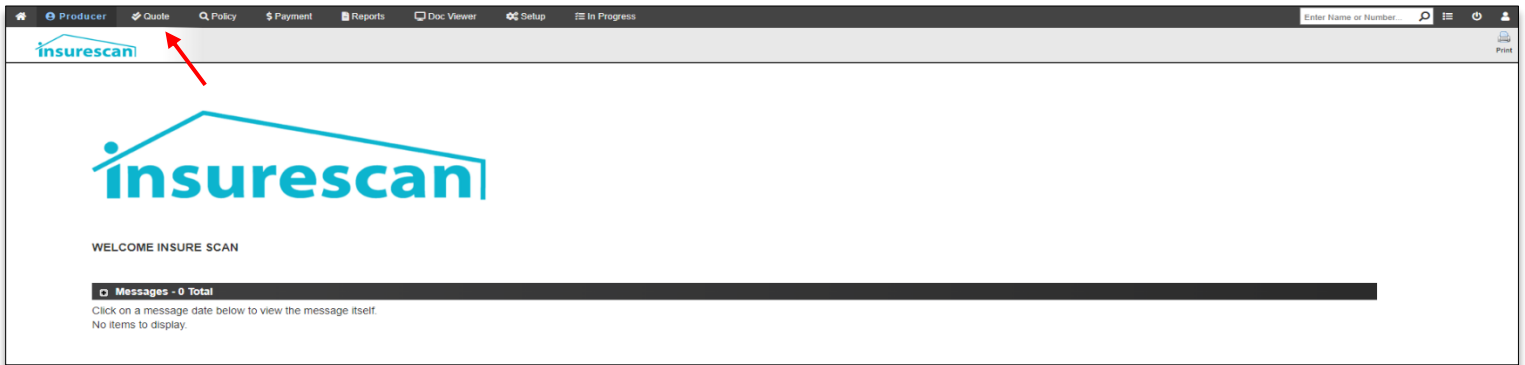


How To Quote and Bind a Policy in InsureScan's Policy Admin System

Beginning the Quote



Access the system and log in using the link and credentials given to you in the Welcome Pack. You will be directed to the above screen. To start a new quote, simply click on Quote at the top of the screen. Click the green +New Quote button at the top right on the next screen. On the Product Selection screen, choose the effective date for the policy – this cannot be backdated – then click Start Quote.

Quoting Process

General Info

- Location
- Coverages
- Drivers
- Vehicles

Insured Information

Applicant: First: BRENDA, Middle: MIDDLE, Last: LAST, Suffix: SUFFIX

Mobile/Cell #: [Empty]

Email: EMAIL

Policy Information

Policy Term: 6 MONTH, Effective Date: 08/16/2022, Expiration Date: 2/16/2023

Please correct the missing or invalid information.

Continue

Fill in the required information (highlighted yellow) on each section. For example, on the General Info screen, the required info is First and Last name. Note that the phone number and email sections are not required at this stage, but will be required later, so you may choose to go ahead and fill those in as well. Click the 'Continue' button.

General Info

- Location
- Coverages
- Drivers
- Vehicles

Garaging Address

Address 1: 123 TEST ST, Address 2: ADDRESS2, Zip: 36830, City: AUBURN, County: LEE, State: AL

Validate Address

Mailing Address

Use Garaging Location

123 TEST ST, AUBURN, AL, 36830

Continue

On the Location screen, fill in the Insured's garaging address. Validate the address. If the Insured's mailing address is different than the garaging address, input that as well. The 'Use Garaging Location' box will always be checked until you uncheck it. Once you do, you will get a second section that looks exactly like the first. Fill in the mailing address and validate. Click Continue.

Quote **Alabama 6 Month · 08/10/2022**
Personal Auto

General Info

Location

Coverages

Drivers

Vehicles

Policy Coverages / Discounts / Surcharges

Bodily Injury ?	25,000	50,000	<input type="checkbox"/> Transfer Discount
Property Damage ?	25,000		<input type="checkbox"/> Pay In Full
UM Bodily Injury ?	REJECT	REJECT	<input type="checkbox"/> Homeowner
Medical Payments ?	REJECT		

[Continue](#)

On the Coverages section, the Insured may choose to add Uninsured Motorists and/or Med Pay coverage. Med Pay has multiple options. Select any discounts that may apply on the right of the screen. Checking Transfer Discount or Homeowner will prompt a new section to appear, asking for more information for each discount. Click Continue. If the Insured wants to Pay in Full for the policy, you MUST check it on this screen.

