

# Quick Reference—

## Updating Agency Information

Coastal's website provides our agents with the ability to self-manage their agency. The tools on the website will allow our agents to amend their contact information, view commission percentages, update E&O information, as well as add, remove or change agents. And it is all available 24/7!

### Accessing Agency Management

Sign into the website ([www.ciusolutions.com](http://www.ciusolutions.com)) using the primary email address and password.

Once logged in, hover over **My Profile**, and then click **Agency/Producer Management**. If you do not see this option sign out and sign in again as the primary account holder for the agency. If you do not know who is the primary account holder, please call us and we will assist you.



### Updating Contact Information

Agency Information

**Firm Information** Agency Background Producers Diligent Effort Favorites Documents / E&O Products / Commissions

Name of Firm: CIU Test Agency Agency License Number: TEST\_NUMBER

Taxpayer ID Number: TEST\_NUMBER Business Type: Corporation

D/B/A: Website: http://test.com

Phone: 904-285-7683 Fax: 9043950038

Year Established: 1982

**Principal Address**

Address Line 1: 816 A1A North, Ste. 206

Address Line 2:

City: Ponte Vedra Beach

State: Florida

Zip: 32082

**Mailing Address**

Address Line 1: P O Box 3140

Address Line 2:

City: Ponte Vedra Beach

State: Florida

Zip: 32004

Update

On the *Firm Information* tab you can update the agency's FEIN, phone and fax numbers, year established, the main agency license number, website as well as the mailing and physical address.

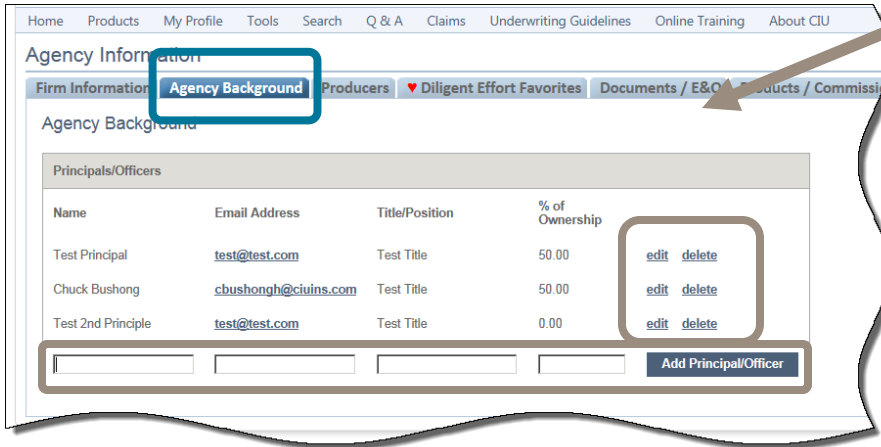
Make any changes (as necessary) and then click the **Update** button. If you do not click **Update**, any changes entered will not be saved.



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### Updating Principal & Officer Information



On the *Agency Background* tab you can update the information relative to the agency's owners and officers.

Click **edit** to amend the information for an principal/officer.

Click **delete** to remove an principal/officer.

To add a new principal/officer, enter the information in the blank fields and click **Add Principal/Officer**.

### Updating Agent (Producer) Information

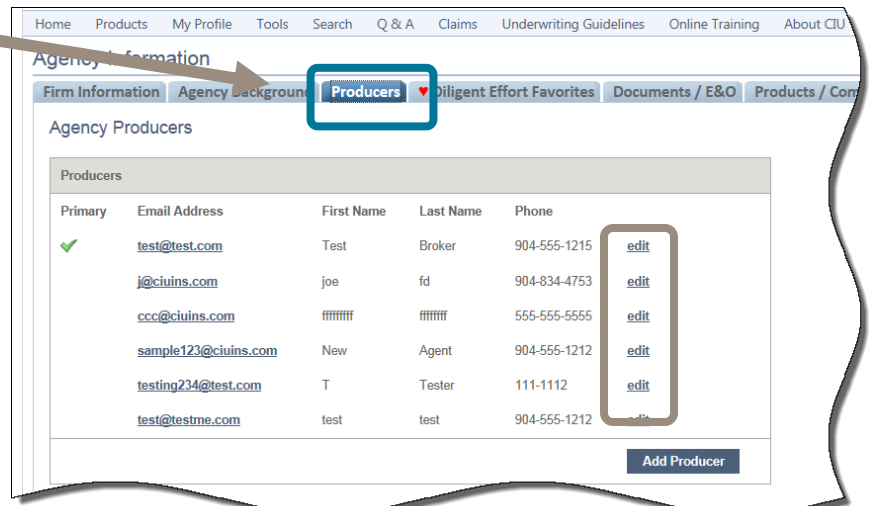
On the *Producer* tab you can manage all of the agents (producers) for your agency. This includes adding, removing and editing as well as resetting their passwords.

