



Trexis.com User Guide

To log into www.trexis.com, enter a valid login and password now. If you do not remember the login &/or password, contact **Tech Support**, (877) 888-1712, 8 a.m. to 5 p.m. CST Monday-Friday for assistance.

Contents

Program Descriptions	2
Quoting	2
Effective Date	3
SR-22/FR-44.....	3
Violations	4
Vehicles	4
Proof of Prior.....	4
Quote Summary	5
Pay plan options.....	5
Search for an Existing Quote	6
Payment Due Dates on Quotes and Applications.....	6
Application	8
MVR.....	8
Bind and Pay	8
E-SIGNATURE.....	10
Document Upload	12
At New Business	12
For Existing Business.....	13
Document Upload Log.....	14
CONSUMER REPORTS	15
PAPERLESS DISCOUNT.....	16
Endorsement.....	18
Endorse Driver or Vehicle Information.....	18
Rewrite/Reinstate a Policy.....	19
Website Cancellations.....	19
ADDITIONAL INFORMATION	20

Program Descriptions

Trexis is a non-standard auto program that is not insurance scored, best selected for inexperienced drivers and those with less than average credit.

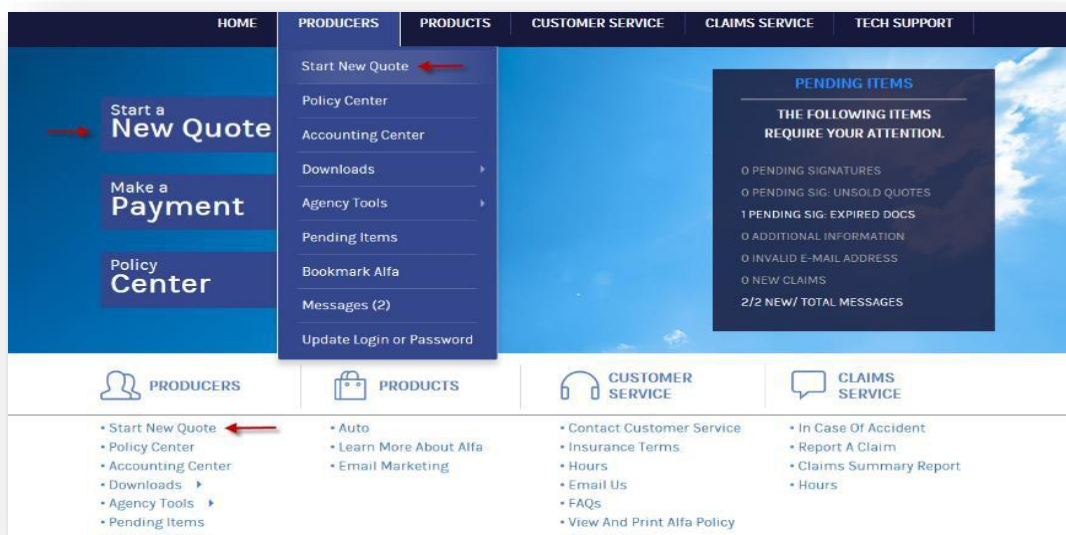
Trexis One is a mid-market auto program using insurance scoring as rating criteria. Lower rates are offered for customers with average to better credit.

Both programs offer better rates for multi-car, transfer, and full coverage business and will reward drivers more likely to renew.

Quoting

Click on **“Start New Quote”** from a location on the home page. In other sections of the website “Start New Quote” can be accessed from the blue tool bar at the top of the page under PRODUCERS.

If the initial quote screen does not appear when you click on “Start New Quote”, the Pop-up Blocker may need to be disabled on the computer. If assistance is needed, please contact our Tech Support Department at (877) 888-1712.



When quoting in Trexis if selecting to rate the quote with an insurance score using Trexis One please be aware that once an insurance score is obtained the non-scored Trexis program will not be available for this quote. You will not be able to go back into the Trexis quote and will need to re-enter the quote in Trexis.

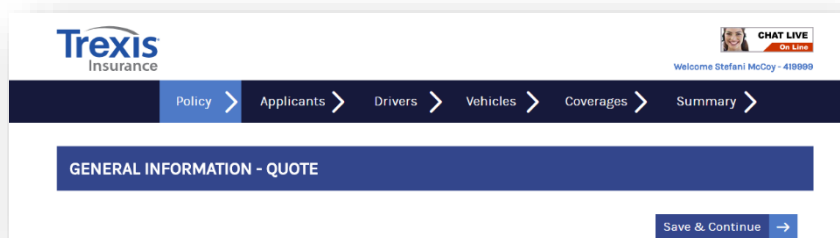
Once coverages are selected and the **Save & Rate** button has been clicked, Trexis will begin rating the policy but Trexis One will require that you accept the Federal Fair Credit Reporting Act before proceeding.

Effective Date

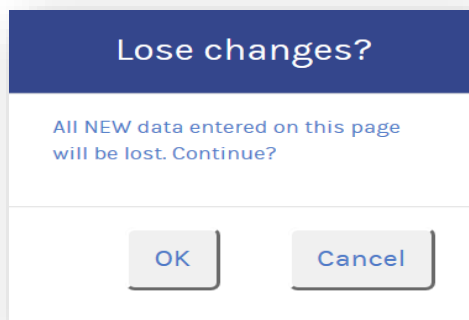
60 days in the future will be accepted in the Effective Date field. **Advanced Quote discounts apply in most states** when a quote is initiated at least 7 days but not more than 60 days prior to the policy effective date. The named insured must be 19 years old or older to qualify.