General Info

Location

Coverages

Drivers

Vehicles

[Add Driver](#)

Driver 1 - BRENDA SMITH

First Name: BRENDA	License Type: ALABAMA DL
Middle Name: MIDDLE	Lic Status: ACTIVE
Last Name: SMITH	Lic Num/State: LICENSE NUMBER AL
Suffix: --SELECT--	MVR Status: REQUESTED
Driver Type: RATED	
Gender: --SELECT--	
Marital Status: --SELECT--	
Date of Birth: mm/dd/yyyy Age: _____	
Date Licensed: mm/dd/yyyy Yrs Lic: _____	
Relation to Insured: INSURED	
<input type="checkbox"/> SR22 <input type="checkbox"/> Resides Out of State <input type="checkbox"/> Accident Prev. Course	

[Accidents/Violations](#)

On the Drivers section, you will input the rest of the Insured's information and add other Rated or Excluded drivers, if any. If you list Driver 1 as married, you MUST add the spouse, whether they are rated or excluded. To add a driver, click the green Add Driver button at the top right. Note that the License Number box is not highlighted at this stage, but will be required later. You may choose to add if a driver requires an SR22, or if they have taken an accident prevention course (both have secondary dropdowns). There is also a section to add violations if the specific date and type of violation are known. If so, click New Violation and fill out. Click continue.

General Info

Location

Coverages

Drivers

Vehicles

[Add Vehicle](#)

Vehicle 1 -

<p style="text-align: center; margin-bottom: 5px;">Vehicle Lookup</p> <p>VIN: VIN</p> <p>Usage: PERSONAL</p> <p>Body Type: NOT ASSIGNED</p> <p>Cost New: 0</p> <p style="text-align: center; margin-top: 5px;">Show/Hide Details</p>	<p>OTC: 500</p> <p>COLL: 500</p> <p>Towing: REJECT</p> <p>Rental Reimbursement: REJECT</p> <p><input checked="" type="checkbox"/> Vehicle Photos Received</p> <p><input checked="" type="checkbox"/> Use default garaging address</p> <p>Garaging Address: 123 TEST ST TUSKEGEE, AL, 36083</p> <p>Special Equipment</p> <p><input type="checkbox"/> 25% Surcharge ?</p> <p><input type="checkbox"/> 50% Surcharge ?</p>
--	---

Lienholders: None [New Lienholder](#)

Vehicle 1 - 2012 HYUNDAI SANTA FE SE

Input VIN

Year: 2012

Make: HYUNDAI

Model: SANTA FE SE

OTC: REJECT

COLL: REJECT

Towing: REJECT

Rental Reimbursement: REJECT

Year	BodyType	Symbol	Restraint	Brakes	EngSize	Cyl	4x4	DayLt	Theft	WBase	ClassCd	
5XYZH4AG&C	2012	UTL4X24D	16	R	S	3.5	6	0	N	A	106.3	93
KM8ZH4AG&C	2012	UTL4X24D	16	R	S	3.5	6	0	N	A	106.3	93

Usage: PERSONAL

Body Type: 4-DR SEDAN

Cost New: 35001

Show/Hide Details

Use default garaging address

Garaging Address: 45 TEST WAY
ALEX CITY, AL, 35010

Lienholders: None **New Lienholder**

In the 'Vehicles' tab, you may input the vehicle's description, or you may input the VIN number. You can toggle the views for these by clicking the Input VIN / Vehicle Lookup button at the top of the box. When inputting the vehicles's description, a drop down will show with a generated VIN. You must choose one of these VINs to be able to proceed.

This is also where the Insured can chose to accept or reject OTC and Collision coverage, Towing coverage, and Rental Reimbursement. These all have more than one option. If either OTC and Collision is selected, the Insured then has access to add a Special Equipment surcharge. If there is a lienholder on the car, add the lienholder here. To add more vehicles, click the green 'Add Vehicle' button at the top right of the screen. Check Acknowledge and click Rate.

insurescan

INSURESCAN MGA, LLC - INITIAL RATING Quote Estimate Q0000208

Policy Coverages:

Bodily Injury \$25,000 / \$50,000

Property Damage \$25,000 per accident

Details

Total Premium: \$231.00
This quote is based on information provided. These discounts may vary depending on coverage selections. Your local agent is here to answer any questions you may have to help make sure you get the right coverages at the lowest possible rate.

