RPS STANDARD EXPRESS^{SM}

STANDARD EXPRESS^{SM}

External User Manual

Contents

Access RPS Standard Express

Website Login

To access RPS Standard Express, log into https://my.rpsins.com with your pre-established login credentials. Click **RPS Standard Express**.
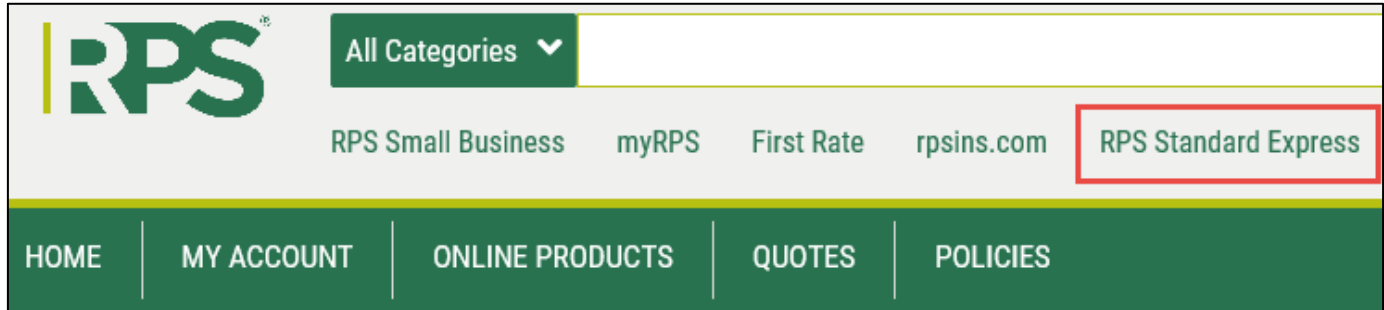
The website will route to RPS Standard Express. There are no additional login credentials needed; the site is single sign-on enabled.

Navigation

Home Page
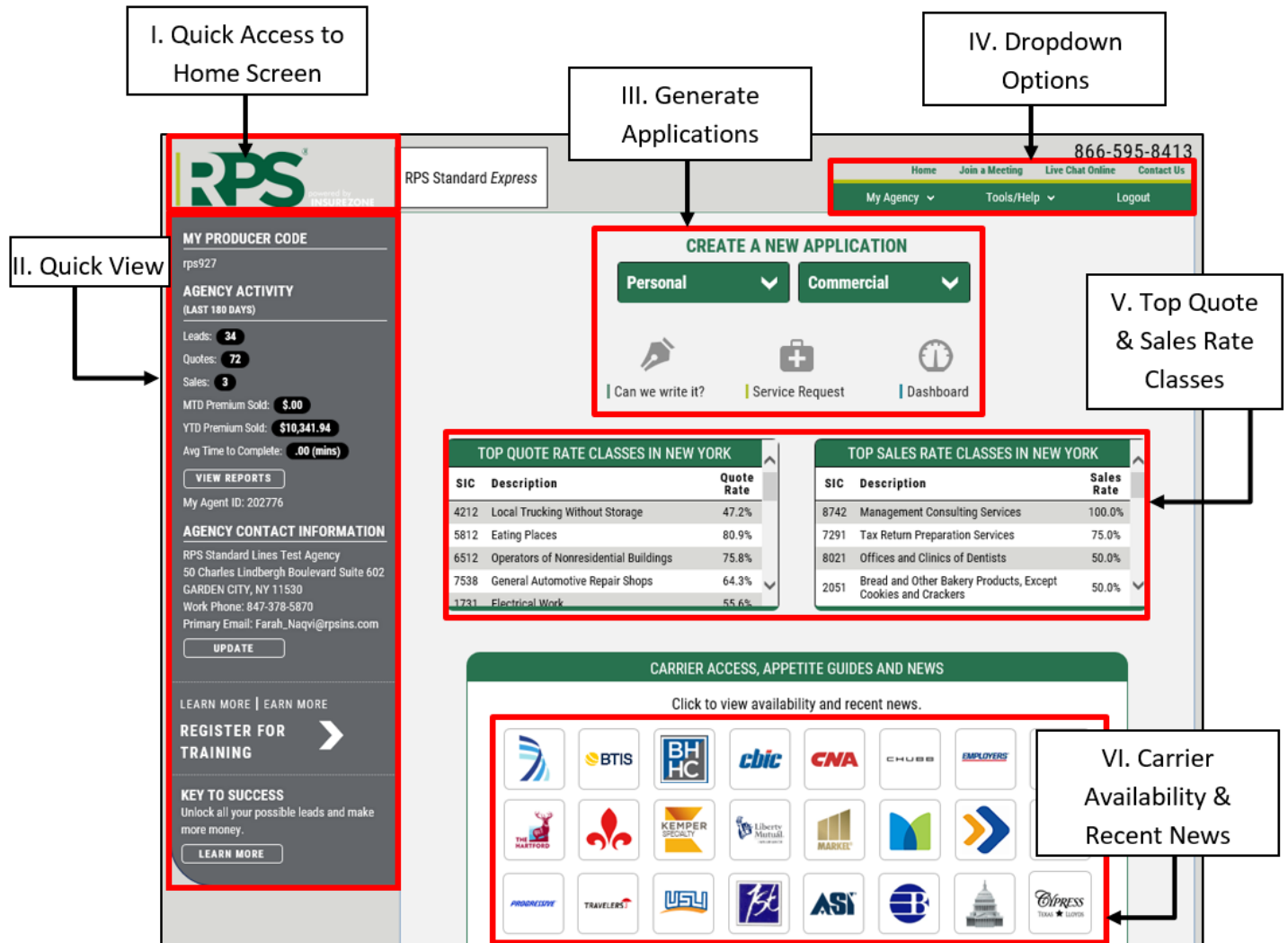
I. Quick Access to Home Screen

The RPS logo provides a quick access to the home page. As you continue to work throughout the website, clicking this button will be faster than clicking the back arrow.