There are two ways to navigate through the quote/app screens. You can click on the button on each screen or you can click on the tabs across the top of the screens.

Save & Continue →



When moving through the screens by clicking on the tabs, any information completed on the screens will be saved if proceeding forward through the tabs. If attempting to move back to previous screens prior to saving, the following message will appear:



SR-22/FR-44

In some states, this option is not available and an error message will automatically appear. In this instance the SR-22/FR-44 request must be removed before proceeding.

You may not add an SR22/FR44 with an out of state license!

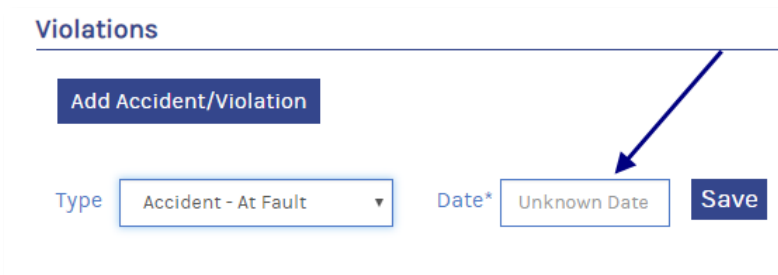
In states where these forms can be filed, if the State field does not automatically populate, use the drop-down box to view a list of states where SR-22s are available. FR-44s are only available in Virginia, SR-50s are only available in Indiana.



Violations

Violations should be entered to receive an accurate quote. Click on “Add” next to the Violations field. Select from the list of choices provided. Click on “Add” to include each additional violation. NOTE: MVR is run at Point of Sale. Use unknown date when prospect is not sure of exact violation date.

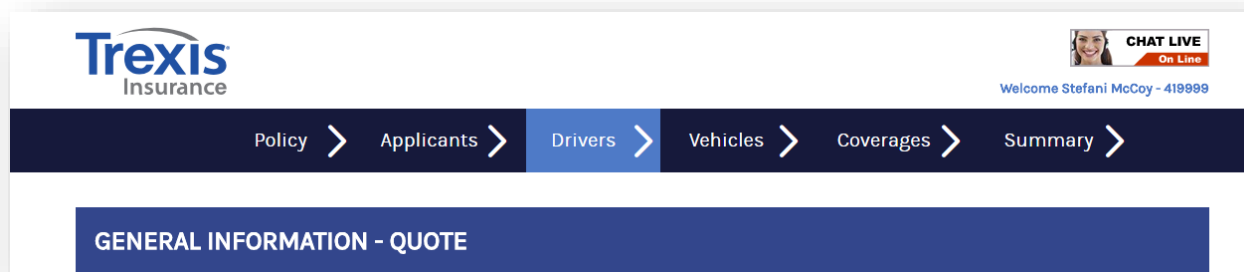
- ✓ Violations entered during the quote process may be deleted or edited before binding the endorsement.
- ✓ Violations returned through the MVR may not be deleted or edited.



Violations

[Add Accident/Violation](#)

Type Date* [Save](#)



Trexis Insurance

[CHAT LIVE](#)
On Line

Welcome Stefani McCoy - 419999

[Policy](#) > [Applicants](#) > [Drivers](#) > [Vehicles](#) > [Coverages](#) > [Summary](#) >

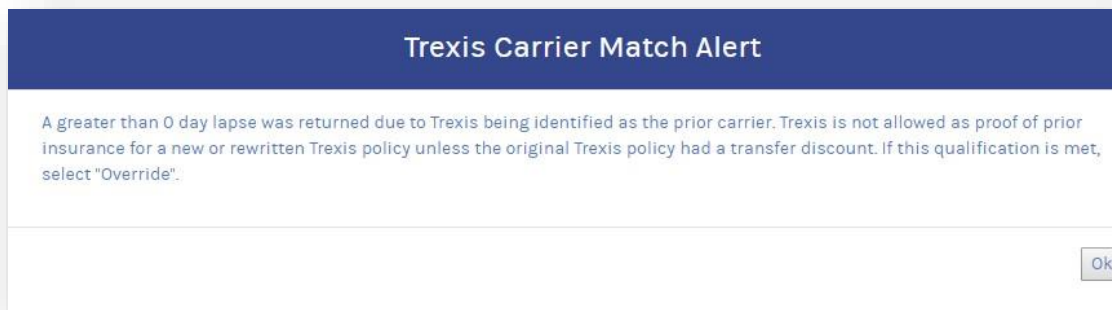
GENERAL INFORMATION - QUOTE

Vehicles

Some older vehicles may not be listed. If the model cannot be found, click on Model not found. This will allow the year, make and model of the vehicle to be entered manually. If the vehicle model is not found, or an error message is displayed, call Tech Support (877) 888-1712.