Click **edit** to amend the agent's information, reset the password or if you need to delete that agent.\*

Click **Add Producer** to add a new agent.\*

*NOTE: you can add CSR's and other service personal if you want.*

*\*See Page 3 for the next step in this process.*



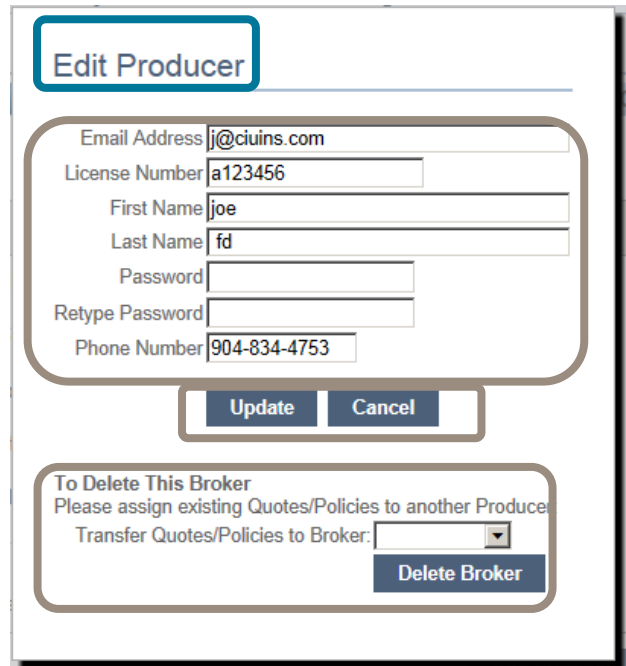
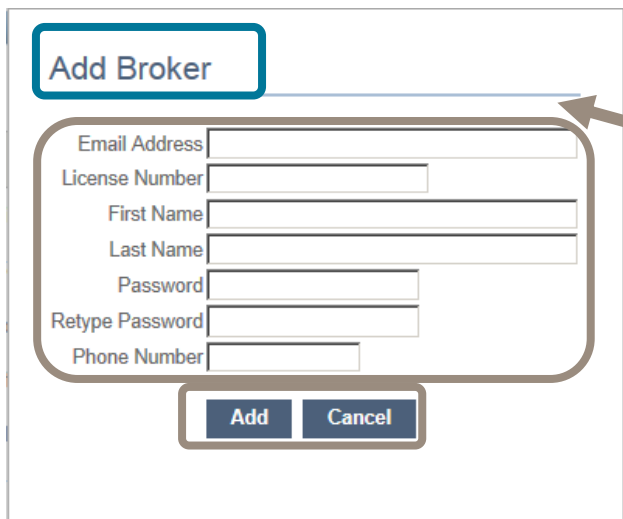
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The *Edit Producer* popup window appears when the **Edit** link is clicked.

**Edit Producer**—to make changed, simply type over the current information with the updated information and then click **Update**.

**Remove Producer**—First, using the drop down, select the producer you want to transfer all of the existing policies to and then click **Delete Broker**.

The *Add Broker* popup window appears when the **Add Producer** button is clicked.

Complete all fields and then click **Add**. The producer's login code is his or her email address.



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### Creating Diligent Effort Favorites

From the *Diligent Effort Favorites* tab, you can set favorites which will make completing the online diligent effort forms quick and easy.

Using the drop down box, choose the name of the insurance company you want to set as a favorite. If you do not see the company listed, choose **Other** and type in the name of the carrier.

Enter the contact persons name, phone number and declination reason (e.g., no product/market, zip code closed, etc.).

Once all information is entered, click **Add**.

### Viewing & Updating E&O Information (and other documents)

From the *Documents/E&O* tab you can review your agency appointment documents and upload new E&O information.