Payment Plans

Plan Name	Down Pay	Installment	Installment Fee	Total Installment	First Installment Due	Installment Count
Pay In Full (100.00%)	\$ 256.00	\$ 0.00	\$ 0.00	\$ 0.00	0 Day(s) after inception	0 Installments
Direct Bill 20% Down 5 Pay (20.00%)	\$ 51.20	\$ 41.96	\$ 6.00	\$ 47.96	1 Month(s) after inception	5 Installments
Recurring 20% Down 5 Pay (20.00%)	\$ 51.20	\$ 41.96	\$ 6.00	\$ 47.96	1 Month(s) after inception	5 Installments

NOTES:
ALL FEES AS EARNED

This is the screen that shows when bridging from TurboRater. Follow the rest of these steps after bridging. You will receive an initial rating for the quote. This does not include an MVR. You may click the Details button for a full list of the details of the quote. To edit the quote, click the Requote button at the top of the screen. You will go through all the previous screens again. All information will still be recorded. To continue to the Application, click the Submit button at the top of of the screen.

Application Review

Contact Information

Mobile: Mobile

Phone: Phone

Email: EMAIL Opt in for paperless policy documents

Notifications/Alerts: None Text/Mobile Email Both [Send Sample/Test Alert](#)

You will go through all previous screens once more and confirm all information with the Insured, and input any required information that you could previously skip during the quote. Although not required, we highly recommend providing the Insured's contact information, as we will send them reminders about their policy, as well as an invite to sign up for our Insured Web portal where they can view their policy, make payments, and access their ID cards.

Submission Q00000210 · Quote
HENRY CAVILL · GATEWAY INSURANCE COMPANY · Personal Auto ✕

Policy

Insured

Location

Coverages

Drivers

Vehicles

App Questions

	Yes	No	App Questions
	<input type="radio"/>	<input type="radio"/>	1) Does applicant have collision coverage with another company on any auto?
	<input type="radio"/>	<input type="radio"/>	2) Is any auto used to make regular and frequent trips beyond a 50-mile radius?
	<input type="radio"/>	<input type="radio"/>	3) Is any auto used for any commercial or business purposes?
	<input type="radio"/>	<input type="radio"/>	4) Is any auto used for rideshare (TNC), delivery or vehicle sharing?
	<input type="radio"/>	<input type="radio"/>	5) Has the Applicant or any other operator of the automobile ever had: Epilepsy, Stroke, Heart attack, Diabetes, Loss of limb, Loss of Eye, Cerebral palsy, Mental illness diagnosed? If Yes, enter which condition and Medical Health Statement AL011-112021 is required.

I acknowledge that the information I am submitting is accurate.

Acknowledge

There will be a new 'App Questions' screen after the vehicles sections. Answer all questions and add any comments that you may be prompted for. Check Acknowledge, and then click Rate.

Credits / Surcharges Applied
None

Total Premiums \$231.00
* Policy Fee \$25.00

TOTAL POLICY CHARGES \$256.00

Payment Plans

Plan Name	Down Pay	Installment	Installment Fee	Total Installment	First Installment Due	Installment Count
Pay In Full (100.00%)	\$ 256.00	\$ 0.00	\$ 0.00	\$ 0.00	0 Day(s) after inception	0 Installments
Direct Bill 20% Down 5 Pay (20.00%)	\$ 51.20	\$ 41.96	\$ 6.00	\$ 47.96	1 Month(s) after inception	5 Installments
Recurring 20% Down 5 Pay (20.00%)	\$ 51.20	\$ 41.96	\$ 6.00	\$ 47.96	1 Month(s) after inception	5 Installments

NOTES:
ALL FEES AS EARNED

This is a quote not an insurance policy. Rates are subject to company approval.

Re-work Policy

Order Consumer Reports

On the next screen, there will be another break down of the quote. You may Re-work the Policy if needed with the button at the bottom left of the screen. All information will still be recorded. Once the Insured is ready to continue, click Order Consumer Reports at the bottom right of the screen to pull the MVR. The screen will update with the MVR results calculated into the quote. Once you arrive at this screen, or any after, you may leave the quote and return to it at a later time.

