

# Update Agency Information

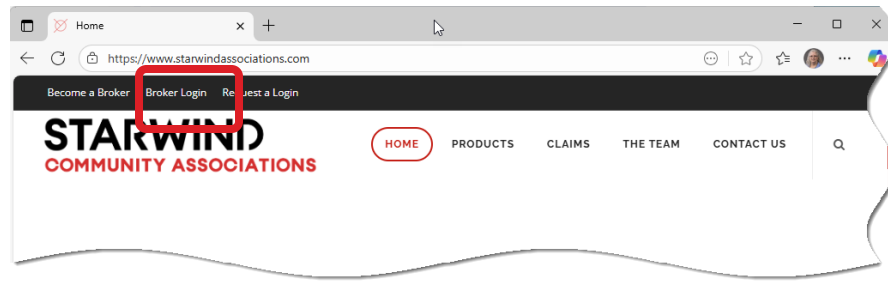
Our website provides our agents with the ability to self-manage their agency. The tools on the website will allow our agents to amend their contact information, create diligent effort favorites, add electronic signatures, update E&O information, as well as add, remove or change users. And it is all available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

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• Example, specific agent has a CSR assigned to all his accounts who manages his/her policy activity	
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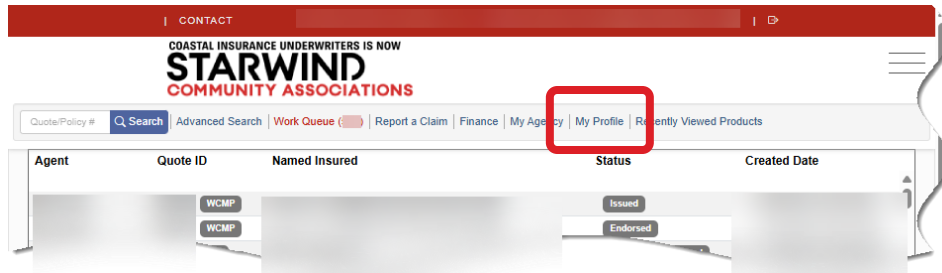
# Update Agency Information

## Accessing Agency Management

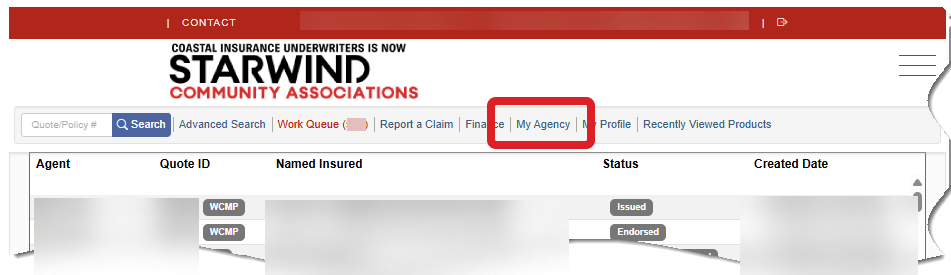
Sign into the website (www.StarwindAssociations.com).



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.

# Update Agency Information

## Updating User Information

You can update the information we have on file for you below.

General Info | Licenses | Signature | 2-Step Authentication

★ Your Agency Administrator Information

Administrator Name | E-Mail | Phone

First Name:

Last Name:

Title:

Email Address:

Phone Number:

Fax Number:

Send Email Notifications To: ☒ Self ☐ Other

New Password: (optional)

Confirm New Password:

**Save Changes**

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

You can update the information we have on file for you below.

General Info | Licenses | Signature | 2-Step Authentication

Edit State Licenses

	State	License Number	
<b>Edit</b>			<b>Delete</b>
<b>Edit</b>			<b>Delete</b>
<b>Edit</b>			<b>Delete</b>
<b>Edit</b>			<b>Delete</b>
<b>Edit</b>			<b>Delete</b>
<b>Edit</b>			<b>Delete</b>
<b>Edit</b>			<b>Delete</b>
<b>Edit</b>			<b>Delete</b>
<b>Edit</b>			<b>Delete</b>
	Select... ▼	<input type="text"/>	<b>Add</b>

Note: Changes to State Licenses are Immediate.

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.

# Update Agency Information

## Creating an Electronic Signature

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

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

You can update the information we have on file for you below.

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.

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.

# Update Agency Information

## Updating Principal & Officer Information

Agency Administration

Agency:

You can update the information we have on file for your agency below

General Info | **Principals** | Users | Diligent Effort / SL-2 | Documents / E&O | Products / Commissions | Premium Financing

Agency Principals

Principal Name	Email Address	Title / Position	% of Ownership	Action
				Edit   Delete

[Add New](#)

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.

