the coverage change online via the *Endorsements* button at the bottom of the policy history page.

CAN'T FIND A PARK OR SUBDIVISION? Simply input the first few letters of the park name and click *lookup*. A list of like names will appear in the drop down box.

CHANGE EFFECTIVE DATES? This can only be done for an HO3 or HO6 policy by utilizing the *cancel/rewrite* tool located at the bottom of the policy history page. Mobile Home policies must be rewritten in order to change the inception date.

MANUALS/BULLETINS: The manuals and bulletins for the homeowner and mobile homeowner programs are available online under the *manuals* and *bulletins* menus.

ITEMS REQUIRED TO BE SENT TO US? Generally, the only thing we require the agent to send in after uploading a policy is the premium check (premium checks go to the lockbox address listed on the reminder notice). Please note we do not accept premium financing. With direct billing, the policy, dec and invoice are mailed directly to the insured once the policy has been uploaded. We also direct bill the mortgagee if applicable. Please do not send us the signed app (UNLESS PRIVATE PROPERTY MOBILE HOME)—you should retain that in your file along with your cost estimator (required for all new business) or appraisal. Agent audits will be conducted by your marketing representative on an annual basis. Private Property Mobile Home policies require submission of signed new business application as well as front and back photos of the home.

ONLINE PAYMENTS (EFT): As the agent, you can post premium payments online via the *Payment* button at the bottom of the policy history page. This must be done using the insureds checking account information. Credit cards are not accepted.

AGENT TOOLS: Please be advised that the only documents that are mailed to the agent are underwriting memos. All other documents (i.e. DNOC's, dec pages, non-renewals, etc.) are available via agent tools utility. The agent tools can be utilized to access information regarding all of your policies.