Proof of Prior

By opting to **override** the information from the **Consumer Report**, the applicant will be required to submit proof of prior insurance. If we do not receive proof within 30 days of the effective date, the discount will be removed and policy up-rated. Document Upload is the best way to submit proof of prior. See section on document upload for detailed instructions.



The following is an example of a proof of prior discrepancy:

The screenshot shows the Trexis Insurance website interface. At the top left is the Trexis Insurance logo. At the top right is a "CHAT LIVE" button with a "On Line" indicator and the text "Welcome Tennessee QA - 419999". Below the header is a dark blue navigation bar with white text and right-pointing chevrons for "Policy", "Applicants", "Drivers", "Vehicles", "Coverages", and "Summary". The main content area has a "MESSAGE" section. The message text reads: "Agency Input does not match Consumer Report. The prior information collected on the Applicant Screen differs from the Consumer Report information from our vendor. If you choose 'No Thanks', the rating of the policy will stop. If you are certain that the prior insurance data found by our vendor is incorrect, choose the button 'OVERRIDE Consumer Report and Use Agency Information' and send in acceptable proof of prior insurance. The policy will be rated based on the information entered by the agency. Acceptable proof of prior insurance must be received within 30 days of the effective date or the prior insurance information will revert back to the consumer report data and the policy premium will be adjusted back to inception to reflect the new information." Below the message are two links: "Prior Insurance Entered By the Agency" and "Prior Insurance from the Consumer Report". Under the first link, there is a "Policy Expiration" label and a dropdown menu showing "1-15 Day Lapse". At the bottom are two blue buttons: "OVERRIDE Consumer Report and Use Agency Information" and "No Thanks".

Quote Summary

If you determine that something needs to be changed on the policy, click on the appropriate section tab to be returned to that section of the quote.

Pay plan options

The premium, installment payment, and the date of first payment may vary due to pay plan selected. Once a pay plan is selected a more detailed quote summary will be shown.

Search for an Existing Quote

To search for an existing quote, look up by First or Last Name and Search status (Quote). A date range can be entered to narrow the search.

There is another “Start New Quote” button on this page.

Policy Data Last Updated On: 03/28/2018 3:14:48 AM

Please click the SEARCH button to perform a new search...

This is a  **HELP button**. Click on it anywhere you find it for a more detailed explanation of the area you are in.

Payment Due Dates on Quotes and Applications

Available payment plans will be shown on the quote and application summary along with the first payment due date. This provides more information while selecting the installment payment option that best fits your customer's needs.

The premium shown on the quote and application reflects the “last pay plan selected” for previously completed quotes. Confirmation of the last plan selected is shown at the beginning of this section. We offer alternative plans below the initial selection and the selection can be changed any time prior to binding:

Total premium and payment dates can vary depending on the payment plan selected.

The payment schedule shown at the bottom of the quote/application summary will be representative of the plan selected.

Please select a Pay Plan below to view coverages and print the summary in English or view and print in Spanish.

John Doe Insurance
123 Street
Franklin, TN 37064NAMED INSURED
1234 STREET
FRANKLIN, TN 37064Underwritten By:
Trexis Insurance
Corporation
December 29, 2022

Auto Insurance Quote Summary

Thank you for contacting our agency about your auto insurance policy. We have provided you with a quote from Trexis Insurance Corporation. Trexis is well known for competitive rates, quality Customer Service and fast and efficient Claims Service.

These rates are subject to verification of information. If you have any questions or would like to purchase this Trexis policy, please call me at 615-661-0700.

LAST PAYMENT PLAN SELECTED

Please select a Payment Plan below to view payment amounts.

Please note: Taxes and/or
Fees are not included in
Total Premium.

AVAILABLE PAYMENT PLANS

Paid In Full

The Total Premium listed for the Paid in Full plan includes all applicable fees.

Plan	Total Premium	Down Payment	Installments	First Payment Due
Paid in Full	\$481.00	\$481.00	N/A	N/A

EFT (Electronic Funds Transfer)

Assists in managing your budget and saves you money each month. Installment payments include installment fees. Choosing a different payment plan than the last selected will update the payment schedule below.

Plan	Total Premium	Down Payment	Installments	First Payment Due
11.00% Down - 11 Pay - EFT	\$642.00	\$72.27	11 installments of \$59.15	1/29/2023
12.50% Down - 11 Pay - EFT	\$642.00	\$82.13	11 installments of \$58.26	1/29/2023
16.67% Down - 11 Pay - EFT	\$642.00	\$109.52	11 installments of \$55.77	1/29/2023

RCC (Recurring Credit or Debit)

Assists in managing your budget and saves you money each month. Installment payments include installment fees. Choosing a different payment plan than the last selected will update the payment schedule below.

Plan	Total Premium	Down Payment	Installments	First Payment Due
11.00% Down - 11 Pay - RCC	\$642.00	\$72.27	11 installments of \$59.15	1/29/2023
12.50% Down - 11 Pay - RCC	\$642.00	\$82.13	11 installments of \$58.26	1/29/2023
16.67% Down - 11 Pay - RCC	\$642.00	\$109.52	11 installments of \$55.77	1/29/2023

Direct Bill

Installment payments include installment fees. Choosing a different payment plan than the last selected will update the payment schedule below.

