Quick Reference—

Update Agency Information

STARWIND
COMMUNITY ASSOCIATIONS

Our website provides our agents with the ability to self-manage their agency. The tools on the website will allow our agents to amend their contact information, create diligent effort favorites, add electronic signatures, update E&O information, as well as add, remove or change users. And it is all available 24/7!

Feature	See page #
Accessing the Agency/User Management Functions	2
Individual User Self-Management Features	
• Update name, phone, fax, license number, and password	3
• Set email notification preference	3
• Set electronic signature	4
• Update/enter State License information	3
• Choose/change Multifactor Authentication	4
Online Agency Appointment Process:	
• Includes ability to (self) manage:	
• Producer agreement	8
• E&O docs compliance	8 & 9
• W-9 forms	8 & 9
• Copies of agency (entity) license	5
• Addresses, phone and fax numbers	5
• Owner and Principal information	6
• Copies of executed producer agreement on file for agency to access at any time. Includes commission schedule.	8 & 10
Electronic Diligent Effort /SL2 forms & Electronic Signatures	
• Electronic Diligent Effort forms	7
• Includes saved favorites	
• Will be completed just prior to request to bind being submitted (instead of uploading a paper form)	
• Electronic signatures	4
• Includes ability for agent to save his electronic signature, that can be placed on Diligent Effort forms, etc.	
Self-managed logins for agency personnel	
• Includes ability for agencies to designate accounting personnel for future access to make payments online	6
• Each individual needs his or her own login, logins should not be shared	
Email notification assignment	3 & 5
• Includes ability for agents to set a default email recipient at either an agency level, or an individual quote level	
• Example, you have a group email address for all website related emails such as status changes, endorsements, etc.	
• Example, specific agent has a CSR assigned to all his accounts who manages his/her policy activity	
Set Agency Premium Finance Options	11

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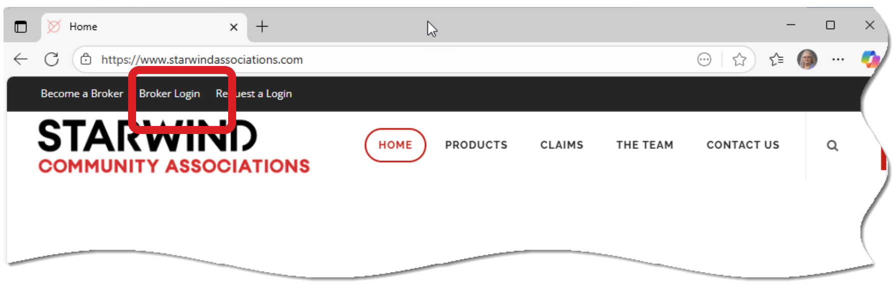
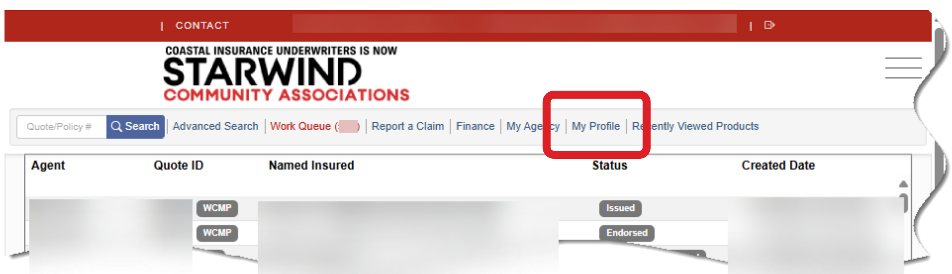
Accessing Agency Management

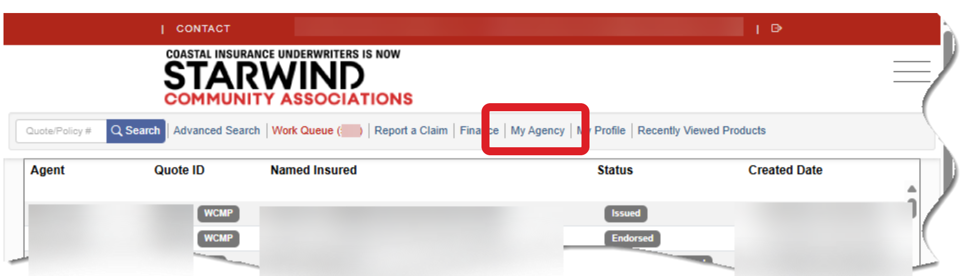
Sign into the website (www.StarwindAssociations.com).



Your login is your email address. If you do not remember your password, you can click **Forgot Your Password?** for a password reset email to be sent to you.



All users will see the option for **My Profile**. Simply click to access the individual settings to update password, phone, fax, and license number. This is also where the user can set the email preferences and upload an electronic signature.



Agency administrators will also have the **My Agency** option which will allow you to manage the agency (e.g. add/remove users, review the producer agreement, upload E&O information, amend addresses and phone numbers, etc.)

If you do not know who is the agency admin, please call us and we will assist you.