II. Quick View

The left side of the home page is a dashboard for quick reference. The dashboard can be divided into the following categories:

MY PRODUCER CODE
rps927

View your RPS producer code here.

AGENCY ACTIVITY
(LAST 180 DAYS)

Leads: 34
Quotes: 72
Sales: 3
MTD Premium Sold: $.00
YTD Premium Sold: $10,341.94
Avg Time to Complete: .00 (mins)

VIEW REPORTS
My Agent ID: 202776

Track your agency's progress over the past 180 days here.

AGENCY CONTACT INFORMATION
RPS Standard Lines Test Agency
50 Charles Lindbergh Boulevard Suite 602
GARDEN CITY, NY 11530
Work Phone: 847-378-5870
Primary Email: Farah_Naqvi@rpsins.com

UPDATE

Your agency's contact information is listed here.

III. Generate Applications

For anything related to applications, navigate to the upper-center of the home page.

Personal ⌄	Commercial ⌄
Click **Personal** to begin a Personal Lines application.	Click **Commercial** to begin a Commercial Lines application.
Options available in dropdown:	
Home Auto Home Prefill Quick Quote Auto Motorcycle Other Available Lines ❯	BOP/Package General Liability Automobile Workers Compensation Umbrella Bonds Other Available Lines ❯
Options available upon selecting **Other Available Lines**:	

Umbrella	Multi-Line Application
Flood	Vacant Residential Property
Boat/Yacht	Other

Vacant Property	Professional Liability (E&O)
Builders Risk	Multi-Line Application
Flood	Contractors General Liability
Employment Practices	Directors & Officers
Agency E&O	
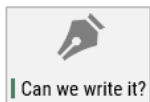
Click **Can we write it?** to view carrier availability in each state.
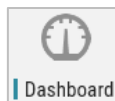
Click **Dashboard** to view the following:

- **Submitted Apps**
- **Unsubmitted Apps**
- **Re-Quotes Remarket**
- **Reports**
- **Policies**
- **Service Requests** *(coming soon)*

IV. Dropdown Options

The following buttons are available on the top right corner of the **RPS Standard Express** home page:

Home	Live Chat Online	Contact Us
Click the **Home** button to access the main icon page. As you continue to work throughout the website, clicking the **Home** button will be faster than clicking the back arrow.	**Live Chat Online** is a future feature that will allow you to chat with a live representative from RPS.	For RPS contact information, click **Contact Us**.

My Agency	Tools/Help	Logout
The **My Agency** dropdown provides the following options: • **Dashboard** • **Carrier Profiles** • **Reports** • **Commissions** • **Carrier Availability & Licensing**	The **Tools/Help** dropdown provides the following options: • **Forms** • **Policy Services** • **Renewals & Requotes** • **Quoting & Binding** • **Rollovers** • **Training & How To's** • **Technology**	To log out of the website, click the **Logout** button. Note: This will only log out of RPS Standard Express, not www.myrpsins.com.

V. Top Quote & Sales Rate Classes

Scroll through the **Top Quote Rate Classes** and **Top Sales Rate Classes** in the center of the screen to see a brief description and **Quote Rate** *(left)* and **Sales Rate** *(right)* within your state.

## VI. Carrier Availability & Recent News

Click the carrier icons in the lower-center of the screen for updates on carrier access, appetite and recent news.

Generate an Application

Application Navigation

Complete each application with as much information as possible. The icons ⬚ and ⬚ indicate required fields. Hover over any icon, including the ⬚ icon, for a description of the information needed in the field. These icons also indicate the format required in the field (example: MM/DD/YYYY).

The upper left corner of the application page displays the steps to complete the application, the **Application ID**, the date **Created** and the **Client Name**.
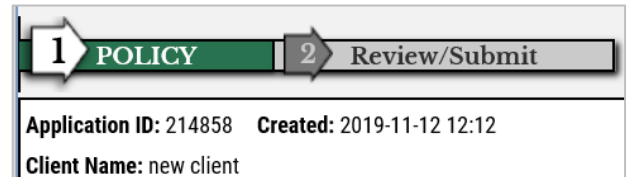
The upper right corner of the application page displays the number of required questions remaining and offers to **Save and Finish Later**. Clicking the exclamation point ⬚ identifies the number of "errors" (i.e. missing required fields or items requiring reformatting) on the application. Clicking the **Save and Finish Later** button will store the application in the **Dashboard**, under **Unsubmitted Apps**. To access incomplete applications in the **Dashboard**, click the ⬚ icon on the home screen, or hover over **My Agency** and click **Dashboard**. Then, click ⬚ on the top ribbon and find the incomplete application.

If you click the **Save and Finish Later** button in error, the application will be located in the **Unsubmitted Apps** tab in the **Dashboard**.

Once all necessary fields are completed on an application page, a **Continue** button will appear at the bottom of the page to proceed to the next application steps. If no **Continue** button is available, there is one or more errors on the page. Click the exclamation point ⬚ at the bottom of the page for a description of the error(s).

Any carrier quotes that are returned (quoted, not available, manual rating needed, declined, etc.) have any combination of the following icons:

Click the printer icon to print the carrier's quote. Click the list icon to get a revised proposal with different coverages, classification or to change answers on the application. Click the mail icon to ask questions or provide additional information if the quote is under **Underwriting Hold**.
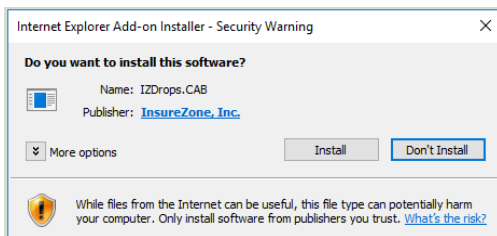
If this message appears when attempting to complete a quote, press **Install**. You will not be able to complete a quote until the proper add-on is installed.

