

InformIns - Policy Admin System FAQ Sheet

INTERNET EXPLORER

Bridged Quote does not open properly after bridging from the rater	Internet Explorer is no longer supported Please Use Microsoft Edge or Google Chrome
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RESET PASSWORD

You may Reset your Password as desired	You will need to reset your Password the first time you bridge into or log into the new system
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USER NAME

User Name

PASSWORD

Password

SIGN IN

FORGOT YOUR PASSWORD?

FIRST TIME USERS

1ST TIME USERS CLICK HERE TO RESET YOUR PASSWORD

You will receive an e-mail with a link to reset your **Password**

Click the link below to download the **Training Manual** for the new **Policy Admin System**. It provides step-by-step instructions to easily complete the following transactions:

New Business – Payments – Endorsements – Policy Inquiries

Click here to Download the Policy Admin Training Manual

DOCUMENT UPLOADS - NEW BUSINESS

Uploading Policy Documents on New Business Submissions	Policy Documents for New Business Submissions may be uploaded during the binding process Drag and drop Policy Documents in the REQUIRED DOCUMENTS area at the bottom of the BIND screen **We encourage Full Document Retention - Policy Documents may ONLY be UPLOADED at POS with the App**
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NO WET SIGNATURES NEEDED – NO NEED TO UPLOAD THE APP

Required Documents	
Vehicles	2015/Jeep/CHEROKEE
Vehicle Registration	Optional
Photos	Optional
Drivers	ANTONIO ENRIQUEZ CORTES
Copy of license	Optional
Others	
Others	Optional

Drop files here to upload

eSIGNATURES - NEW BUSINESS

In Office eSign	Use the In Office eSign if the Customer is in your office during the New Business submission process
Remote eSign	Use the Remote eSign if the Customer is not in your office during the New Business submission process Remote eSign may also be used any time you prefer to have the customer sign and confirm coverage(s)

ALL NEW BUSINESS APPLICATIONS MUST BE eSIGNED - NO WET SIGNATURES

BINDING

Application Print / Sign Options

Select One	Description
<input checked="" type="checkbox"/> In Office eSign	Producer Has Customer eSign Application In Office
<input type="checkbox"/> Remote eSign	Producer Has Customer eSign NOT In Office (Insured email Required)

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REPRINTING POLICY DOCUMENTS

Policy Documents May Be Reprinted Using the DOCUMENTS Link

To reprint **Policy Documents** after an Application has been submitted and bound:

- Use the **POLICY SEARCH** in Evolve to locate the Policy
- Click the **VIEW POLICY** link on the right-hand side of the screen to open the selected Policy
- Click the **DOCUMENTS** link from the available Menu Items on the left-hand side of the screen
- Click the **VIEW DOCUMENTS** link for the **Policy Document(s)** you want to reprint

****The APPLICATION is included and is a part of the POLICY / DEC PAGE document(s)****

<ul style="list-style-type: none"> Policy Summary Policy History Policy Info Rewrite Endorsement OOSE Cancellation Non Renew Policy Suspense Diary Documents Billing System Notes <p style="text-align: center; background-color: #D3D3D3; padding: 5px;">Back to Search</p>	<div style="border-bottom: 1px solid #ccc; padding-bottom: 5px;"> <p>Policy Detail PRINT</p> </div> <div style="padding: 5px 0 5px 20px;"> <p>Insured Name/DBA</p> <p>Policy ID</p> <p>Policy Status</p> <p>Suspense/Diary: None</p> </div> <div style="border-bottom: 1px solid #ccc; padding-bottom: 5px;"> <p>Basic Documents and Packages</p> </div> <div style="padding: 5px 0 5px 20px;"> <p>Policy (Insured's copy) VIEW DOCUMENT</p> <p>Policy (Producer's copy) VIEW DOCUMENT</p> <p>ID Card VIEW DOCUMENT</p> <p>Policy Contract VIEW DOCUMENT</p> </div>
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POLICY ERROR MESSAGES