Plan	Total Premium	Down Payment	Installments	First Payment Due
Premium Finance	\$622.00	\$637.00	0 installments of \$0.00	N/A
11.00% Down - 11 Pay	\$683.00	\$76.78	11 installments of \$66.47	1/29/2023
12.50% Down - 11 Pay	\$593.00	\$76.01	11 installments of \$58.36	1/29/2023
16.67% Down - 11 Pay	\$593.00	\$101.35	11 installments of \$56.06	1/29/2023
25.00% Down - 3 Pay	\$593.00	\$152.00	3 installments of \$162.00	3/29/2023

POLICY TERM

12 Month Term

DRIVERS AND HOUSEHOLD RESIDENTS

The applicant, spouse and all household residents 15 years of age or older, all regular operators of the vehicles described in this application, and all children who live away from home who drive these vehicles, even occasionally are listed below.

Name	Age	Sex	Marital Status	Relationship	Driver Status
NAMED INSURED	43	F	Single	Named Insured	Principal

DRIVER VIOLATIONS

Driver Name	Description	Date	Points
-------------	-------------	------	--------

No prior insurance selected.

Application

Quotes are automatically saved and **can be retrieved for the next 60 days** from the Policy Center.

[Continue to Application](#) →

Make necessary changes and updates for the application, driver, or vehicles.

Add lienholder in Vehicle screen if one is required. When typing in the field provided, choices of known lien holders will appear. If at all possible, select the exact provider and location. If the provider does not appear, click on **Not in list** to enter the information manually.

Underwriting questions: A short questionnaire must be completed. If an answer requires explanation, space will be provided. All questions should be posed to and answered by the applicant.

*ALL household residents 14 years of age or older, all regular operators of the vehicles described in this application, and all children who live away from home who drive these vehicles, even occasionally, must be disclosed and **either rated or excluded**.*

It will be necessary to accept the terms of the [Federal Fair Credit Reporting Act](#) Response in order to continue.

MVR

MVR is run after the Underwriting questions have been answered.

This alert advises that an MVR was not found on Driver 01. You may either select Edit Quote or Accept & Continue. Without a valid MVR, the policy rate is subject to change.

MESSAGE

No MVR for Driver 02 Incorrect License

This Motor Vehicle Record was not found or is not accessible at this time. The quote below does not reflect actual MVR data therefore the price quoted is subject to change. You may proceed with this quote as-is or you may change the data entered and try again. If you choose to proceed as-is, the actual price may change when the policy is underwritten and there may be a credit or a request for additional funds.

[Edit Quote](#) →

[Accept & Continue](#) →

Select [Print Unsold Quote](#) → (bottom of the page) to print the documents for the applicant's approval prior to binding coverage or you may send a copy electronically using the **E-signature process**.

Bind and Pay

When selecting Bind and Pay the user will be directed to the RTR Payment Screen. This screen offers pay options: Agency Account (Sweep), E-Check (insured Bank Account only), Credit Card. This screen also offers the user an option to Change Pay Plan and select if the down pay will be made with two payment sources.

RTR PAYMENT SCREEN

Once payment has been processed, you will be directed to generate application documents. Documents are generated in Adobe pdf format. If you do not have the reader installed on your computer, you can click here to download it.

Amount Due Today: \$141.44

Change Pay Plan 

Amount Paying Today: \$ 141.44

Do you want to split today's payment between 2 payment resources? No Yes

Select a payment type:

Agency Account e-Check Credit Card

Example of Split Pay option:

RTR PAYMENT SCREEN

Once payment has been processed, you will be directed to generate application documents. Documents are generated in Adobe pdf format. If you do not have the reader installed on your computer, you can click here to download it.

Amount Due Today: \$141.44

Change Pay Plan 

Amount Paying Today: \$ 141.44

Do you want to split today's payment between 2 payment resources? No Yes

Payment Option 1:

Select a payment type:

Agency Account Credit Card

Agency Account

Your Agency Trust Account will be debited for the amount selected below. Sufficient funds must be available to apply payment. Please enter the person who is submitting this payment below.

Amount:

\$

Applicant Name:
RTR TUTORIAL
Producer Code:
039999

Policy Number:
14-03-011815406
Submitted By:
Bw

Payment Option 2:

Credit Card

Amount:

\$

Card Holder Name (as it appears on card)*:

First Middle Last

Card Number*

****-****-****-****

Card Type*

Billing Zip Code*

CID*

i

Expiration Date*:

Month Year

Continue 

E-SIGNATURE

E-Signature details

Name*:

TEST TEST

Please enter the **Insured's email** and then re-enter again to confirm. This is the address that the email containing a link to the documents to be signed will be sent.

Email Address*:

Re-enter Email Address*:

Please enter a password, and then re-enter the password to confirm. This password will be used by the insured to retrieve the document.

