

Underwriting Management System (UMS)

Please use the following steps to access your secure information in the PacificComp portal.

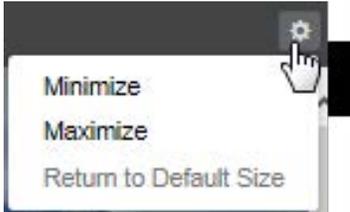
1. Visit www.copperpoint.com, click **LOGIN** and select PacificComp
2. Click **MY PORTALS** and select PacificComp
3. Click on **Manage Submissions**

Questions about logging into your account?

Contact portaladmin@copperpoint.com or call 818.575.8500

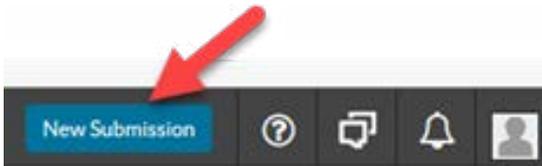
ARRANGING THE LOOK OF YOUR HOME SCREEN

The information boxes (Submissions and Recent Activity) can be dragged and dropped anywhere on your screen. To minimize a box, select the icon in the top righthand corner of each box:



CREATING A NEW SUBMISSION (UPLOAD YOUR ACORD APPLICATION TO UMS)

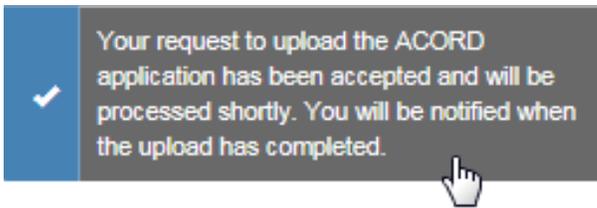
From your Home screen, click on the **New Submission** button in the top right corner.



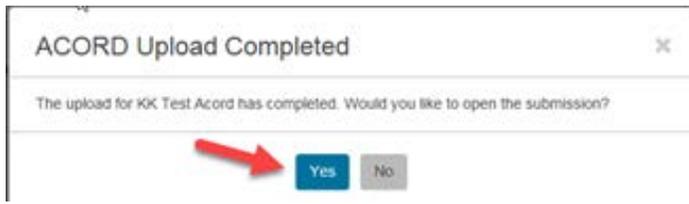
In the **Submission Details** box:

- Select **Upload from an ACORD application**.
- Select **Select File to Upload**. Search for your saved ACORD/document on your desktop or other file on your computer.
- Supply **Needed by Date** (optional).

- Select the **Create Application** button once. There may be a slight delay. Please wait for the pop-up that will appear, advising that the ACORD is being loaded. You will be notified when the upload has been completed.



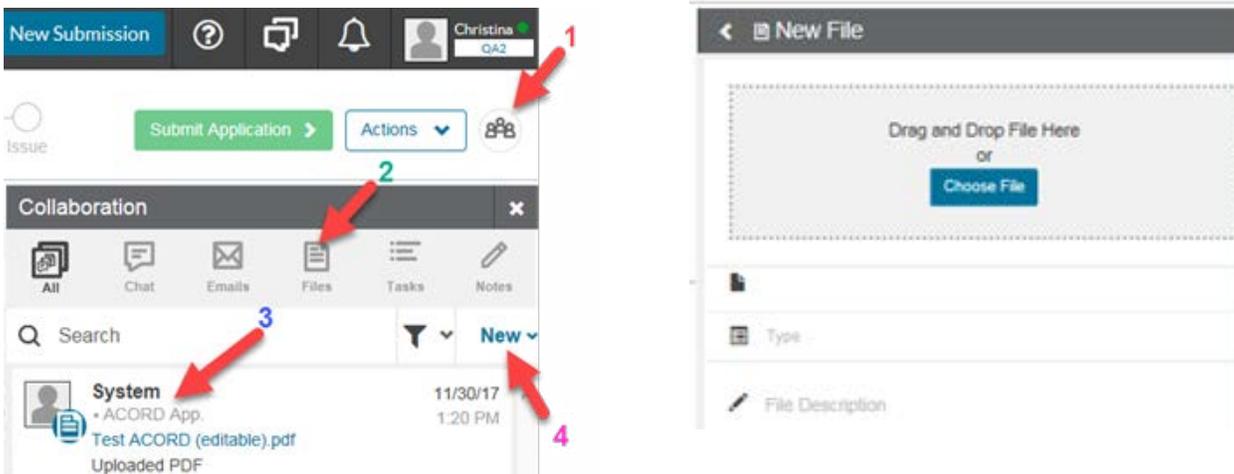
- Once the ACORD upload is completed, select **Yes** to open the submission.