PolicyAddressDuplicate	The Address is a duplicate for the same named insured on a different policy
PolicyDoubleDeductible	Require Double Deductible, because no POP or Youngest Driver Age is less than 26
PolicyDuplicate	The Policy Number is a duplicate and already exists for this named insured
PolicyLiabilityOnly	The program has liability only
PolicyMinDownPay	Percentage (%) Down Payment Minimum Required
PolicyNewForClient	You selected the Carrier as Current Auto Insurer, but we cannot find your previous policy
PolicyNotClassification	Error with the Classification on the policy
PolicyRewrite	Cannot do Rewrite for the requested dates
PolicyUnacceptableRisk	The Unacceptable Risk was added
PolicyUseVehiclesMore	The number of vehicles on the policy rated with Business or Artisan Use is unacceptable
PolicyVhsMoreDrs	There are more vehicles than listed drivers

DRIVER ERROR MESSAGES

DriverAccidentsMany	Driver did not pass validation - more than two at fault accidents last 35 months
DriverAgeOld	Driver's age is unacceptable (too old)
DriverAgeSmall	Driver's age is unacceptable (too young)
DriverEmptyData	Driver is missing required data
DriverForeign	Driver is ineligible. Foreign driver license
DriverLicenseStatus	License status is unacceptable unless an SR filing will reinstate their license.
DriverMvrNoHit	Driver is ineligible. MVR is unobtainable
DriverNotClassification	Driver is ineligible.
DriverPointsMany	Driver did not pass Points validation due to too many points on MVR
DriversAccidentsMany	Drivers on this quote did not pass validation - more than two at fault accidents last 35 months
DriverSROutOfState	Driver is ineligible. We cannot do SR22 in designated state
DriverUnverifiableMVR	Driver is ineligible. Unverifiable MVR
DriverViolationsMany	Driver did not pass validation - Too many points in the specified number of months
FRLevel	Financial Responsibility Level error
NoFactors	No rating factors available

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COVERAGE ERROR MESSAGES

CoverageCannotBeHigher	Coverage limits must be the same for all vehicles listed
CoverageMandatory	Coverage limit is required
CoverageMaxSpeq	Special Equipment has value state value of \$XX for state vehicle
CoverageNeedBoth	Coverage must be selected based on other coverages listed on the policy
CoverageNeedOneFromTwo	Coverage cannot be selected based on other coverages listed on the policy
CoverageOneCompWithoutColl	Can only have one Comprehensive without Collision

VEHICLE ERROR MESSAGES

VehicleBusinessUse	Vehicle is ineligible. Not Commercial Use
VehicleByPassOrValueRated	Vehicle is ineligible. The VIN was a BYPASS or Value Rated
VehicleDifferentGarage	There are differnt garaging addresses - All vehicle must be garaged at the same address
VehicleGarageOutState	Vehicle is ineligible. Garage address is not the same
VehicleHighPerformance	Vehicle is ineligible. High Performance Vehicle
VehicleMinMileage	Vehicle Rated with unacceptable annual mileage. Underwriter review required to issue policy.
VehicleMSRPMaximum	Vehicle is ineligible. Vehicle MSRP exceeds maximum allowable
VehicleMSRPMinimum	Vehicle is ineligible. Vehicle MSRP is below minimum allowable
VehicleMSRPNeed	Vehicle is ineligible. MSRP needed on Vehicles screen
VehicleNewer	Vehicle is ineligible. A model year unacceptable.
VehicleNonOwner	Vehicle is ineligible. The policy cannot be rated as non-owner
VehicleNotTerritoryFactor	Vehicle is ineligible. Garage address does not have a territory factor
VehicleOlder	Vehicle is ineligible. No liability is written on vehicles older than specified model year
VehiclePhysicalDamage	Vehicle: Model Year unacceptable for Physical Damage
VehiclePremiumSmall	Vehicle is ineligible. The vehicles has premium of 0
VehiclePremiumUBI	Vehicle is ineligible for UBI
VehicleType	Vehicle type is UNACCEPTABLE
VehicleUnacceptable	Vehicle is ineligible. UNACCEPTABLE

PROOF OF PRIOR INSURANCE ERROR MESSAGES

POPNeedValidate	POP is only available with online prior insurance validation
POPPhysicalDamage	Physical Damage available if you have POP
UnknownError	Unknown Error

PROGRAM ERROR MESSAGES

NoRateLibrary	Rater library is undefined for program
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