Personal Lines

Related Videos: Home Prefill   Lead Underwriting Tools   Carrier Results

The following are the application types and lines available within each personal lines application.

Application Type	Lines Available within Application	Additional Information
Home	Home	If completing a home application, use the **Home Prefill** option. For a short video on how to complete a Home Prefill application, click here.
	Personal Auto	
	Personal Umbrella	
Auto	Home	If completing an auto application, use the **Home Prefill** option. For a short video on how to complete a Home Prefill application, click here.
	Personal Auto	
	Personal Umbrella	
Home Prefill	Home	Complete the preliminary information on the **Home Prefill** site. The website will fill the remainder of the home application with information received by CoreLogic, if available. This is the fastest way to complete a home application.
	Personal Auto	
	Personal Umbrella	Note: If the website is able to prefill the entire application (via CoreLogic), the field labeled **Home Prefill Status** will say **Available**. If the field says **Incomplete**, the website will only be able to prefill 20% of the home application and the rest will need to be inputted.
		For a short video on how to complete a Home Prefill application, click here
Quick Quote Auto	Home	To complete a shorter auto application, click **Quick Quote Auto**.
	Personal Auto	Note: CoreLogic does not prefill any part of this application.
Motorcycle	ATV/Offroad Vehicle	These are manual applications. Users must complete the PDF application and submit to RPS for consideration.
	Boat	
	Motor Home	
	Motorcycles	
	RV	
	Trailer	
	Umbrella	
Other Available Lines	ATV/Offroad Vehicle	These are manual applications. Users must complete the PDF application and submit to RPS for consideration.
	Boat	
	Motor Home	
	Motorcycles	
	RV	
	Trailer	
	Umbrella	

Personal Lines Application

The following procedure is how to complete a Personal **Auto** application. Note that if completing a **Home** application, the fastest way is to select **Home Prefill.** For a short video on how to complete a Home Prefill application, click here.

Completing other personal applications will be similar to the steps outlined below:

1. Click **Personal**, then **Auto**.
2. Complete all required information on each section of the application.

3. Click **Submit Application for Quoting**.
4. Choose any optional carrier endorsements and click **Continue Submission**.
5. Choose the carriers from whom you'd like to receive quotes and press **Continue Submission**. The default is to set to all available carriers for quoting.

6. Select the client's name under **Submitted Apps** to see the quotes from various carriers. Depending on the internet speed, this may take up to several minutes for all carriers to provide quotes.

7. Click **All Results** to ensure there are no other possible quotes that require additional information. For more detailed information about the carrier and quote, click **Lead Info**. For a short video on **Lead Info**, click here.

Edit App allows you to edit the application as needed. **App Summary** converts the completed application to a PDF and downloads the file onto your computer.

8. Click on individual carrier icons for more specific details about the quotes. Potential terms that accompany the carrier responses:

Term	Definition Video Explanation
$x,xxx	The carrier is interested in the business and has returned a quote. Click icon for more information.
Declined	The carrier has declined the business. Click icon for more information.
Excluded	The carrier is unable to return a quote. Click icon for more information.
Error	The carrier website is having technical difficulties. Click icon for more information to resolve the issue.
Manual	The carrier is interested in the business but the application needs to be completed by an RPS Account Executive. Once the manual rate has been completed by the RPS Account Executive, you will see a quote under the proper carrier and will be able to submit a bind request as outlined below.
Underwriting Hold	The carrier is interested in the business but needs additional information to proceed with a quote.

Note: Below the **Carrier Results** you may find **Insured Details** (including **Helpful Links**) and updates on the status of the application in **Lead History**.

For a short video on carrier results, click here.

9. Click a specific carrier for more detailed information about the quote, including the premium, **Quote Summary** and **Assumptions and Coverage Changes**.

Click and review **Assumptions and Coverage Changes** to ensure the carrier's assumptions are accurate. The website will not allow you to submit a bind request until this section is reviewed in full. At the top or bottom of this page, click View Proposal to download the carrier's proposal. If satisfied, click Submit Bind Request. This will automatically route the request to an Underwriter for service.

If the carrier's assumptions require edits, click Edit Resubmit to reopen the application. Edit the section(s) as needed, pressing **Continue** to page through the application. If satisfied with the

package, click **Submit Application for Quoting**. This will automatically route the request to an Underwriter for service. You will also receive a confirmation email in your inbox.

Click **View Payment Options** to review the payment plan options through the carrier.

Click **Submit Bind Request** to begin the binding process. Review the information already populated for accuracy. Complete the remainder of the information and press **Continue**. Note: If there is no option to **Continue**, click the exclamation mark to view the items that require correction.

As stated in the pop-up, review the information on the page for accuracy.

Certain carriers require you to bridge prior to submitting a bind request. If a **Bridge** button is displayed and you would like to submit a bind request, you must first press the **Bridge** button before submitting the bind request. Click **Continue** on the pop-up window and press **Submit Bind Request**.

Once the request has been submitted, you will receive a confirmation pop-up message and email.

The Dashboard will now reflect a submitted bind request (click the insured's name to reveal the carrier icons on the right):

Click the carrier's icon to view the proposal, edit and resubmit the application, view the payment options, view the submitted bind request and rescind the bind request.

| View Proposal | Edit Resubmit | View Payment Options | View Submitted Bind Request | Rescind Bind Request |

Commercial Lines

Related Videos: [Submitting an Application](#)   [Carrier Results](#)

[Lead Underwriting Tools](#)   [PDF Upload](#)

The following are the commercial lines application types.