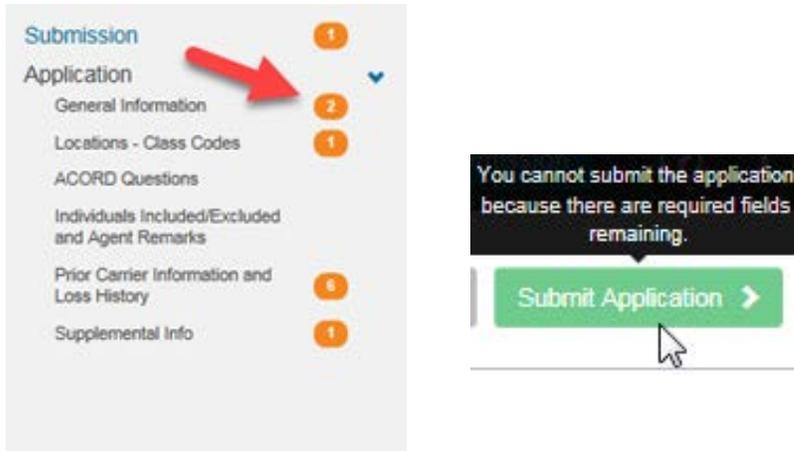
The UMS system will self-populate with information from the ACORD and will automatically attach the ACORD to the submission under "Files." To access the Files folder:

1. Select the round **Collaboration*** icon in the top right corner of the screen.
2. Select the **Files** icon.
3. Click on the ACORD attachment to open the document.
4. To attach additional documentation, select **New** and either drag and drop the file to the space indicated or select **Choose File** to attach a document saved to your desktop or another file location.

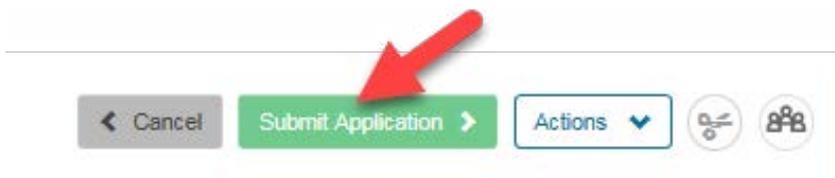
*Note: The **Collaboration** icon also contains the **Chat, Emails, Tasks and Notes** functions.



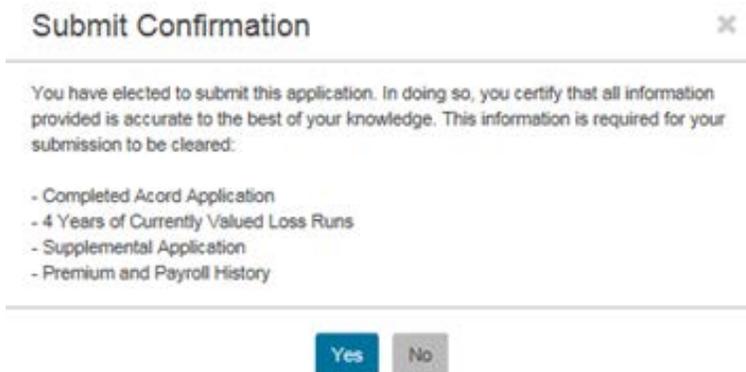
Once the ACORD upload is complete, it will bring you to the **Submission** screen to complete the required fields in each section. Missing information is indicated by a **red asterisk ***. Review and confirm all information is correct.



After all fields are satisfied, click on the **Submit Application** button in the top right corner of your screen to formally submit your application and put it into our queue. Your application is not submitted until you click on the **Submit Application** button.



In the **Submit Confirmation** pop-up, select **Yes** to formally submit your application. UMS will automatically evaluate for our **SmallComp Program**. If it is not eligible for the program, the submission will be sent to an Underwriter for evaluation.