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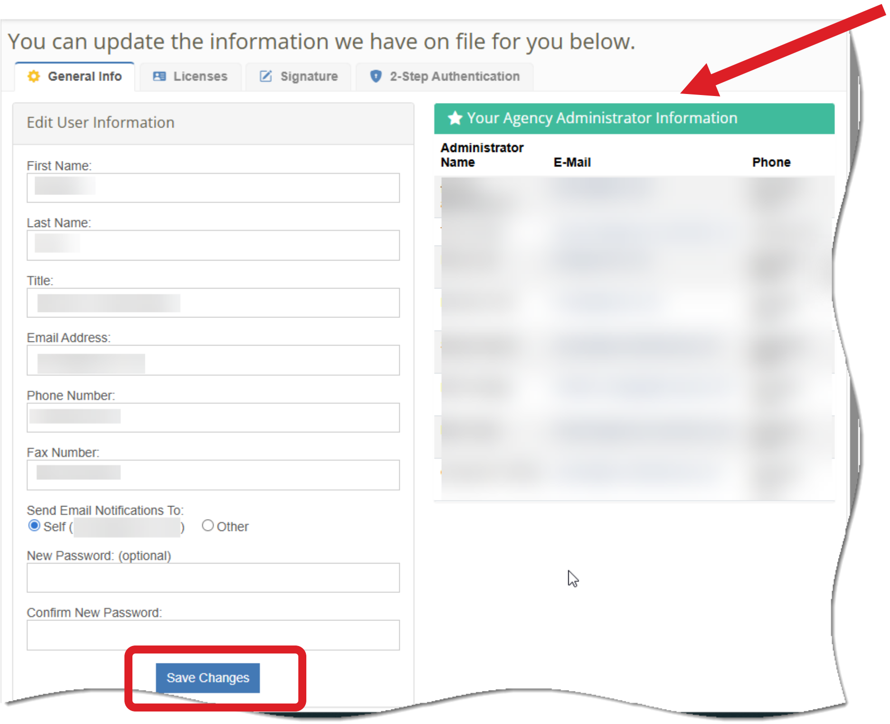
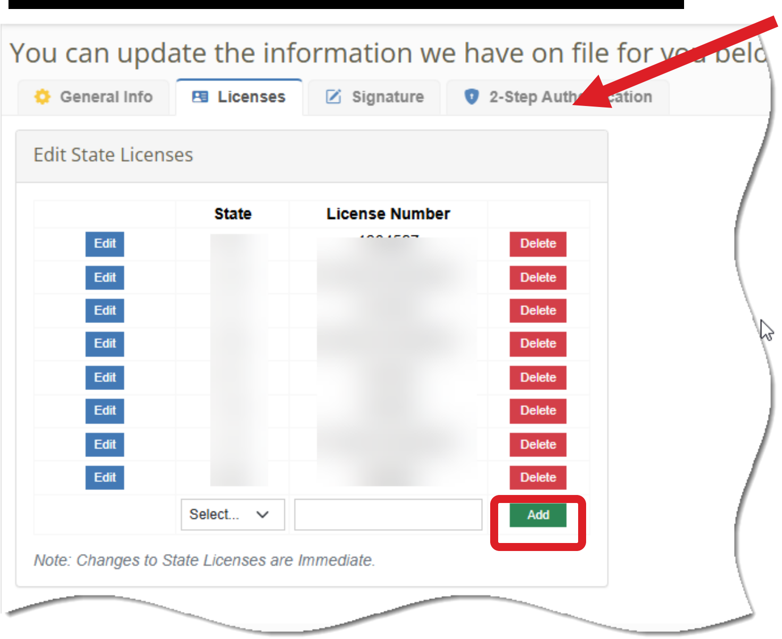
Updating User Information



Each individual user can update his or her information as needed. From the *General Info* tab, the name, title, email address, phone number, fax number, license number, and password can be updated as needed. The user can also set the email address that he/she wants to receive all of the website generated messages.

IMPORTANT: You must click the **Save Changes** button.

Update/Enter License Information



Each individual user needs to ensure that his/her state licenses have been entered correctly.

- Click **Edit** to change the information for a particular state.
- Click **Delete** to remove a state license.
- Click **Add** to add a new state license. When adding a state license, you will only have states in the dropdown selection that (1) you do not already have a license entered for, and (2) we have the agency's entity license information on file for. If you are trying to add a state that is not shown in your drop down, get with the agency administrator and have them provide your agency's entity license information first.

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Update Agency Information

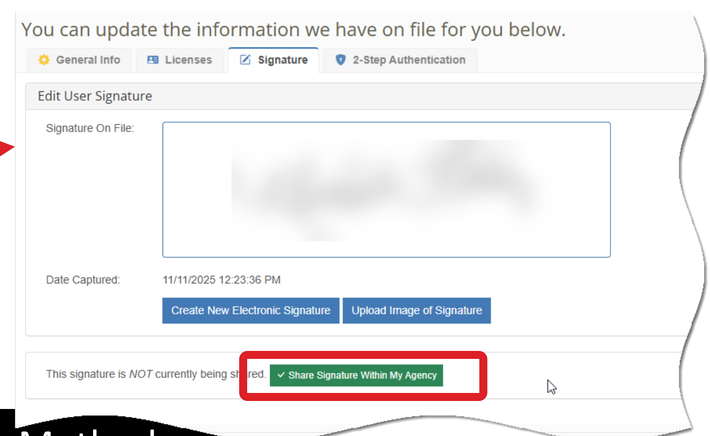
Creating an Electronic Signature

Click the **Signature** tab to access the electronic signature option.

Once there, click **Create New Electronic Signature.**

Using the mouse, sign your name, and then click **Save.** Alternatively, you can click **Upload Image of Signature** if you don't want to sign with your mouse. When uploading your signature from a digital file, the file must be in .png format.

Once completed, you have the option to redo by clicking **Create New Electronic Signature** and to share your signature with others in the agency by clicking **Share Signature Within My Agency.** This will be useful for agents who have CSRs or others working their policies and is only used for signing Diligent Effort forms.



