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: Coverage changes can be processed by the agent via the $*Endorsements* button at the bottom of the policy history page. For endorsement requests that must be submitted to Underwriting, please forward requests to endorsements@westpointuw.com or fax to 727.507.7596. You can also use the document upload feature to upload photos, policy change requests, cancellation request, etc. directly to policy history.

CAN'T FIND A PARK OR SUBDIVISION? Simply input the first few letters of the park name and a list will be populated for you. Double click the correct park to begin your quote.

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.

SPECIAL FORMS: All policy forms and endorsements are available under the *special forms* menu at the website.

ITEMS REQUIRED TO BE SENT TO US? Generally, the only thing we require the agent to send in after binding 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. Agent audits will be conducted electronically on an annual basis.

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 checking account information. Credit cards are only accepted via the Customer Portal and require the insured to register.

AGENT DASHBOARD: All of your policy transaction information is available via agent dashboard utility. You can export a list of policies directly from the agent dashboard in excel format.

NIGHTLY OUTPUT ALERTS: Please be advised that the no documentation is physically mailed to the agent. All nightly policy transaction information is emailed to the agency contact on file.