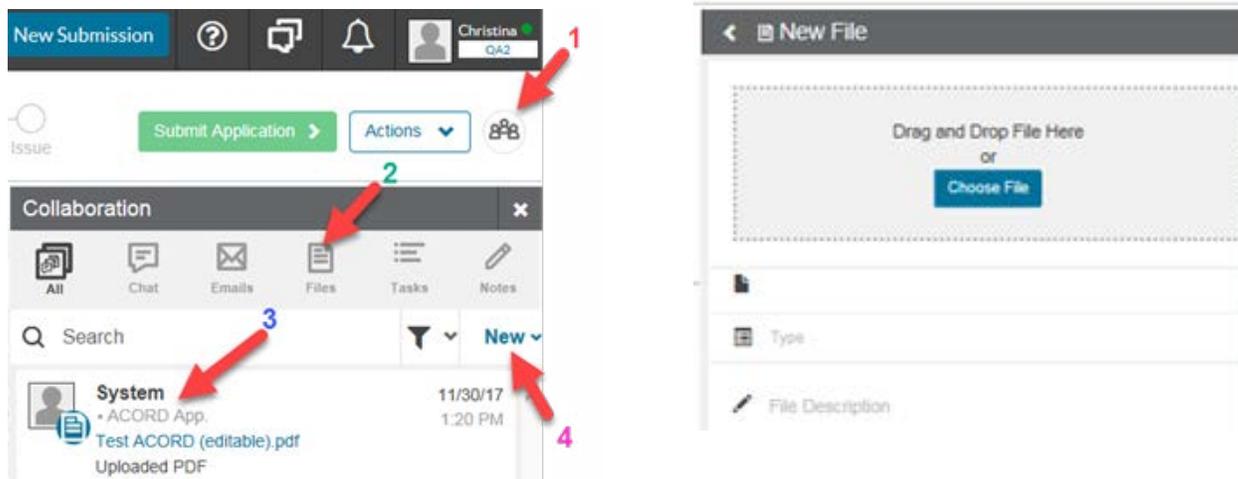


ATTACHING ADDITIONAL DOCUMENTS TO THE SUBMISSION

Attach documents such as ACORD, loss runs, narratives, experience modification worksheets, etc. to the submission as required.

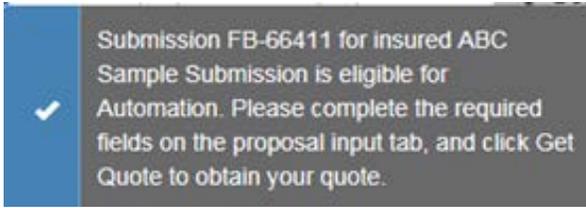
1. Select the round **Collaboration*** icon in the top right corner of the screen.
2. Select the **Files** icon.
3. Click on the ACORD attachment to open the document.
4. To attach additional documentation, select **New** and either drag and drop the file to the space indicated or select **Choose File** to attach a document saved to your desktop or another file location.

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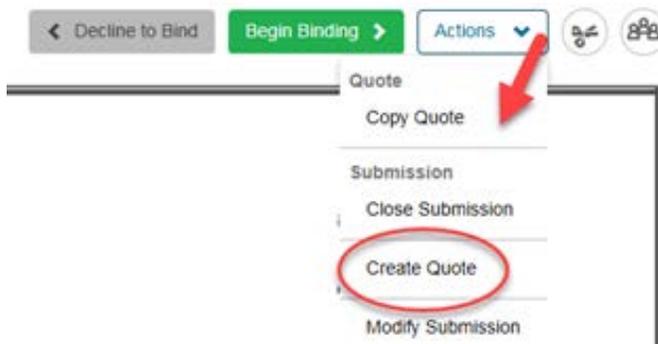
GENERATING A SMALLCOMP QUOTE FOR ELIGIBLE SUBMISSIONS

If a submission qualifies for **Small Comp** online quoting, the following message will appear:

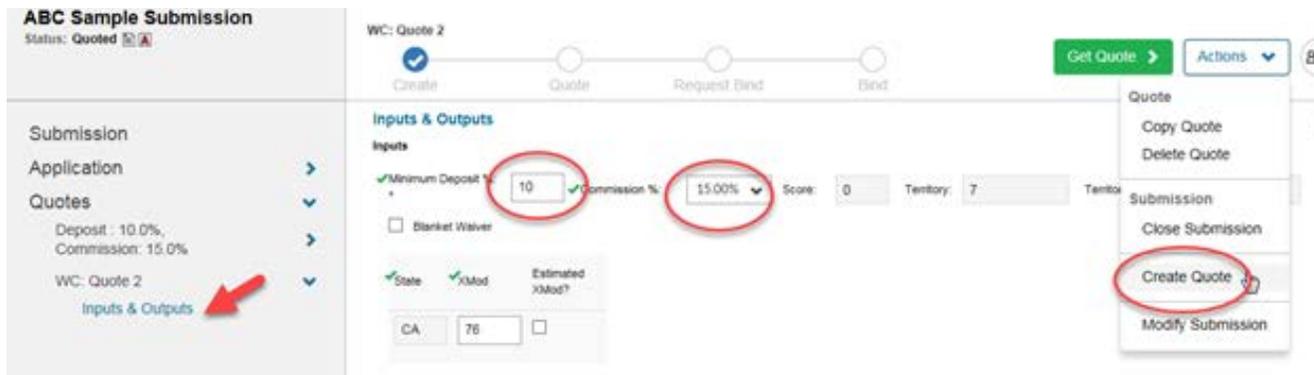


You will be taken to the proposals page and given the option to create one or more quotes at various deposit and commission levels using the **Actions** tab*.

*NOTE: The system will automatically generate an initial quote with a 10% deposit/15% commission. To generate a quote with alternate percentages, see the next step. **Commission levels can be adjusted from 0-20%.**

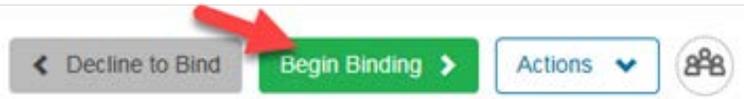


Under the **Create Quote** tab, you have the option of adjusting deposit and commission % levels. Select **Get Quote** when the desired information has been inputted.



BINDING PROCESS

Click on the quote you'd like to bind and select the **Begin Binding** tab.



Complete the additional needed information as indicated by the red asterisk *. Click on **Request to Bind**.

Deposit : 10.0%, Commission: 15.0%

Quote > Request Bind > Bind

Decline to Bind Request to Bind Actions

Bind Input Please complete 4 fields *

The following fields are required in order to complete your request to bind coverage. If already entered, please validate.

- *Please certify that you have attached three years of currently valued loss runs. Yes
- *Please confirm you have attached the ACORD application. Yes

	Name	Phone	Ext.	Cell Phone	Email	
✓ Inspection:	Insp	310-822-661*				
✓ Accounting:	Acct	310-822-661*				<input type="checkbox"/> Same as Inspection Cont
✓ Claims:	Claims					<input type="checkbox"/> Same as Inspection Cont

Partners, Officers, Relatives to be Included or Excluded. (Remuneration to be included must be part of payroll section.)

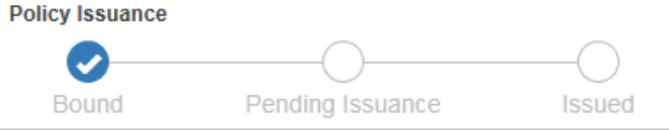
#	Name	Date of Birth	Ownership %	Title	Duties	Incl./Excl.	State Code Val.	Remune
1	John Doe		50%	President	Mat	Exclude	Select a...	
2	Jane Doe		50%	Secretary	Mat	Exclude	Select a...	

Please confirm or complete the following Billing Plan information in the Application tab, Supplemental Info form:

- Direct Bill Agency/Broker Bill
- *Payment Plan: Please Choose
- *Audit: Please Choose

The following message will appear, confirming the bind and providing a Claims Toll-Free reporting number. The Policy Number can be found on the left side bar on the Submission page.

✓ You should receive your policy within 30 days. In the meantime, if the insured should have a claim, please instruct them to call our Claims Toll-free Reporting number at 1-800-474-8080. Thanks again for the order to bind. We greatly appreciate your business.