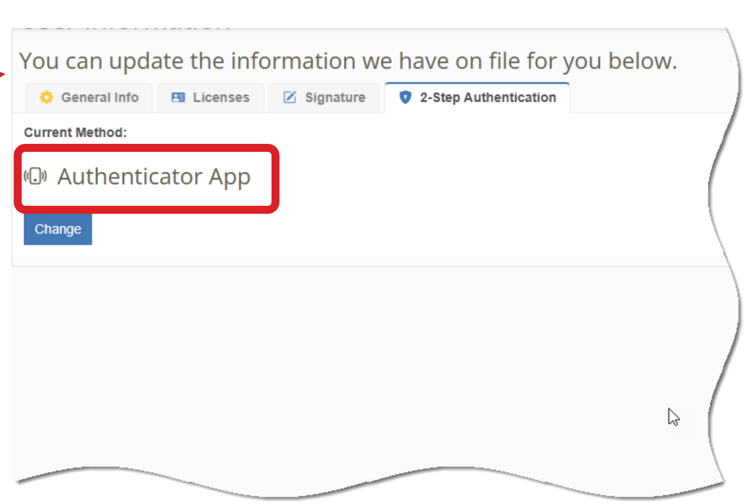
Choose/Change Multi-Factor Authentication Method

Click the **2-Step Authentication** tab to access the MFA options.

Your current choice will be shown. If you want to change it, click **Change.**

Available choices are:

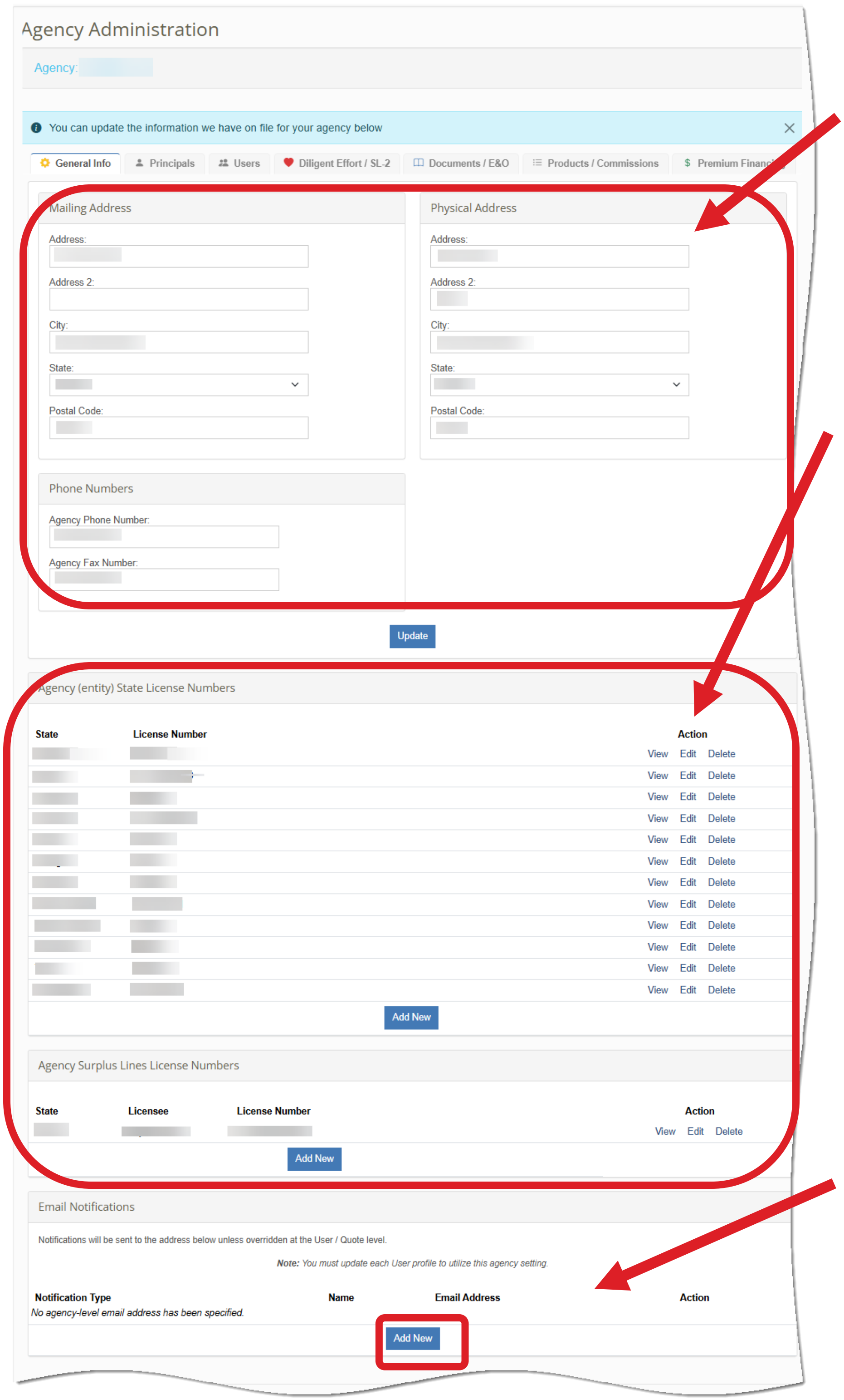
- Using a authenticator app on your phone such as Google Authenticator, Microsoft Authenticator, Twilio and Authy.
- Receive an email with a 6 digit code that is valid for 10 minutes.