Agency Administration

Agency:

You can update the information we have on file for your agency below

General Info | Principals | **Users** | Diligent Effort / SL-2 | Documents / E&O | Products / Commissions | Premium Financing

Agency Users

Email Address	First Name	Last Name	Phone	Agency Admin	Agency Finance	Action
						Edit   Delete
						Edit   Delete
						Edit   Delete
						Edit   Delete
						Edit   Delete
						Edit   Delete
						Edit   Delete

[Add New](#)

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

## Creating Diligent Effort/SL2 Favorites

Agency Administration

Agency:

You can update the information we have on file for your agency below

General Info | Principals | Users | **Diligent Effort / SL-2** | Documents / E&O | Products / Commissions | Premium Financing

Diligent Effort / SL-2 Favorites

Manage favorites for the following state:  **Get 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**.

Alabama Diligent Effort / SL-2 Favorites

Manage favorites for the following state: Alabama **Change State**

Add New Diligent Effort / SL-2 Favorite

Insurer Name

Person Contacted First Name

Person Contacted Last Name

Telephone Number

Reason for Declination

**Add Favorite**

Current Diligent Effort / SL-2 Favorites

Test carrier 1

Person Contacted

Telephone Number

Reason for Declination

**Edit** **Delete**

Test carrier 2

Person Contacted

Telephone Number

Reason for Declination

**Edit** **Delete**

Test carrier 3

Person Contacted

Telephone Number

Reason for Declination

**Edit** **Delete**

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

# Update Agency Information

## Producer Agreement, E&O, and Other Required Documents

Agency Administration

Agency:

You can update the information we have on file for your agency below

General Info | Principals | Users | Diligent Effort / SL-2 | **Documents / E&O** | Products / Commissions | Premium Financing

Agency Producer Agreement

Producer Agreement	Version
Producer Agreement	4/12/2024 11:37:21 AM
Producer Agreement	10/7/2015 9:20:35 AM

Errors & Omissions

Status	Processed Date	<input type="checkbox"/> Include Past E&O Expiration Date	E & O Insurance Company	Aggregate Limit	Deductible	Action
✓ Approved	2/19/2025 12:05:33 PM	1/1/2027		\$1,000,000	\$0.00	View

Add New

Other Agency Documents

Status	Document Type	File Name	Upload Date	Expiration Date	Action
✗ Expired	Principal (agent) License		3/26/2024 5:19:04 PM	12/31/2024	View Delete
✓ Approved	Principal (agent) License		10/6/2015 2:24:47 PM	1/1/2050	View Delete
✓ Approved	W-9		10/6/2015 2:25:19 PM	1/1/2050	View Delete

Add New

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**.

**Attention:** Please note that there has been a change to the Agency Producer Agreement.

The producer agreement has been updated to reference the online location of the commissions schedule. This information can be found online in the My Agency section for the agency primary account holder.

Please read the following Producer Agreement and electronically sign below.

Ed. 09/30/2015

**PRODUCER AGREEMENT**

This Producer Agreement (this "Agreement") is made and entered into between Coastal Insurance Underwriters, Inc. ("Coastal") and \_\_\_Test Insurance Agency\_\_\_, (the "Producer").

AGREEMENT. This Agreement shall be in full force and effect as of the date it is fully executed by both parties below (the "Effective Date") and shall be terminated upon the expiration of the term set forth herein.

The undersigned hereby certifies that the answers given to the foregoing questions are true, complete, and accurate, and that the undersigned is not making any misrepresentations, omissions, or any other concealment of facts.

☐ I confirm that I have the authority as agency principal/owner/manager to approve this legal document, the Producer Agreement, on behalf of my agency.

Electronic Signature of Applicant (John Doe):

Title:

**Submit**



# Update Agency Information

## 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.

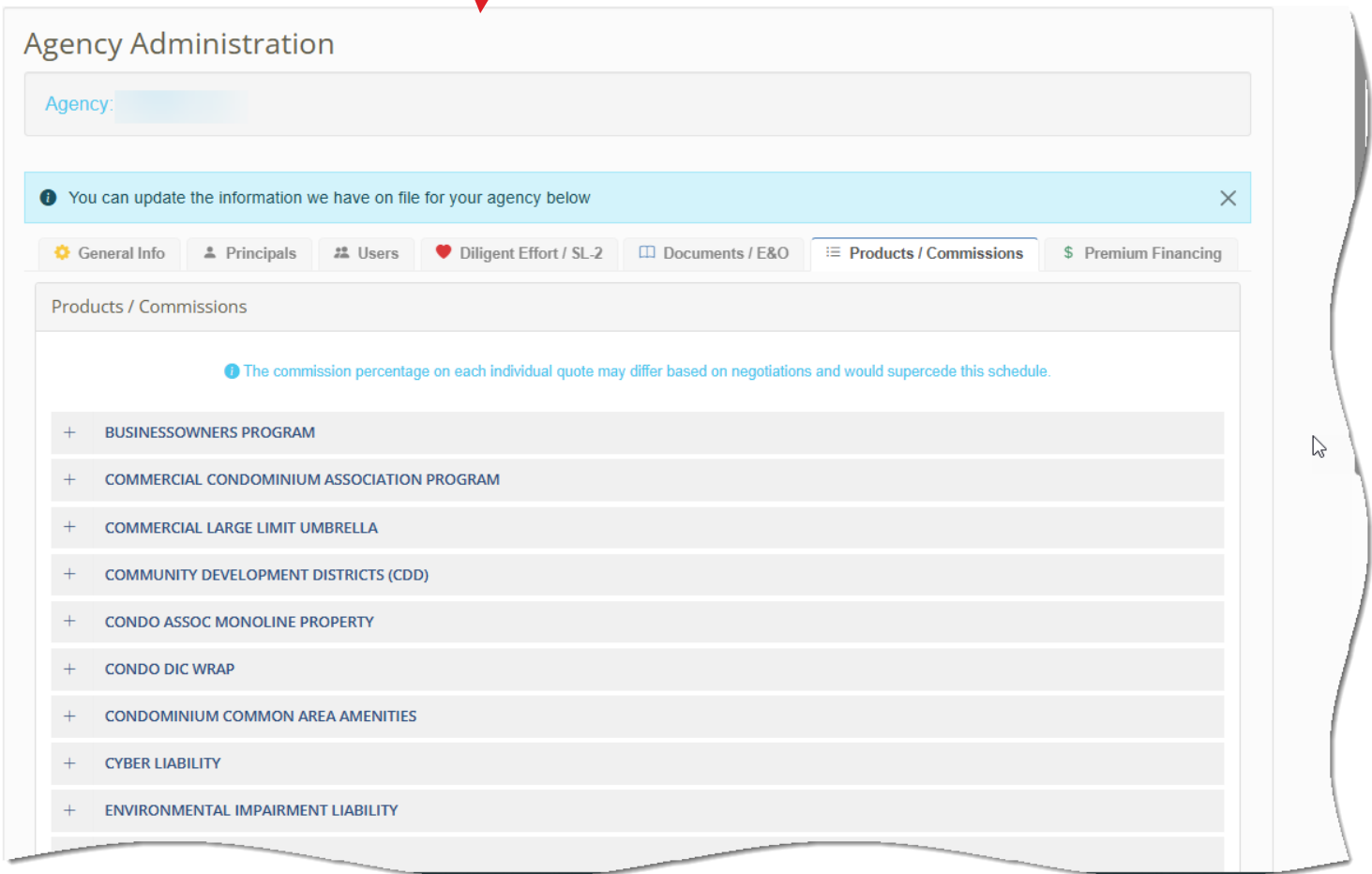
From here:

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

# Update Agency Information

## 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 screenshot displays the 'Agency Administration' interface. At the top, there is a search bar labeled 'Agency:'. Below it, a light blue notification bar states: 'You can update the information we have on file for your agency below'. The navigation bar includes several tabs: 'General Info', 'Principals', 'Users', 'Diligent Effort / SL-2', 'Documents / E&O', 'Products / Commissions' (which is highlighted), and 'Premium Financing'. The 'Products / Commissions' section is active, showing a list of products with expandable details (indicated by '+' icons). A note at the top of this section states: 'The commission percentage on each individual quote may differ based on negotiations and would supersede this schedule.'