Enter a Password*:

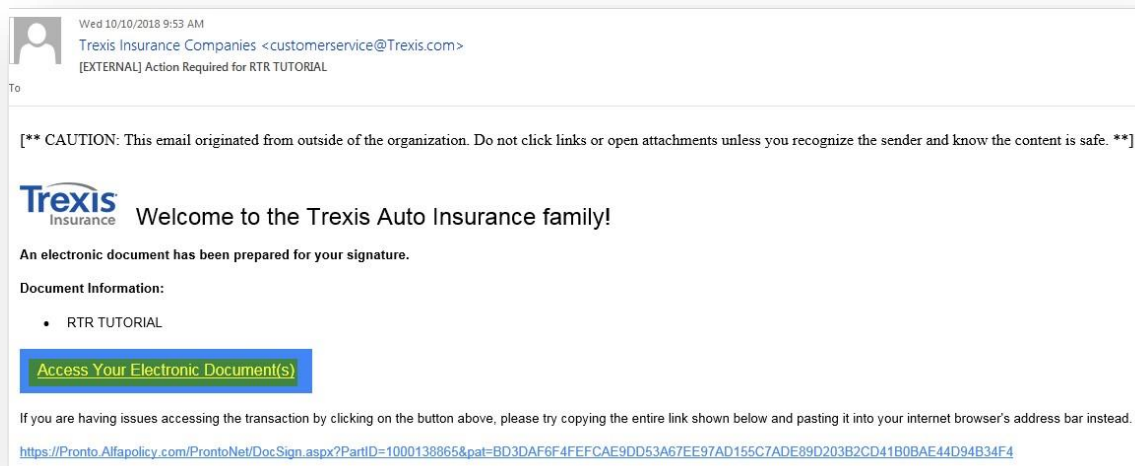
Re-enter Password*:

☐ I acknowledge the email address entered is the insured's email address.*



When using the E-Signature option the **e-signed documents can be retrieved from the Pending Items folder**. Notification is given for policies pending signature and those that have expired without signature. Insured must have a valid email address. **E-Signature applications require your acknowledgement the email address entered is a valid email address for the Named Insured.**

Policyholder will receive an e-mail requesting a signature.



When the policyholder opens the documents they will be prompted to enter their chosen password. They will have the option to agree to the Electronic Signature. A full summary of the application documents will be displayed for their approval. Each required signature area will be clearly marked.

Once all required signatures are completed, a copy of the document is available for download or view.

Success!

Thank you. You have successfully completed your document(s).

Please download a copy of your document(s) to your computer for safekeeping. Once you have downloaded your document(s) you may close this browser window.

Document	Status	Status Details	Options
 RTR TUTORIAL	Completed	This document is complete and contains all required tasks.	Download Open

If the e-signature process is not fully completed within 15 days of the policy effective date, the policy will be set up for cancellation.

The ability to resend the e-signature documents is available if needed through the Pending Items work area. If a wet signature is obtained prior to the cancel date, the application containing all required **wet signatures must be faxed or uploaded to us to avoid cancellation.**

Once the policy cancels for this reason, **it must be rewritten.** A policy that has cancelled for failure to return e-signed documents is no longer eligible for e-signature.

The application can be reprinted through the policy documents or the Accounting Center if the e-signature is not completed by the policyholder.

PAYMENT TRANSACTIONS

Payment Type

Web Upload Transaction Date

Search By

Policy #

All Website Payments

Payment Search Results

Agency account uploads will be processed through your financial institution within 48-72 business hours of the upload date.

Fax Premium transmittals faxed to 877-747-4667 will be processed within 24 business hours of receipt.

Total Amount Paid for this search = \$141.44 (all pages)