Update Agency Information

STARWIND COMMUNITY ASSOCIATIONS

Updating Contact & General Information



On the *General Info* tab you can update the agency's mailing and physical address as well as the phone and fax numbers.

Make any changes (as necessary) and then click the **Update** button. If you do not click **Update**, any changes entered will not be saved.

You are required to provide a copy of the agency license (as provided by the individual state you are licensed in). You will need to upload a license for each state you want to quote in. Simply click **Add New** and then follow the prompts to upload a copy of the agency license.

Additionally, you can set up default email addresses to be used for system-generated notifications. This can be useful if:

- You have one general email that you want all system-generated emails to go to, or
- The agent has a specific CSR who needs to receive all of the emails for his/her accounts.

To enable this feature, click **Add New** and then complete the two drop downs on the popup window.

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Update Agency Information

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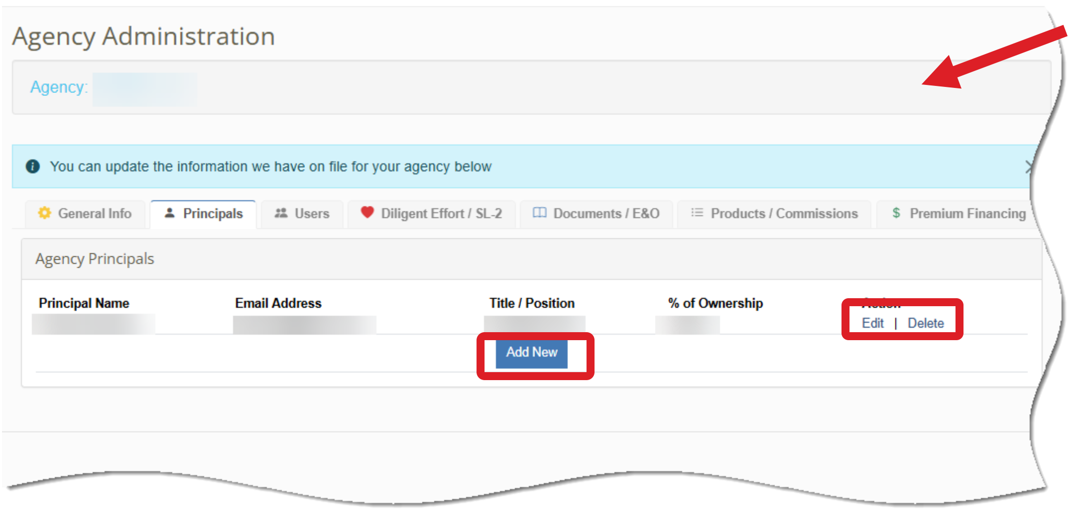
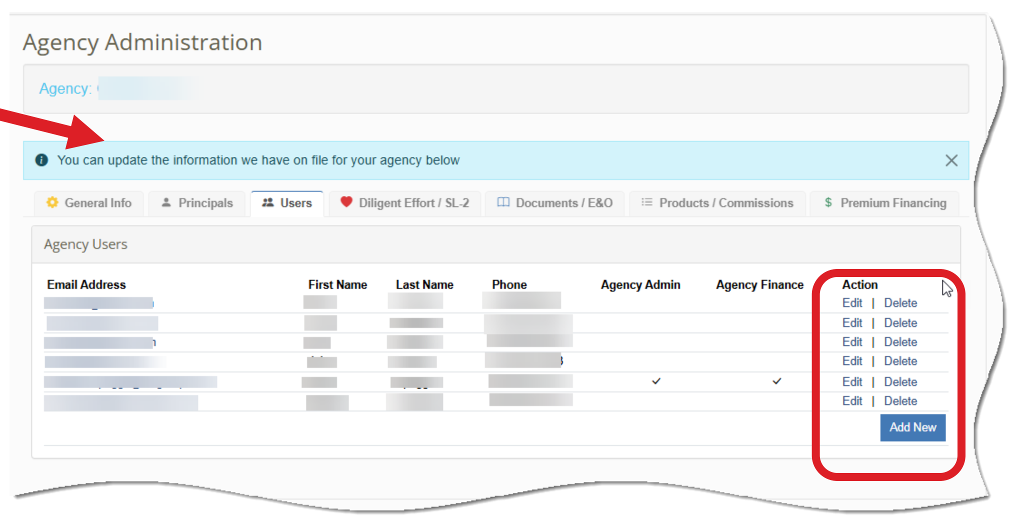
Updating Principal & Officer Information



On the *Agency Background* tab you can update the information relative to the agency's owners and officers.

Updating User Logins

On the *Users* tab you can manage all of the users for your agency. This includes adding, removing and editing as well as resetting their passwords. This is also where you can designate users as Agency Admin or Agency Finance.



You can **Edit** and **Delete** as needed. When deleting a user, you must first select the user you want to transfer all of the associated policies to.

Click **Add New** to add a new user.

NOTE: Please add user logins for each of your office personnel who needs access to the website. Please do not share logins.