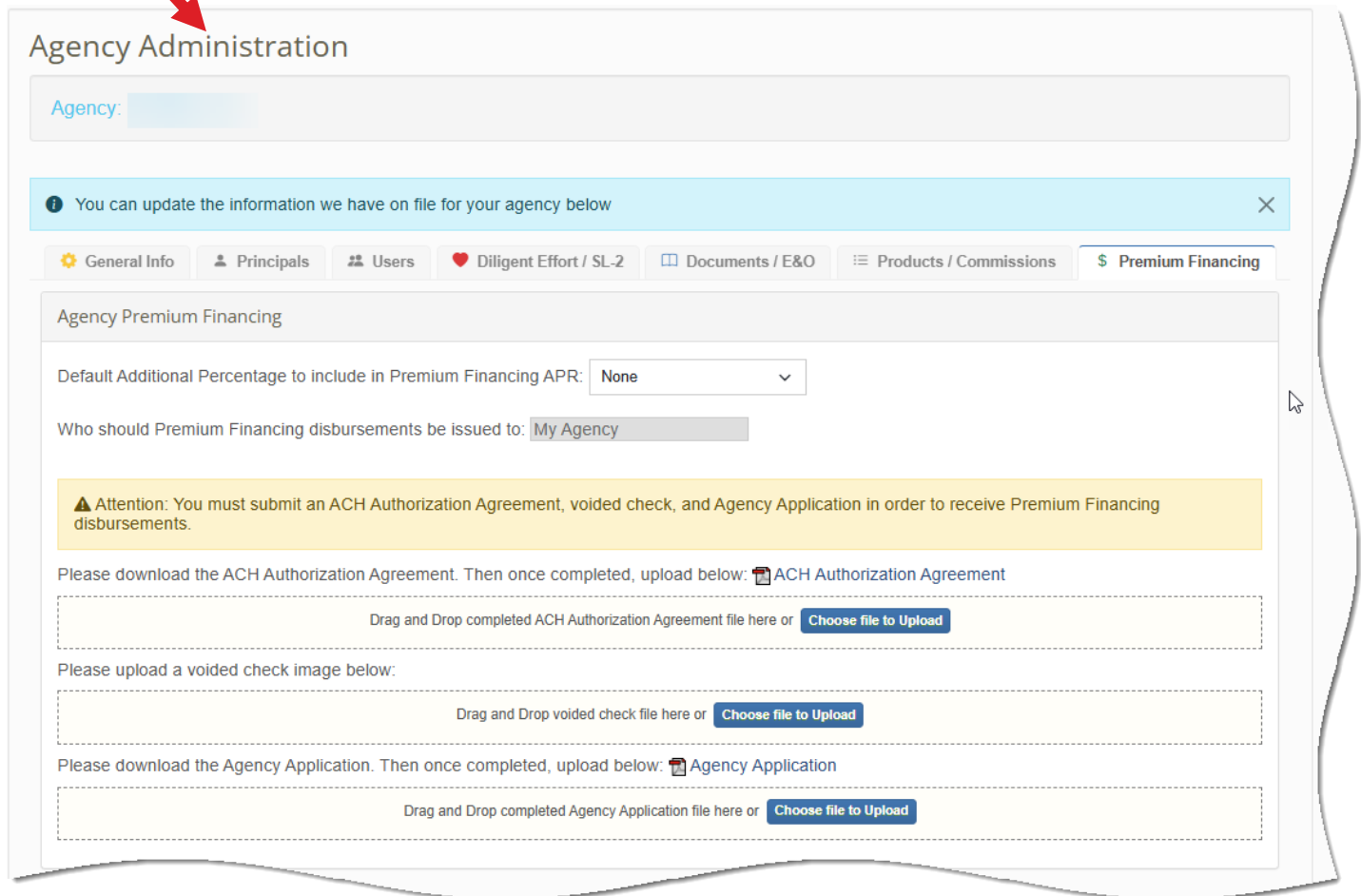
Product Name
BUSINESSOWNERS PROGRAM
COMMERCIAL CONDOMINIUM ASSOCIATION PROGRAM
COMMERCIAL LARGE LIMIT UMBRELLA
COMMUNITY DEVELOPMENT DISTRICTS (CDD)
CONDO ASSOC MONOLINE PROPERTY
CONDO DIC WRAP
CONDOMINIUM COMMON AREA AMENITIES
CYBER LIABILITY
ENVIRONMENTAL IMPAIRMENT LIABILITY

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

# Update Agency Information

## 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.



The screenshot shows the 'Agency Administration' interface. A red arrow points to the 'Premium Financing' tab in the top navigation bar. The 'Premium Financing' tab is active, displaying the 'Agency Premium Financing' section. This section includes a dropdown for 'Default Additional Percentage to include in Premium Financing APR' (set to 'None') and a text field for 'Who should Premium Financing disbursements be issued to:' (set to 'My Agency'). Below these fields is a yellow warning box stating: 'Attention: You must submit an ACH Authorization Agreement, voided check, and Agency Application in order to receive Premium Financing disbursements.' Under the warning box are three upload sections: 'Please download the ACH Authorization Agreement. Then once completed, upload below:' with a file upload area and a 'Choose file to Upload' button; 'Please upload a voided check image below:' with a file upload area and a 'Choose file to Upload' button; and 'Please download the Agency Application. Then once completed, upload below:' with a file upload area and a 'Choose file to Upload' button.

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.