Print All Records

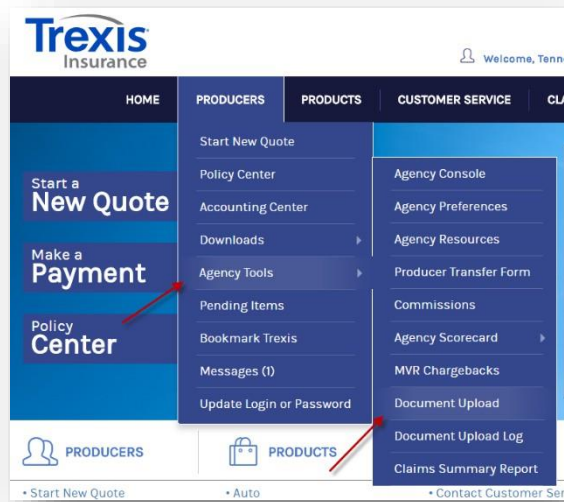

Export To Excel


Export To CSV

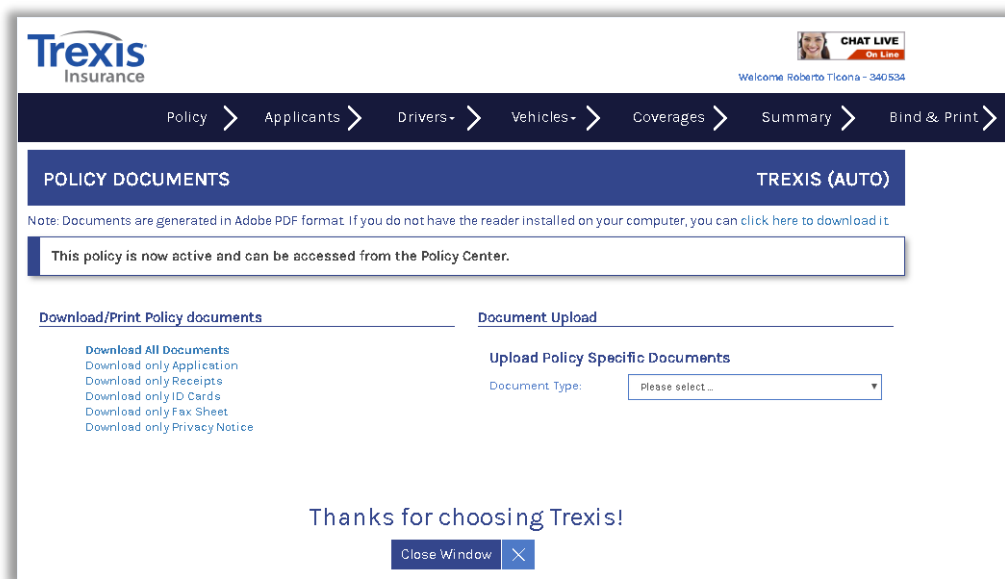

Page 1 of 1

Policy Number	Insured Name	Date & Time	Submitted By	Amount	Cancel Payment	Action
14-03-011815406	TUTORIAL, RTR	10/10/2018 9:52:10 AM	BW	\$141.44		Reprint App

Document Upload



At New Business



At upload of new business, any other policy related documents such as proof of prior insurance may be uploaded before exiting the Bind & Print screen.

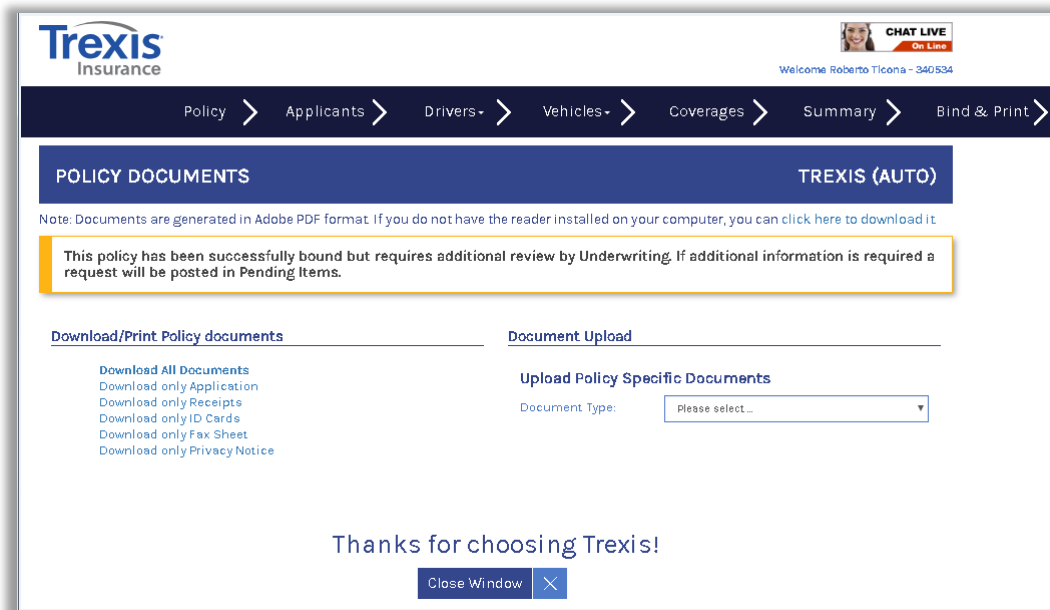
1. Immediately after payment is made, the option to Upload Policy Related Documents is available. Select the type of document from the list provided.
2. After selecting document type, click Choose File:
3. Select a document file type (example: PDF, jpeg, or docx).
4. Each file is assigned a file number and uploaded into the Document Upload Log.
5. This provides immediate proof the document has been received.

Policyholder Registration

- All auto activated policies will be immediately available for policyholder registration on **www.Trexis.com**
- Policies that are auto activated will display the following message just after being issued: ***This policy is now active and can be accessed from the Policy Center***
- Click on the Policyholders Register Here link (see below) and follow the steps to register
- Once registered the client can make a payment online, obtain ID cards, view policy, billing, payment and claims information



A screenshot of a 'USER LOGIN' form. At the top, it says 'Please enter your Login Name and Password below'. There are two input fields: 'Login Name' with a person icon and 'Password' with a key icon. Below the password field, a red asterisk note states '*Passwords are case sensitive'. At the bottom left is a 'Forgot Password?' link. At the bottom center is a blue 'SUBMIT' button with a right arrow icon. At the bottom right is a red arrow pointing to the text 'Policyholders Register Here'.



A screenshot of the Trexis Insurance website's 'POLICY DOCUMENTS' section for a 'TREXIS (AUTO)' policy. The header includes the Trexis Insurance logo, a 'CHAT LIVE' button, and a welcome message for Roberto Ticona. A navigation bar contains links for Policy, Applicants, Drivers, Vehicles, Coverages, Summary, and Bind & Print. A note states that documents are generated in Adobe PDF format. A yellow box contains a message: 'This policy has been successfully bound but requires additional review by Underwriting. If additional information is required a request will be posted in Pending Items.' Below this, there are two sections: 'Download/Print Policy documents' with links for All Documents, Application, Receipts, ID Cards, Fax Sheet, and Privacy Notice; and 'Document Upload' with a section for 'Upload Policy Specific Documents' and a 'Document Type' dropdown menu. At the bottom, it says 'Thanks for choosing Trexis!' with a 'Close Window' button.