Application Type
BOP/Package
General Liability
Automobile
Workers Compensation
Umbrella
Other Available Lines: Vacant Property
Other Available Lines: Builders Risk
Other Available Lines: Employment Practices
Other Available Lines: Agency E&O
Other Available Lines: Professional Liability (E&O)
Other Available Lines: Contractors General Liability
Other Available Lines: Directors & Officers

Commercial Line Application

The following procedure is how to complete a Commercial **BOP/Package** application. For a short video on how to start a commercial application, click here. Completing other commercial applications will be similar to the steps outlined below:

1. Click **Commercial**, then **BOP/Package**
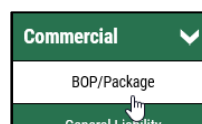
2. Enter the **Rating Zip** code and press Enter. The city, state and county will auto-populate with the correct information.

3. Search for the business using the option **By Phrase**, **Each Word**, **By SIC** or **By NAICS**. If using a keyword/phrase, click the corresponding industry (to the right) to narrow the search parameter.

Example:

    a. The search term, "**bar**" yields 160 lines of options within the zip code 60008.

    b. Selecting **Service** (under **Industry)** narrows the scope of the search to 10 lines within 60008.

4. Choose the appropriate **General Business Description**, then the best **Carrier Classification**.

5. On the **Commercial Lines Carrier Availability**, choose one of the following options:

Note: Explanation on how to use each of these buttons is as follows:

Start a New Full Quote
Application

To complete a **New Full Quote Application**, follow the steps below. Note that no information will auto-populate into this application.

a. Click **Start a New Full Quote Application**.

b. Complete the required fields on each page of the application.

c. Click **Submit Application for Quoting**.

d. Choose the carriers from whom you'd like to receive quotes and press **Continue Submission**.

> By default the application will be submitted to each carrier listed below, if a quote is not desired from a specific carrier please uncheck.
>
> BOP
> ☑ Chubb
> ☑ Travelers
> ☑ USLI
> ☑ Liberty Mutual
> ☑ MetLife
>
> [Continue Submission]

e. Wait for the platform to receive quotes from the individual carriers. Depending on internet speed, this may take up to several minutes to complete.

f. Click **All Results** to ensure there are no other possible quotes that require additional information. For more detailed information about the carrier and quote, click **Lead Info**. For a short video on **Lead Info**, click here.

> Sep 6, 2019 11:27:10 AM
> Quote for Flowers Inc.
> Edit App 5715147   Lead Info
> Acord
> Line: BOP
> All Results: 26
> CHUBB TRAVELERS USLI   Liberty Mutual
>
> View all applications

Edit App allows you to edit the application as needed. **Acord** converts the corresponding Acord forms to a PDF and downloads the selected file(s) onto your computer. You may also edit the forms through the **Acord** button.

g. Click on individual carrier icons for more specific details about the quotes. Potential terms that accompany the carrier responses:

Term	Definition Video Explanation
$x,xxx	The carrier is interested in the business and has returned a quote. Click icon for more information.
Declined	The carrier has declined the business. Click icon for more information.
Excluded	The carrier is unable to return a quote. Click icon for more information.
Error	The carrier website is having technical difficulties. Click icon for more information to resolve the issue.

Manual	The carrier is interested in the business but the application needs to be completed by an RPS Account Executive. Once the manual rate has been completed by the RPS Account Executive, you will see a quote under the proper carrier and will be able to submit a bind request as outlined below.
Underwriting Hold	The carrier is interested in the business but needs additional information to proceed with a quote.

Note: Below the **Carrier Results** you can find **Insured Details** (including **Helpful Links**) and updates on the status of the application in **Lead History**.

For a short video on carrier results, click here.

h. Click a specific carrier for more detailed information about the quote, including the premium, **Quote Summary** and **Assumptions and Coverage Changes**.

Click and review **Assumptions and Coverage Changes** to ensure the carrier's assumptions are accurate. The website will not allow you to submit a bind request until this section is reviewed in full. At the top or bottom of this page, click ⌞View Proposal⌝ to download the carrier's proposal. If satisfied, click ⌞Submit Bind Request⌝. This will automatically route the request to an Underwriter for service.

If the carrier's assumptions require edits, click **Edit Resubmit** to reopen the application. Edit the section(s) as needed, pressing **Continue** to page through the application. If satisfied with the package, click **Submit Application for Quoting**. This will automatically route the request to an Underwriter for service. You will also receive a confirmation email in your inbox.

Click **View Payment Options** to review the payment plan options through the carrier.

Click **Submit Bind Request** to begin the binding process. Review the information already populated for accuracy. Complete the remainder of the information and press **Continue**. Note: If there is no option to **Continue**, click the exclamation mark to view the items that require correction.

As stated in the pop-up, review the information on the page for accuracy.

Certain carriers require you to bridge prior to submitting a bind request. If a **Bridge** button is displayed and you would like to submit a bind request, you must first press the **Bridge** button before submitting the bind request. Click **Continue** on the pop-up window and press **Submit Bind Request**.

Once the request has been submitted, you will receive a confirmation pop-up message and email.

The Dashboard will now reflect a submitted bind request (click the insured's name to reveal the carrier icons on the right):

Click the carrier's icon to view the proposal, edit and resubmit the application, view the payment options, view the submitted bind request and rescind the bind request.

Start a New Quick Quote
Application

To complete a **New Quick Quote Application**, follow the steps below. Note that no information will auto-populate into this application.

a. Click **Start a New Quick Quote Application**.

b. Complete the required fields on each page of the application.

c. Click **Submit Application for Quoting**.

d. Choose the carriers from whom you'd like to receive quotes and press **Continue Submission**.

> By default the application will be submitted to each carrier listed below, if a quote is not desired from a specific carrier please uncheck.
>
> BOP
> ☑ Chubb
> ☑ Travelers
> ☑ USLI
> ☑ Liberty Mutual
> ☑ MetLife
>
> Continue Submission

e. Wait for the platform to receive quotes from the individual carriers. Depending on internet speed, this may take up to several minutes to complete.

f. Click **All Results** to ensure there are no other possible quotes that require additional information. For more detailed information about the carrier and quote, click **Lead Info**. For a short video on **Lead Info**, click here.