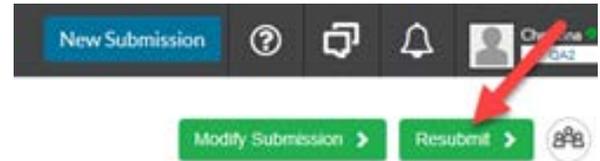
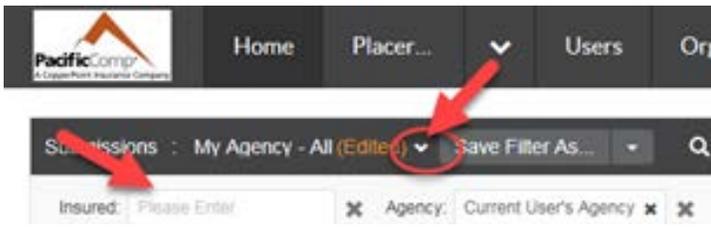
Submission

- Application >
- Quotes >
- WA 00623400 (WC) ✓
- Policy Issuance** ✓
- Inputs & Outputs
- Bind Input

RESUBMIT FUNCTION

The Resubmit function allows you to create a copy of a previously declined or lost submission **within 90 days** of a policy's expiration date. If the expiration date is **within 90 days** of the current date, the Resubmit button, found at the top right corner of your screen, will be active.

Find the original submission by selecting **My Agency – All** in the drop-down box (top left corner of your screen) and searching for the insured's name. Click on the submission to open it, then select the **Resubmit** button in the top right corner.



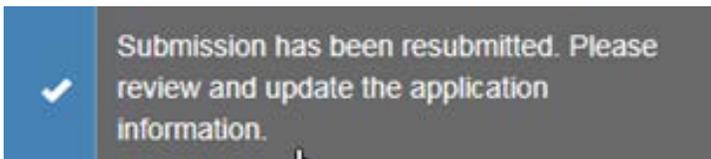
Verify that you want to resubmit by selecting **Yes** in the pop-up.

Resubmit Submission

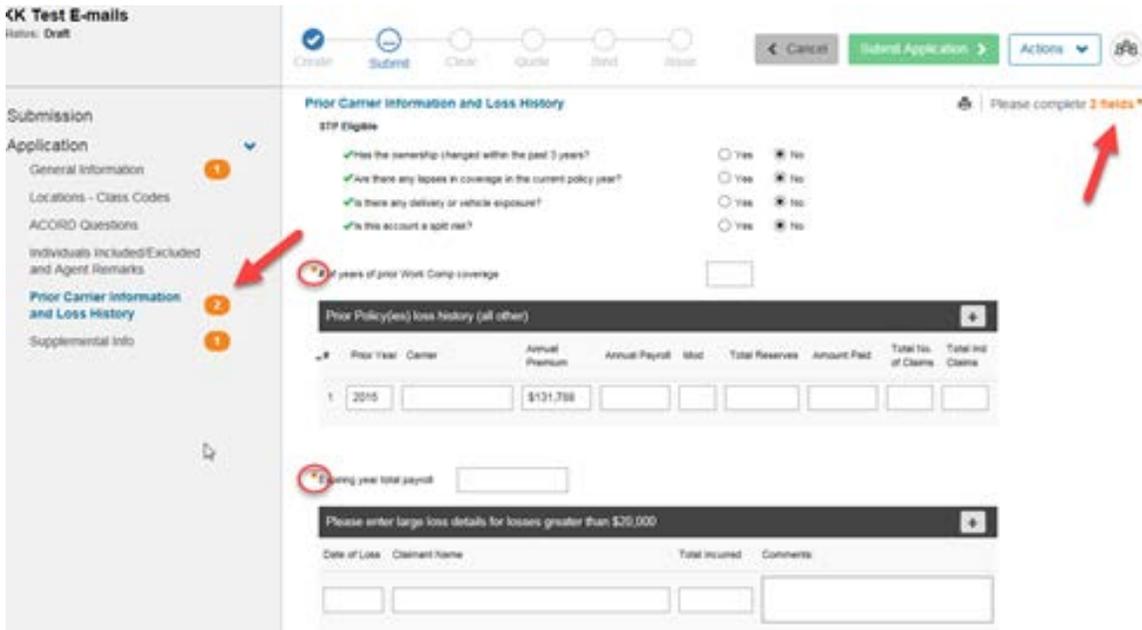
Are you sure you want to resubmit this submission?