Update Agency Information

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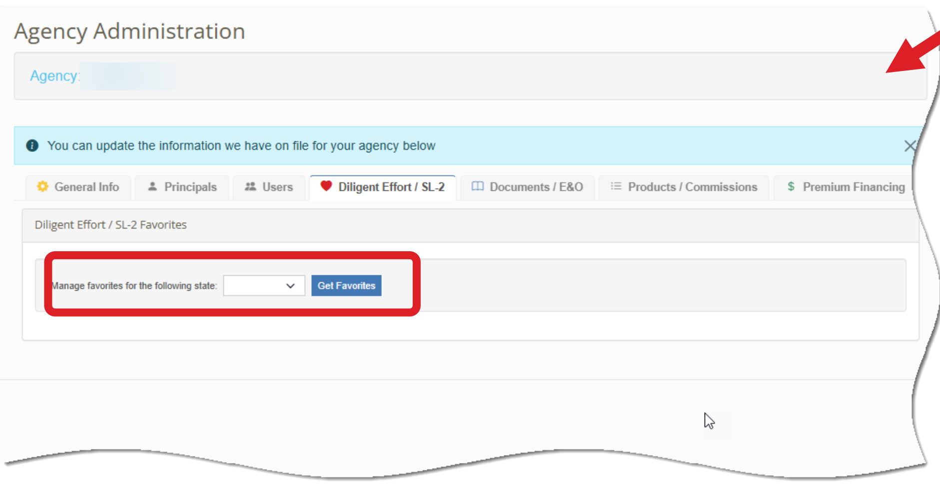
Creating Diligent Effort/SL2 Favorites



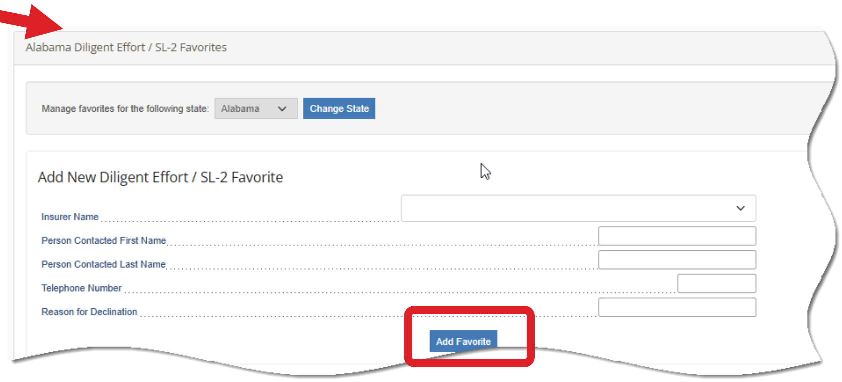
From the *Diligent Effort / SL-2 Favorites* tab, you can set favorites which will make completing the online diligent effort and SL-2 forms quick and easy.

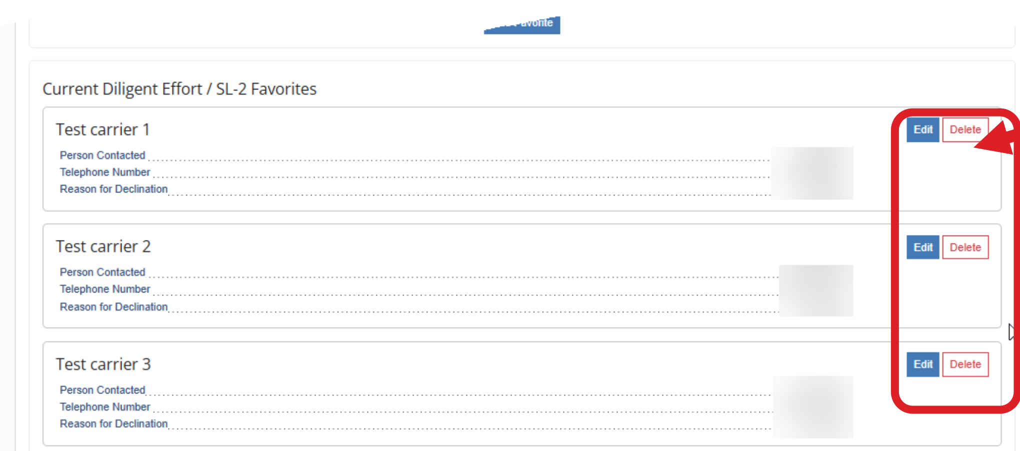
First, choose your state from the drop down and click **Get Favorites.**

Using the drop down box, choose the name of the insurance company you want to set as a favorite. If you do not see the company listed, choose **Other** and type in the name of the carrier.

Enter the contact persons name, phone number and declination reason (e.g., underwriting reasons, zip code closed, etc.).

Once all information is entered, click **Add.**





Existing carriers will be shown at the bottom of the page. You can **Edit** and **Delete** as needed.