> Sep 6, 2019 11:27:10 AM
> Quote for Flowers Inc.
> Edit App 5715147   Lead Info
> 🅰 Acord
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> Line: BOP
> All Results: 26
>
> CHUBB   TRAVELERS   USLI   ◧   Liberty Mutual
>
> View all applications

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Note: Below the **Carrier Results** you can find **Insured Details** (including **Helpful Links**) and updates on the status of the application in **Lead History**.

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h. Click a specific carrier for more detailed information about the quote, including the premium, **Quote Summary** and **Assumptions and Coverage Changes**.

Click and review **Assumptions and Coverage Changes** to ensure the carrier's assumptions are accurate. The website will not allow you to submit a bind request until this section is reviewed in full. At the top or bottom of this page, click [View Proposal] to download the carrier's proposal. If satisfied, click [Submit Bind Request]. This will automatically route the request to an Underwriter for service.

If the carrier's assumptions require edits, click **Edit Resubmit** to reopen the application. Edit the section(s) as needed, pressing **Continue** to page through the application. If satisfied with the package, click **Submit Application for Quoting**. This will automatically route the request to an Underwriter for service. You will also receive a confirmation email in your inbox.

Click **View Payment Options** to review the payment plan options through the carrier.

Click **Submit Bind Request** to begin the binding process. Review the information already populated for accuracy. Complete the remainder of the information and press **Continue**. Note: if there is no option to **Continue**, click the exclamation mark to view the items that require correction.

As stated in the pop-up, review the information on the page for accuracy.

Certain carriers require you to bridge prior to submitting a bind request. If a **Bridge** button is displayed and you would like to submit a bind request, you must first press the **Bridge** button before submitting the bind request. Click **Continue** on the pop-up window and press **Submit Bind Request**.

Once the request has been submitted, you will receive a confirmation pop-up message and email.

The Dashboard will now reflect a submitted bind request (click the insured's name to reveal the carrier icons on the right):

Click the carrier's icon to view the proposal, edit and resubmit the application, view the payment options, view the submitted bind request and rescind the bind request.

Import an ACORD PDF to Start a New Application
Drop your file here or browse

Import an ACORD PDF to Start a New Application
Drop your file here or browse

Using the **Import an ACORD PDF** button will auto-populate many required fields in an application. To import a PDF, follow these steps:

a. Browse your computer to find the appropriate ACORD form.
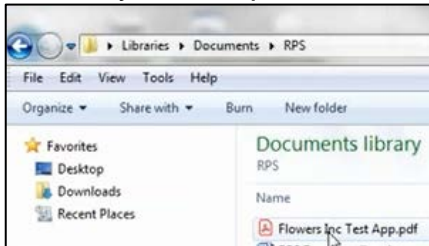
b. Drag the PDF document to the blue **Import an ACORD PDF** button.
Note: The button will turn yellow when a PDF hovers over it.
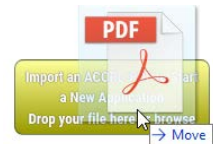
c. Wait for the document to upload

Please Wait …
Uploading ACORD PDF to Start New Application …
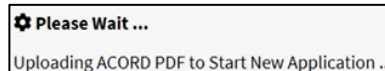
d. Once the upload is successful, choose to create a **Quick Quote** or a **Full Quote**.

Data Extraction Successful!
Data Points Extracted: 140
Would you like to start a quick quote* or a full quote? Quick Quote Full Quote
*Quick quotes will need to be converted to full quotes to be bindable.
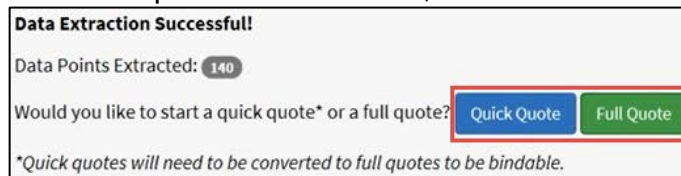
e. Complete the required fields on each page of the application.

f. Click **Submit Application for Quoting**.

g. Choose the carriers from whom you'd like to receive quotes and press **Continue Submission**.

By default the application will be submitted to each carrier listed below, if a quote is not desired from a specific carrier please uncheck.

BOP
☑ Chubb
☑ Travelers
☑ USLI
☑ Liberty Mutual
☑ MetLife

Continue Submission
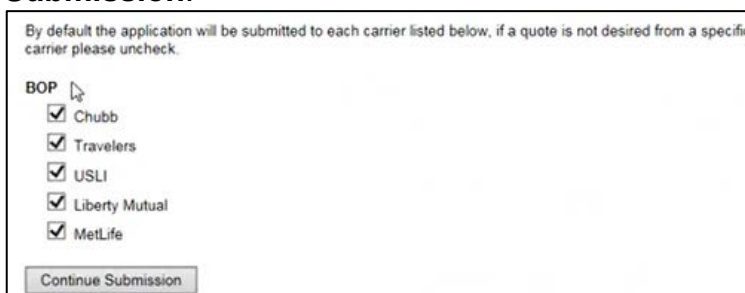
h. Wait for the platform to receive quotes from the individual carriers. Depending on internet speed, this may take up to several minutes to complete.
For a short video on steps a-h, click here.

i. Click **All Results** to ensure there are no other possible quotes that require additional information. For more detailed information about the carrier and quote, click **Lead Info**. For a short video on **Lead Info**, click here.

Edit App allows you to edit the application as needed. **Acord** converts the corresponding Acord forms to a PDF and downloads the selected file(s) onto your computer. You may also edit the forms through the **Acord** button.

j. Click on individual carrier icons for more specific details about the quotes. Potential terms that accompany the carrier responses:

Term	Definition Video Explanation
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Excluded	The carrier is unable to return a quote. Click icon for more information.
Error	The carrier website is having technical difficulties. Click icon for more information to resolve the issue.
Manual	The carrier is interested in the business but the application needs to be completed by an RPS Account Executive. Once the manual rate has been completed by the RPS Account Executive, you will see a quote under the proper carrier and will be able to submit a bind request as outlined below.
Underwriting Hold	The carrier is interested in the business but needs additional information to proceed with a quote.