Click the **Producer Agreement** link to review a copy of your agency appointment agreement.

You can also click either **W9** or **Principal License** to see copies of the documents you provided Coastal.

To upload new E&O information:

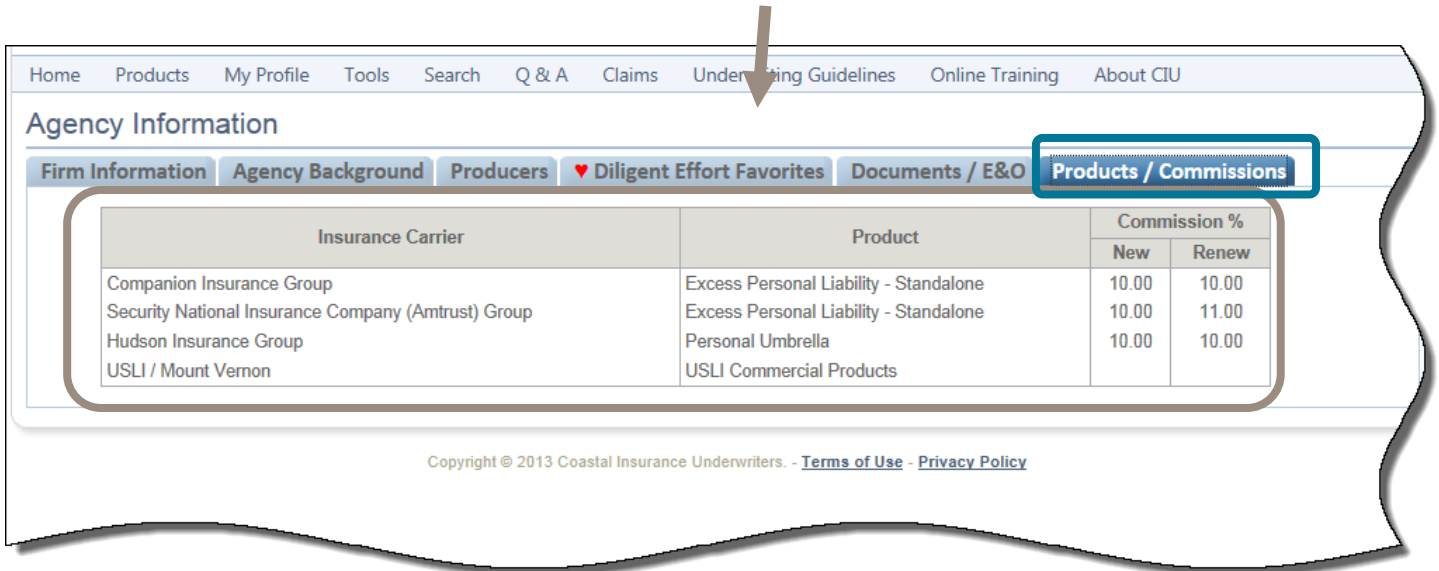
1. Complete the *E&O Insurance Company*, *Limits*, *Deductible*, and *Expiration Date* fields.
2. Click **Attached Errors & Omissions Declarations Page or current Certificate of Insurance** to upload a copy of the policy.
3. Click **Submit**.



## Updating Agency Information

### Viewing Products/Commissions Information

The *Products/Commissions* tab is where you can view the products your agency is appointed for AND the commission rate (new and renewal) for each product.



The screenshot shows a web interface for 'Agency Information'. At the top, there is a navigation menu with links: Home, Products, My Profile, Tools, Search, Q & A, Claims, Underwriting Guidelines, Online Training, and About CIU. Below this, the 'Agency Information' section has several tabs: Firm Information, Agency Background, Producers, Diligent Effort Favorites, Documents / E&O, and Products / Commissions. The 'Products / Commissions' tab is selected and highlighted with a blue box. An arrow points from the text above to this tab. Below the tabs is a table with the following data:

Insurance Carrier	Product	Commission %	
		New	Renew
Companion Insurance Group	Excess Personal Liability - Standalone	10.00	10.00
Security National Insurance Company (Amtrust) Group	Excess Personal Liability - Standalone	10.00	11.00
Hudson Insurance Group	Personal Umbrella	10.00	10.00
USLI / Mount Vernon	USLI Commercial Products		

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