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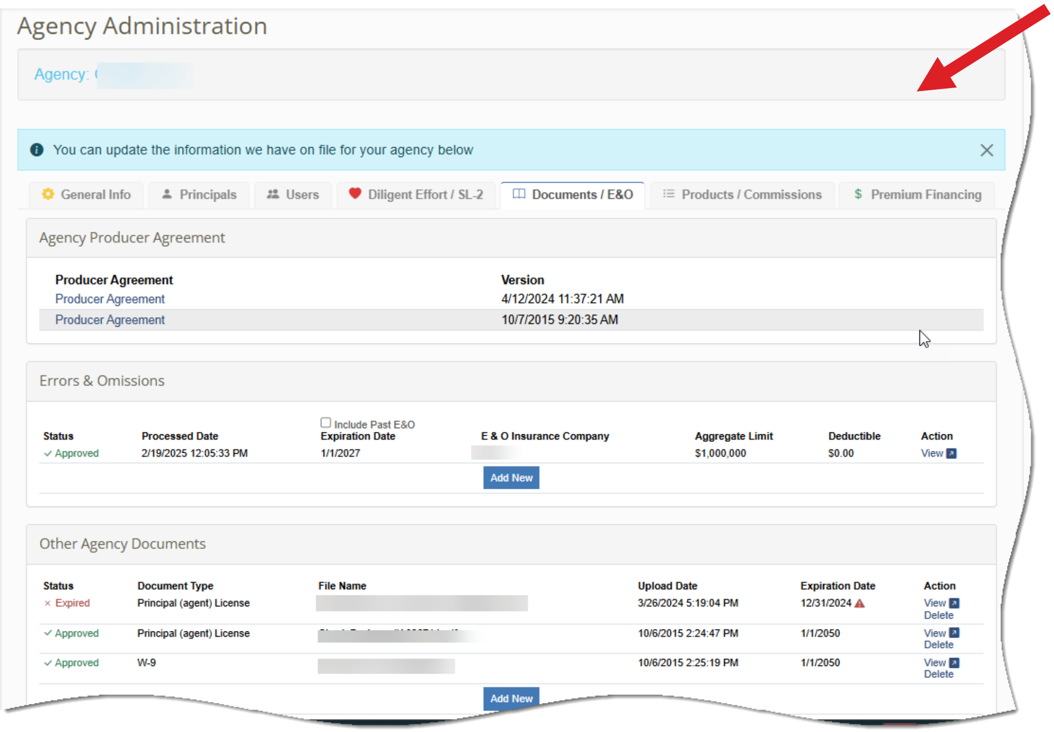
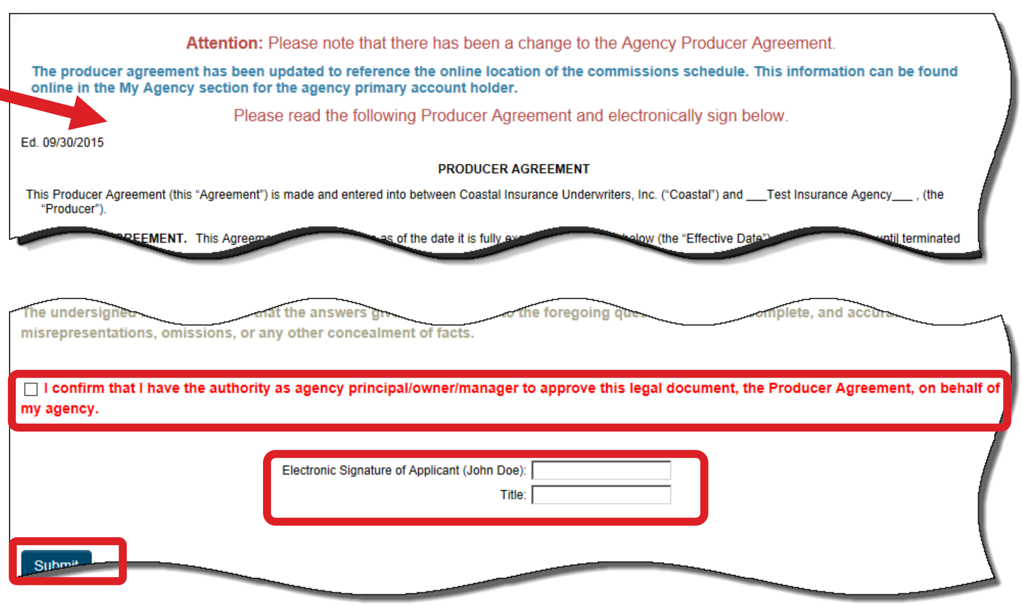
Producer Agreement, E&O, and Other Required Documents



From the *Documents/E&O* tab you can review your producer agreement and other documents as well as upload new E&O information.

If we do not have a current agent agreement on file, clicking the **Sign Current Agreement** button will bring up the producer agreement. Review the agreement and then at the bottom:

1. Review and check the confirmation statement
2. Type in your name and the date.
3. Click **Submit.**



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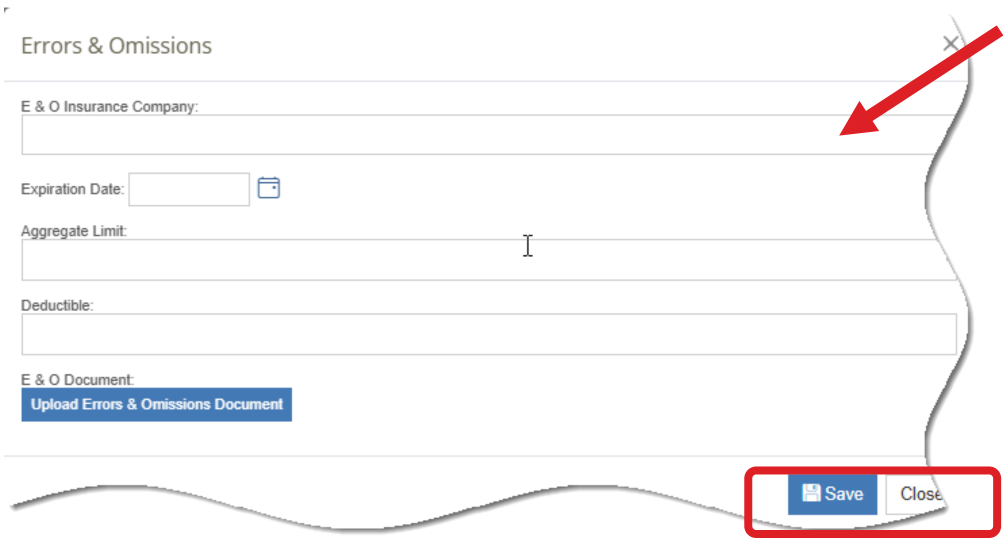
Uploading New Errors & Omissions