Note: Below the **Carrier Results** you can find **Insured Details** (including **Helpful Links**) and updates on the status of the application in **Lead History**.

For a short video on carrier results, [click here](#).

k. Click a specific carrier for more detailed information about the quote, including the premium, **Quote Summary** and **Assumptions and Coverage Changes**.

Click and review **Assumptions and Coverage Changes** to ensure the carrier's assumptions are accurate. The website will not allow you to submit a bind request until this section is reviewed in full. At the top or bottom of this page, click [View Proposal] to download the carrier's proposal. If satisfied, click [Submit Bind Request]. This will automatically route the request to an Underwriter for service.

If the carrier's assumptions require edits, click [Edit Resubmit] to reopen the application. Edit the section(s) as needed, pressing **Continue** to page through the application. If satisfied with the package, click [Submit Application for Quoting]. This will automatically route the request to an Underwriter for service. You will also receive a confirmation email in your inbox.

Click **View Payment Options** to review the payment plan options through the carrier.

Click **Submit Bind Request** to begin the binding process. Review the information already populated for accuracy. Complete the remainder of the information and press **Continue**. Note: if there is no option to **Continue**, click the exclamation mark to view the items that require correction.

As stated in the pop-up, review the information on the page for accuracy.

Please review summary and click submit button at bottom of page

Certain carriers require you to bridge prior to submitting a bind request. If a **Bridge** button is displayed and you would like to submit a bind request, you must first press

the **Bridge** button before submitting the bind request. Click **Continue** on the pop-up window and press **Submit Bind Request**.

Once the request has been submitted, you will receive a confirmation pop-up message and email.

The Dashboard will now reflect a submitted bind request (click the insured's name to reveal the carrier icons on the right):

Click the carrier's icon to view the proposal, edit and resubmit the application, view the payment options, view the submitted bind request and rescind the bind request.

My Agency

My Agency includes information about applications, carriers and production reports.

The **My Agency** dropdown provides the following options:	
Dashboard	Click **Dashboard** to view **Submitted Apps**, **Unsubmitted Apps**, **Re-Quotes**, **Remarket**, **Reports**, **Policies** and **Service Requests** *(coming soon)*.
Carrier Profiles	Click **Carrier Profiles** to view the carriers available within your state.
Reports	Click **Reports** to generate customized reports on production, commissions, 1099s, renewals, cancellations, loss reports, invoices and in-force policies.
Commissions	Click **Commissions** to access the direct deposit form.
Carrier Availability & Licensing	Click **Carrier Availability & Licensing** to view available carriers by state and line of business. Users may also contact RPS regarding licensing questions.

Dashboard   [Dashboard Overview Video](#)

The **Dashboard** is the major source of record-keeping information that contains data on:

- Submitted Apps
- Remarket
- Service Requests
  (coming soon)

- Unsubmitted Apps
- Reports

- Re-Quotes
- Policies

There are two ways to access the **Dashboard**:
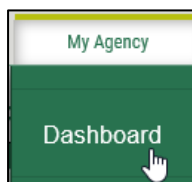
a) hover over **My Agency** then click **Dashboard**, or

b) click the **Dashboard** icon on the home page.
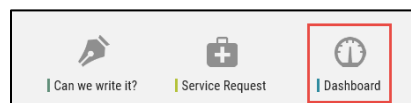
Basic Navigation

To find specific information within each tab or to filter the current list, use the search icon.

The search criteria changes depending on the tab in which you conduct the search. When using this icon, the site will only search for information within that specific tab, not within all tabs. The search icon is not available in the **Reports** tab.

Narrow the search by entering specific information. Note: If searching by **Insured Name**, you must enter the name in the exact format as is displayed in the list below. This may mean you must enter the insured's name as *Smith, Jane* not *Jane Smith*.

If you are unable to find the desired information through the search function, clicking [Show All] *(if available)* will return the list to the screen.

There are options for additional information under the tabs **Unsubmitted Apps** and **Remarket**. These specific tabs allow you to **Tour the Dashboard** and view a **Legend** of common abbreviations on the site.

The Dashboard Tour the Dashboard Legend

While not the primary function of the Dashboard, you may start a new application on this screen too.

Start a new app: Personal ▾   Commercial ▾

The following tabs are available within the Dashboard:

✔ Submitted Apps | ⏱ Unsubmitted Apps | ⟳ Re-Quotes | 🏷 Remarket | ⚑ Reports | ⚡ Policies | 🛄 Service Requests

Submitted Apps

Submitted Apps allows you to review submitted quotes, view premium indications and obtain more detailed information about individual applications.

The filter icon is only available in the **Submitted Apps** tab. The filter options change dynamically based on the options you select.

Line: ☐ PL ☐ CL   **Status :** ☐ Quoted ☐ Manual ☐ UWHold ☐ Bound ☐ Error ☐ Declined

There are additional options on the bottom of this page, including:

[Show More Clients]   [Refresh Results]   [Create New... ▾]

Click **Show More Clients** to enlarge the list of submitted applications. If there is a submitted application that is not yet appearing on the list, click **Refresh Results**. To create an application, click **Create New** and select the appropriate application type.

Unsubmitted Apps

Unsubmitted Apps contains incomplete applications. The items stored under this tab are usually the result of clicking the **Save and Finish Later** button on an application.