Credits / Surcharges Applied
None

Total Premiums \$231.00
* Policy Fee \$25.00

TOTAL POLICY CHARGES \$256.00

Payment Plans

Plan Name	Down Pay	Installment	Installment Fee	Total Installment	First Installment Due	Installment Count
Pay In Full (100.00%)	\$ 256.00	\$ 0.00	\$ 0.00	\$ 0.00	0 Day(s) after inception	0 Installments
Direct Bill 20% Down 5 Pay (20.00%)	\$ 51.20	\$ 41.96	\$ 6.00	\$ 47.96	1 Month(s) after inception	5 Installments
Recurring 20% Down 5 Pay (20.00%)	\$ 51.20	\$ 41.96	\$ 6.00	\$ 47.96	1 Month(s) after inception	5 Installments

NOTES:
ALL FEES AS EARNED

This is a quote not an insurance policy. Rates are subject to company approval.

Re-work Policy

Payment Plan

DIRECT BILL 20% DOWN 5 PAY - 5 INSTALLMENT(S) ▼





Bind Policy

There will now be a drop down box on the bottom middle of the screen. Chose whether the Insured wants to be charged by Direct Bill, or pay by a Recurring Draft. If the Insured decides they want to Pay in Full at this point, you will need to rework the policy and click the Pay in Full discount so it can be calculated into the premium (if Pay in Full was checked previously, this will be your only option). Click Bind Policy.

Binding the Policy

[← Cancel Payment](#)

Pay with Credit / Debit card Bank Account

Card Number    

Expiration Security code (?):

Card Holder

Address

[Store Payment Information](#)

On the next screen, you will be asked to input card information for those who chose Recurring Draft. Fill this out as you normally would and click Store Payment Information. If Direct Billing or Pay in Full was chosen, this will be skipped.

Make a Payment ✖

Q00000016 · Pending
08/16/2022 - 02/16/2023
BRENDA SMITH - 123 TEST ST, AUBURN AL 36830

Click a payment amount or enter a different amount below.

Payment Method:

Payment Amount: \$ 201.20

Previous	Current	Future	TOTAL
\$0.00	\$198.20	\$0.00	\$198.20

* Applicable fees being charged:
Electronic Payment Fee: \$3.00

[Next »](#)

Now you will get the down payment screen. Choose the method in the drop down box; you may chose card or agency sweep. If card is chosen, there will be another payment window to fill out. Add any Agency fees you may have. Click Next.

Sign Pre-Bind Documents

Both you and the policy holder will need to sign these documents.

- Use in-office E-Signature and have the Policy Holder complete the process now
- Use remote E-Signature and email the Policy Holder to complete the process at their convenience





[Next →](#)

Choose how the insured wants to sign the documents. A drop down will appear for either option. Make sure the email addresses are correct and hit Next.


Policy Q00000016 has documents requiring your signature

Hello **INSURE SCAN**,

Your signature is requested on the following documents:

-  ALABAMA APPLICATION
-  NON_BUSINESS USE STATEMENT
-  MEDICAL PAYMENTS SELECTION/REJECTION
-  ALABAMA UNINSURED MOTORIST COVERAGE SELECTION/REJECTION

Please review the included documents and sign where requested.

 By choosing "Continue to signing" or "Decline to sign documents" I certify that I am **INSURE SCAN** and that I am the intended recipient of these documents.

Continue to signing

Decline to sign documents

A pop up will appear with documents needing e-signatures. The agent signs, then, depending on the method chosen, the Insured will sign in the popup, or through the link sent in an email. Once the signing is done, exit the popup screen. The page will reload.

INSURESCAN MGA, LLC

Application and Issuance
Document Printing

View the PDF Package

Contains all of your documents in one PDF package.



Please enable popups for this site!

Batch Print All Forms

Print All ID Cards

Continue

Adobe Reader

You will need Adobe Reader to view and print these forms.
[Click here to download latest version of ADOBE reader](#)



Now you will be able to see all of the documents that are associated with the policy, including the forms that were just signed as well as ID cards and Medical Statements. Print any or all forms as needed. Click Continue. The quote and bind process is now over, and the Insured's new policy breakdown is on the next screen.