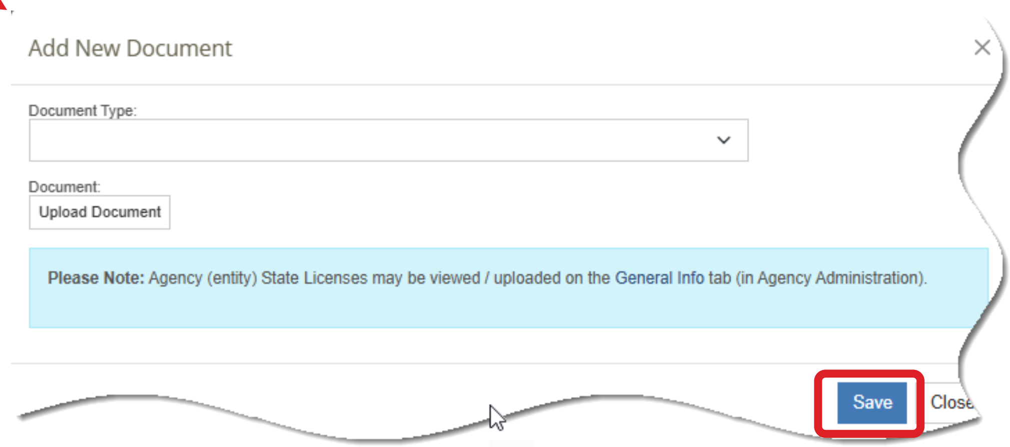
Clicking the **Add New** button in the Error's & Omissions section will bring up the Errors & Omissions popup.

To upload new E&O information:

1. Complete the *E&O Insurance Company*, *Limits*, *Deductible*, and *Expiration Date* fields.
2. Click **Upload Errors & Omissions Document** to upload a copy of the policy.
3. Click **Submit.**

Uploading Principal License, W9, & Other Documents

Clicking the **Add New** button in the Other Documents section will bring up the Add New Document popup.



From here:

1. Choose the document type (Principal License, W9, or other).
2. Click **Upload** Document to attach the document.
3. Click **Save.**

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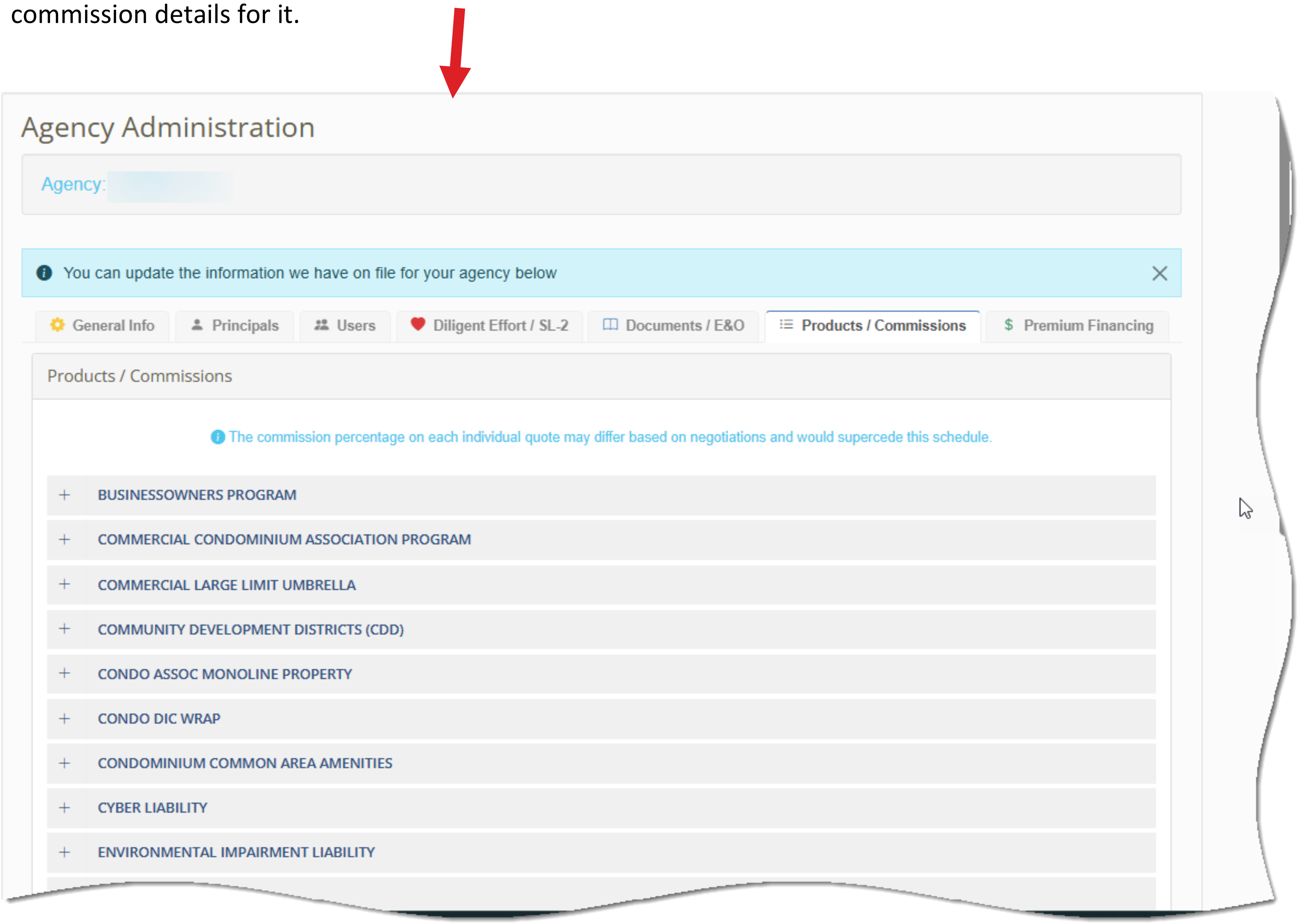
Viewing Products/Commissions Information