[Save and Finish Later] ❗

To complete an application already begun, click the corresponding link under **App#**

App#	Client Name	Description	User	Created	BOP	General Liability	Prof Liability	Worker's Comp	Comm Auto	Umbrella	Home	PersAuto	Pers Umbrella	Locations	Drivers	Vehicles	Trailers
215224qq	Smith, Jane	new application	Farah Naqvi	11/21/19 01:06:07 PM								✔		1	0	0	-
215218qq	new client	new application	Rob Eck	11/21/19 12:28:38 PM										-	-	-	-
215197	Moghrabi, Isaac	copied application	Rob Eck	11/21/19 08:34:26 AM							✔			-	-	-	-
215172	Kemp, Sandra J	new application	Sandra Kemp	11/20/19 03:08:23 PM							✔	✔		1	1	1	-
215161	Test, Amy	copied application	Farah Naqvi	11/20/19 11:05:07 AM							✔			-	-	-	-

You can also begin a new application or request a new quote for flood insurance at the bottom of this screen:

Submit a New Commercial Lines Application	Request a New Quote for Flood Insurance	Submit a New Personal Lines Application

Re-Quotes

Re-Quotes displays any policy that has been requoted. Policies are typically requoted 60 days before the anticipated renewal. This screen will show last year's premium compared to this year's premium.

Each application in this section has an option to request a bindable quote by editing the application with current values.

> This is a premium indication based on last year's submission, and is **not** bindable.
> To request a bindable quote, click here to edit the application and update the application with current values.

The Re-Quotes tab is divided into three sub-tabs:

Re-Quoted Apps	Manual Action	No Appetite

Depending on the screen selected, there may be the following icons 🖨 📝 ✉

These icons allow you to:
- print
- get a revised proposal with different coverages, classification or to change answers on the app
- contact the Underwriter. When contacting the Underwriter, include specific details about the reason for your contact and click **Submit**.

Email the Assigned Underwriter

underwriting@rpsins.com

212774 - New Venture Restaurant (CBIC, BOP)

Regarding Risk Placement Services, Inc. CBIC, BOP application #212774 'New Venture Restaurant':

Cancel | Submit

The **Re-Quoted Apps** tab displays applications that have a premium indication from at least one carrier based on a submission from last year. At least one line of business from an earlier submission was not sold, and may represent an opportunity for you and your agency.

Click the corresponding **Client Name** to see a comparison of underwriting results for the re-quoted application with last year's submission.

Re-Quoted Date	Effective Date	Client Name
10/01/2019	12/01/2019	New Venture Restaurant
11/21/2018	01/21/2019	Berkshire FL FLorist

Click the quote, message or abbreviation for further information about the carrier's quote. Click any blank spaces for information for more information about the lack of quote.

For	Line	CBIC	Chubb	CNA	Hartford	Liberty Mutual	MSA
This Year	BOP	N/A		$13,021	$3,975	N/A	ProcessPendingVerification
Last Year	BOP	N/A		$12,587	$3,859	N/A	E

Depending on the carrier's quote, you may be able to view the carrier's proposal, edit and resubmit the original application, view the payment options, submit a bind request or submit a bridge (resubmit to a carrier), email support at RPS, or resolve an underwriting hold.

The **Manual Action** tab displays quotes that require your help. There is one or more carriers interested in quoting the application. If it is worth pursuing, you should contact your underwriter and ask for it to be manually quoted.

Click the corresponding **Client Name** to see a comparison of underwriting results for the re-quoted application with last year's submission.

Re-Quoted Date	Effective Date	Client Name
10/01/2019	12/01/2019	New Venture Restaurant
11/21/2018	01/21/2019	Berkshire FL FLorist

Click the quote, message or abbreviation for further information about the carrier's quote. Click any blank spaces for information for more information about the lack of quote.

For	Line	CBIC	Chubb	CNA	Hartford	Liberty Mutual	MSA
This Year	BOP	N/A		$13,021	$3,975	N/A	ProcessPendingVerification
Last Year	BOP	N/A		$12,587	$3,859	N/A	E

Depending on the carrier's quote, you may be able to view the carrier's proposal, edit and resubmit the original application, view the payment options, submit a bind request or submit a bridge (resubmit to a carrier), email support at RPS, or resolve an underwriting hold.

<div align="center">No Appetite</div>

The **No Appetite** tab represents at least one line of business from an earlier submission for the listed client(s) was not sold, and may represent an opportunity for you and your agency. While no carriers currently indicate an appetite for the business from last year, the potential for a quote may exist. Click the client name to see a comparison of underwriting results for the re-quoted application with last year's submission.

Click the corresponding **Client Name** to see a comparison of underwriting results for the re-quoted application with last year's submission.

Re-Quoted Date	Effective Date	Client Name
10/01/2019	12/01/2019	New Venture Restaurant
11/21/2018	01/21/2019	Berkshire FL FLorist

Click the quote, message or abbreviation for further information about the carrier's quote. Click any blank spaces for information for more information about the lack of quote.

For	Line	CBIC	Chubb	CNA	Hartford	Liberty Mutual	MSA
This Year	BOP	N/A		$13,021	$3,975	N/A	ProcessPendingVerification
Last Year	BOP	N/A		$12,587	$3,859	N/A	E

Depending on the carrier's quote, you may be able to view the carrier's proposal, edit and resubmit the original application, view the payment options, submit a bind request or submit a bridge (resubmit to a carrier), email support at RPS, or resolve an underwriting hold.

Remarket *(Coming Soon)*

The **Remarket** tab is an upcoming feature that will be used for policies that need to be remarketed for one of the following reasons: non-renewal, cancellation, significant rate change or carrier appetite.

Reports

Reports can only be run by your agency's primary user (usually the principal of the agency).

Policies

The **Policies** tab displays all in-force policies *(coming soon)* over a period of time (the default is for the past 365 days). To export this data to Excel, click **View Current Results in Excel**. To view all in-force policies in Excel, click **Export All Policies in Force to Excel**.

The data available in this tab includes:

- Policy Number
- Carrier
- Name Insured
- PIF
- Line
- Effective Date
- Expiration Date

- Cancelled
- Annual Premium
- Expected Renewal Premium
- % Change
- Svc Status Code
- Request Type
- New Service Request *(coming soon)*

To sort column header in ascending or descending order, click the column title. To narrow the search to a specific policy, use the search option at the top of the screen.