Note: If you see the message below, the policy has been bound. Policyholder Registration will then be available after the underwriting review has been completed and the policy has been activated.

For Existing Business

Proof of prior insurance or any other policy related document may be uploaded at any time.

1. This feature can be accessed from the Producers option on the tool bar, by selecting Agency Tools, then Document Upload.
2. Enter the policy number, select the type of document you wish to upload.
3. Select a document file type (example: PDF, jpeg, or other graphics file).
4. **OR** Within the policy by clicking on the Document Upload button
5. After selecting document type, click the Choose File button:

THIS POLICY IS SET UP FOR DIRECT BILL PAYMENTS			
Company	Alfa Vision Insurance Corporation	Agency Name	ALFA SPECIALTY INSURANCE CORP
Insured	123 SUNSHINE WAY	Agency	P O BOX 2324
Address	EVERYWHERE TN, 37013	Address	BRENTWOOD TN, 37024-2324
Insured Phone	(333) 333-3333	Agency Phone	(615) 661-0700

Each file is assigned a file number and uploaded into the Document Upload Log. This provides immediate proof the document has been received.

Document Upload Log

Access your Document Upload Log through the Producers tool bar at the top of the website, www.trexis.com, or at the bottom of the Home Page.

Trexis Insurance Welcome, Tenn

HOME PRODUCERS PRODUCTS CUSTOMER SERVICE

Start a New Quote

Make a Payment

Policy Center

Start New Quote

Policy Center

Accounting Center

Downloads

Agency Tools

Pending Items

Bookmark Trexis

Messages (1)

Update Login or Password

Agency Console

Agency Preferences

Agency Resources

Producer Transfer Form

Commissions

Agency Scorecard

MVR Chargebacks

Document Upload

Document Upload Log

Claims Summary Report

DOCUMENT UPLOAD LOG

Upload Date	Policy Number	File Name
06/24/2017	11-41-010	
06/13/2017	11-13-005	
01/15/2017	11-41-008	
01/12/2017	11-41-008	
07/19/2015	11-41-007	
07/01/2015	11-41-007649401	4-28-2014 10-57-42 AM.bmp
07/01/2015	11-41-007649393	4-28-2014 10-57-42 AM.bmp
06/28/2015	11-41-007633365	4-28-2014 10-57-42 AM.bmp
06/28/2015	11-41-007633344	4-28-2014 10-57-42 AM.bmp
03/09/2015	14-45-003555457	test.docx

Receipt can be confirmed by policy number, upload date and the file name assigned at time of upload.

CONSUMER REPORTS

All known household members and state registered vehicles will be retrieved based on the garaging address provided through available consumer reports. This is only available in KY, GA, VA, TX, SC, CO, NV, AL, AZ, & MS currently. The option to accept or reject each household member or vehicle listed and certain information such as names, date of birth, vehicle make and model, and VIN numbers will be entered into the appropriate screen automatically.

The garaging address is required during the quoting process. The address will be verified against consumer reports. **Please note: if the pre-fill window does not appear, no additional household member and vehicle information will be returned. This process only takes a few seconds to complete.**

“**Accept**” drivers that should be listed as Principal drivers on the policy. To designate a driver as a Non-Driver, select “**Household member**” from the drop-down box that will appear when “**Reject**” is selected. Anyone designated as a “Household member” will appear on the policy on a pre-filled screen.

Other listed individuals may be rejected because they are no longer in the household, are unknown, have never been in the household, or are the same as an individual you have listed on the application. One of the options listed must be used to reject an individual and only ones rejected as a “Household member” will be listed on the policy. It may be necessary to designate an individual as “**Duplicate**” if they are listed more than once or they are the driver designated as Named Insured.

The option to accept or reject each vehicle listed will be included in the Vehicle section. To complete this process, select “save and continue” as on the other quote screens. Verify that all information is correct for each driver and vehicle as some information may vary with that provided by the applicant.

PAPERLESS DISCOUNT

When customers choose electronic document delivery they will be eligible for the **Paperless Discount**.

When in the General Information screen, select the “electronic” option from the *Document Delivery Method*. It is mandatory that the applicant currently have and maintain a valid email address to be eligible for the electronic document delivery option. The policyholder will receive

an email within 24 hours after the quote is bound that will include a link to accept the **Paperless Terms & Conditions**. The discount will be removed if the terms are not accepted within 30 days. A section is added to the Paperless E-mail section in the Pending Items bin if any of these email addresses are invalid and need correction.

By clicking on the detail button, a list of invalid emails will be provided.