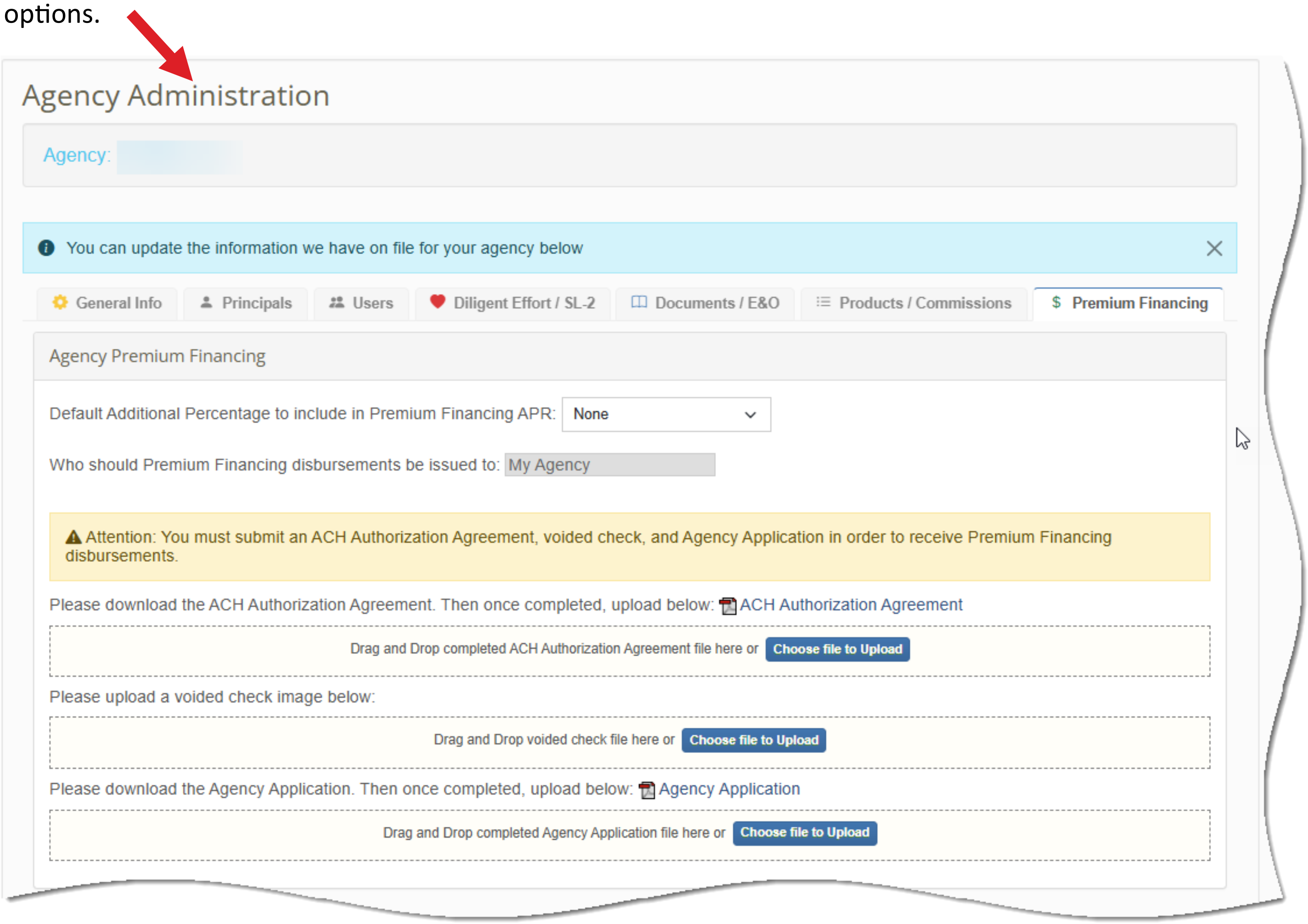
The *Products/Commissions* tab is where you can view the products your agency is appointed for AND the commission rate* for each product. Click the name of each program to open product and see the commission details for it.



*The commission percentage on each individual quote may differ based on negotiations and would supersede this schedule.

Setting Premium Financing Options

If you elect to use our optional premium financing program with First Insurance Funding, you can choose to add percentage points to the contract (which will then be additional income to the agency) as well as determine where the funds should be released. The *Premium Financing* tab is where you can set those options.



To set up the financing with First Insurance Funding:

- Choose a default percentage to include in premium financing agreements. This can be changed on a per account basis.
- Choose whether the proceeds should be sent to your agency or directly to the carrier.
- Download, sign, and then upload the signed ACH Authorization Agreement.
- Upload a voided check.
- Download, sign, and then upload the signed Agency Application for First Insurance Funding.