For more detailed information about the policy activity, click the policy number.

✔ Submitted Apps	⏱ Unsubmitted Apps	⟳ Re-Quotes	🏷 Remarket	⚑ Reports	⚡ Policies	🗂 Service Requests

1 item found.   1

Policy Number	Carrier	Named Insured	PIF	Line	Effective Date	Expiration Date	Cancelled	Annual Premium	Expected Renewal Premium	% Change	Svc Status Code	RequestType	New Service Request
6011802658	CNA	Pathways Core Training In...	Y	XLS	11/16/17	11/16/18	No	606		NA	0		Create

To contact RPS for service, click **Email Service**. This action opens an email to RPS.CL.Service@rpsins.com (Commercial Lines) or RPS.PL.Service@rpsins.com (Personal Lines) with pre-populated information, including carrier, LOB and policy number. Complete the email with specific details and press **Send**. It is important to check your email regularly to continue corresponding with the RPS Servicer.

Policy Activity Summary

Insured Name: Pathways Core Training Inc
Sold By Underwriter:
Carrier: CNA
Line: XLS
App ID:

Policy Information
Policy Number: 6011802658
Effective Date: 11/16/17
Cancel Date:
Status: REN

Premium Information
Sales Premium: 0.00
Written Premium: 606.00
Agent Commission: 53.00
Expected Renewal Premium: 0.00
Renewal Status:
Renewal Status as of:
Renewal Status Effective Date:
Renewal Status Posted Date:
Policy In Force: Y

Service Requests   [Email Service]   [New Service Request]

No items found.   1
Sv Req Id	Request Type	Description	Submit Date	Effective Date	Email Service
		Nothing found to display			

Transactions
2 items found, displaying 1 to 2   1
Effective Date	Transaction Date
2017-11-16	2017-10-04
2015-11-16	2015-10-03

For a quick glance at the data, the **Summary** section displays the **Number of Policies** and **Total Annual Premium**.

Summary	
Number of Policies	Total Annual Premium
84	$123,456

If you are unable to find a particular policy, use the email link at the bottom of the page to directly contact RPS.CL.Service@rpsins.com (Commercial Lines) or RPS.PL.Service@rpsins.com (Personal Lines).
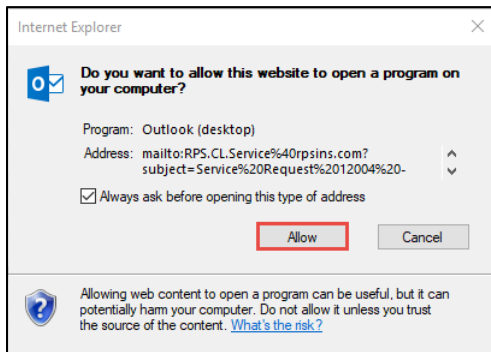
Note: If this pop-up message appears on your screen, click **Allow** *to permit the email to open.*

Carrier Profiles

The **Carrier Profiles** button provides information on the carriers that may provide quotes.

You have the ability to display carriers according to the criteria on the left. Click once on an icon to hide the corresponding carrier profiles. Click again to re-display hidden carrier profiles.

Carriers icons with green checkmarks are carrier profiles added by individual agencies because they have direct appointments with the carriers.

Carriers with the blue checkmarks are profiles the agency "borrows" from the main RPS agent account. RPS has the carrier appointment and the agency is using that appointment to receive quotes.

The carriers with red exclamation points are invalid. This means the carrier profile is in error and requires attention from the website administrator.

Reports

Reports can only be run by your agency's primary user (usually the principal of the agency).

Commissions

For the **Standard Lines Direct Deposit/Wire Transfer** form, hover over the **Commissions** tab and click **Direct Deposit Form**. Follow the instructions on the form to allow payments to auto-deposit.

## Carrier Availability & Licensing

There are two options when hovering over the **Carrier Availability & Licensing** tab: **Carrier Availability by State** and **Please Contact RPS**.

To view carrier appetite by state, click **Carrier Availability by State**. The map is available for both Commercial and Personal Lines.

To use the map appropriately, first ensure the proper line is selected: **Personal Lines** or **Commercial Lines**. Then click the appropriate state.


Click a carrier icon/name for recent news. To convert this view to a table, click **View Appetite by LOB** *(pictured below)*. Click **Return to Map** or **Carrier Availability Map** to go back to the map view.

Personal Lines Carrier Availability for Illinois

Mercury	X							X					
MetLife	X		X	X				X	X				
Personal Umbrella													
Risk Placement Services	X	X	X	X	X	X	X	X	X	X	X		X
State Auto	X							X		X			
Swyfft								X					
Travelers	X	X		X		X	X	X	X		X		
USLI									X	X		X	
Vacant Express												X	
Wright Flood													

Submit a New Personal Lines Application   Carrier Availability Map

Tools/Help

The **Tools/Help** options offer additional support with information and forms. The links within this section usually open PDF documents. Many of these documents must be printed to be used effectively.

The **Tools/Help** dropdown provides the following options:	
Forms	Click **Forms** to access ACORD forms and info-gathering forms for online applications.
Policy Service	Click **Policy Service** for a list of common carrier contact centers and a cancellation request.
Renewals & Requotes	Click **Renewals & Requotes** for information about requotes.
Quoting & Binding	Click **Quoting & Binding** for information about submitting a personal or commercial applications and common mistakes made when completing these applications.
Rollovers	Click **Rollovers** to consult Broker of Record (BOR) instructions and complete a BOR form. Users may also email RPS with any questions about rollovers.
Training & How To's	Click **Training & How To's** to access manuals and videos related to RPS Standard Express.
Technology	Click **Technology** when experiencing technical difficulties that require RPS intervention. This section also lists all compatible web browsers to use RPS Standard Express.