Once the correct email address is obtained, return to the pending items folder, click on Detail, and edit the email address. A new email to the policy holder will be generated and the pending item will be removed from the list. The terms must still be accepted within the original 30 day period to avoid removal of the paperless discount. Agents and policy holders will still have the option of printing policy documents from our website as needed. **Paperless can be added mid-term and the discount will be pro-rated.**

Printer Friendly View

PENDING ITEMS - POLICIES NEED SERVICE

To view items that require your attention, select a category

E-Signature Manager		# Outstanding
Electronic Signature - Pending Signature	0	Detail
Electronic Signature - Pending Signature Unsold Quote	0	Detail
Electronic Signature - Expired Documents	0	Detail

PLEASE NOTE: IF THE APPLICANT STATES THAT THEY HAVE NOT RECEIVED THEIR E-SIGNATURE EMAIL NOTIFICATION, AN INVALID EMAIL ADDRESS MAY HAVE BEEN ENTERED. PLEASE CLICK ON "Detail" AND SELECT "Edit" FOR THE APPROPRIATE APPLICANT AND RE-ENTER THE CORRECT EMAIL ADDRESS. YOU CAN THEN SELECT "Re-Notify" TO RESEND THE E-SIGNATURE NOTIFICATION EMAIL TO THE APPLICANT

Additional Information		# Outstanding
Additional Information	0	Detail

Paperless E-mail Non-Deliverables		# Outstanding
The policies listed require e-mail address correction to avoid loss of paperless discount		0 Detail

Claims		# Outstanding
Newly Assigned Claims	0	Detail

Messaging Manager		# New/Total
Agency Messages	2/2	Detail

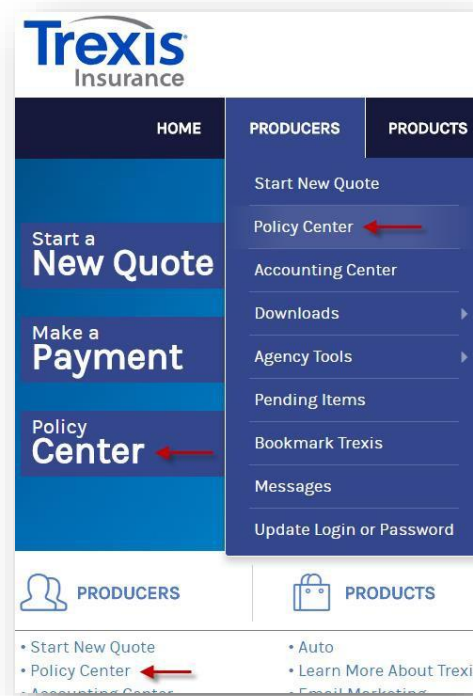
Endorsement

The **POLICY CENTER** can be accessed from three areas of the home page:

If the policy is not eligible to be endorsed, reinstated, or for a rewrite, the icons will not be visible or are grayed out. **Contact our Customer Service Department at (877) 384-7466** for questions about these policies. Grayed-out (protected) fields may not be endorsed on-line. These **changes must be faxed to Customer Service at (877) 684-7466**.

You may endorse up to seven days in the past or thirty days in the future.

The driver screen will default to the Named Insured. To access a driver listed on the policy, hover the mouse over the Drivers Tab and all listed individuals will appear. Click on the one needed to view/endorse.



Endorse Driver or Vehicle Information

Drivers and Vehicles listed on the policy can be selected by hovering with the mouse over the App, then selecting the appropriate vehicle.



- Three days prior to bill or draft date, no changes can be made to existing account information.

- If deleting or changing EFT/recurring payments, the change will be effective on the upcoming installment due date.
- Once a bill has been generated, it must be paid, for any payment type. EFT/recurring payments will be effective on the following installment.
- EFT/recurring payments can only be added one time per policy term.

TREXIS REAL TIME RATING

Effective Date 10/10/2018

Any endorsement to policy 11-24-011805888 must be effective on or after 10/08/2018.

- EFT/Recurring Credit or Debit card endorsements must be effective today's date. -

Add EFT/RCC →

Save & Continue →

The endorsement quote is saved in the system for sixty (60) days.

Rewrite/Reinstate a Policy

A **rewrite button** is available for 6 months on lapsed/expired policies that are outside of the reinstatement period and on policies that have been cancelled per insured's request. Policies that have been non-renewed are not eligible to be rewritten.

Website Cancellations

There are two areas in the policy center to cancel policies.

- 1.) Through the Policy Search screen, by selecting the symbol on policies that are eligible to be cancelled online:

Documents	Options	Endorse	Cancel	Policy Number
				xxxxxxxx
			×	xxxxxxxx
			×	xxxxxxxx

Or

- 2.) after you have accessed the policy, you will be able to cancel from the Policy Screen:

Endorse

Cancel

Report a Claim

Upload Document

Cancels can be processed up to seven days prior to or seven days after the current date. Non-insured signatures must be faxed in or if the request is processed in the agency the signatures must be kept on file.

ADDITIONAL INFORMATION

Policies can be endorsed up to seven (7) days past the current date or thirty (30) days into the future.

Endorsements may not be processed on-line to policies that are cancelled or expired. Also, endorsements may not be processed to policies in pending cancellation status if they are due to cancel the following day.

Endorsements may not be processed to policies that are within 3 days of the expiration date. These endorsement requests must be faxed to **Customer Service at 1-877-684-7466.**

Saved (unbound) endorsements will be held in the system sixty (60) days. After that time, a new endorsement must be submitted.

When a new driver is added, an MVR will be ordered.

Fax endorsements to Customer Service at 1-877-684-7466 for changes to protected fields.

Please contact our **TECHNICAL SUPPORT DEPARTMENT** with any questions you may have or for additional assistance at 1-877-888-1712