The following message will appear. UMS will produce a copy of the submission in “Draft” status (not formally submitted yet). A pop-up will advise when the process is complete.



From this point, the submission should be reviewed and updated as necessary under the **Application** tab. The system will notify you of missing information with **red asterisks**.



Submission Status: Draft

Application Tab: **Submit Application** (highlighted in green)

Please complete 3 fields*

Prior Carrier Information and Loss History

STP Eligible

- Has the ownership changed within the past 3 years? Yes No
- Are there any lapses in coverage in the current policy year? Yes No
- Is there any delivery or vehicle exposure? Yes No
- Is this account a split rate? Yes No

Number of years of prior Work Comp coverage:

Prior Policy(ies) loss history (all other)

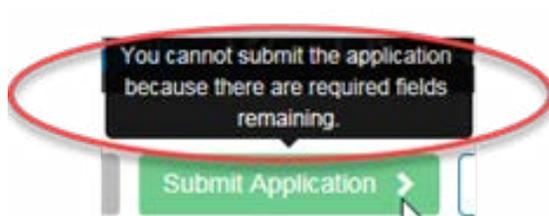
#	Prior Year	Carrier	Annual Premium	Annual Payroll	Ind	Total Reserves	Amount Paid	Total No. of Claims	Total Ind. Claims
1	2015		\$131,788						

Current year total payroll:

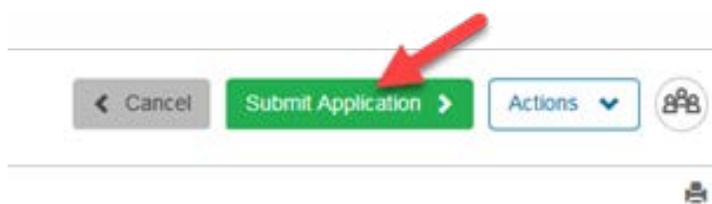
Please enter large loss details for losses greater than \$20,000

Date of Loss	Claimant Name	Total Incurred	Comments
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

If there is missing information, the system will prevent you from submitting.



When all information has been entered and verified, select the **Submit Application** button in the top right corner of your screen.



Verify that you want to resubmit by selecting **Yes** in the pop-up.

Submit Confirmation

You have elected to submit this application. In doing so, you certify that all information provided is accurate to the best of your knowledge. This information is required for your submission to be cleared:

- Completed Acord Application
- 4 Years of Currently Valued Loss Runs
- Supplemental Application
- Premium and Payroll History

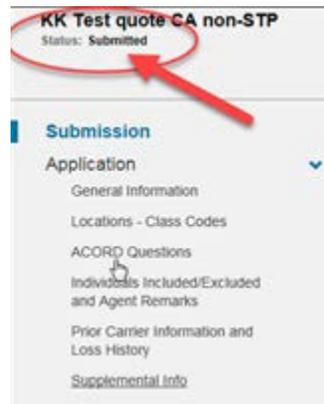


Remember: The new submission is in “DRAFT” status to allow any changes that are needed. The user must select the Submit Application tab to formally submit the account and put it into our queue.

Submit Confirmation

You have elected to submit this application. In doing so, you certify that all information provided is accurate to the best of your knowledge. This information is required for your submission to be cleared.

- Completed Acord Application
- 4 Years of Currently Valued Loss Runs
- Supplemental Application
- Premium and Payroll History



The system will indicate whether the submission qualifies for our automated **Straight-Through Processing Program**.

 Thank you for submitting your application. The account is not eligible for straight-through-processing and will be referred to an Underwriter for review, due to the following reasons: — Class code is not STP Eligible. — Gross premium is greater than \$50,000 in premium.

 Submission FB-67618 for insured Clearance IV is eligible for Automation. Please complete the required fields on the proposal input tab, and click Get Quote to obtain your quote.

Questions about logging into your account?

Contact portaladmin@copperpoint.com or call 818.575.8500