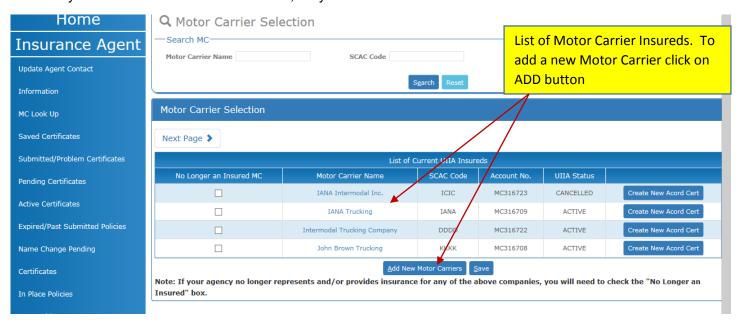


NEW ONLINE ACORD INSURANCE SUBMISSION PROCESS

Registered Agent Homepage

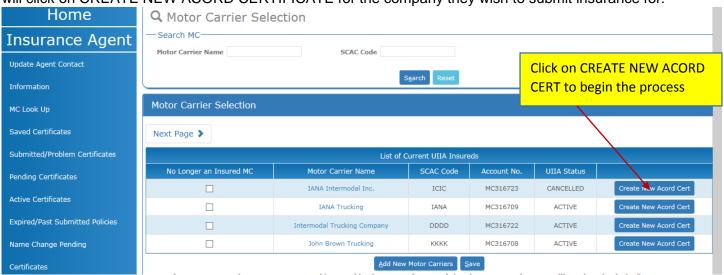
Once logged in a registered agent will see their list of current UIIA Insureds that they can submit insurance on behalf of. If they need to add a new Motor Carrier, they will click on ADD NEW MOTOR CARRIERS.



The agent will then enter the SCAC Code of the new Motor Carrier insured and the Insurance Agent Code that was assigned to the Motor Carrier. After entering this information, the agent will click on ADD. The new Motor Carrier insured will then show on the agent's list of insureds.



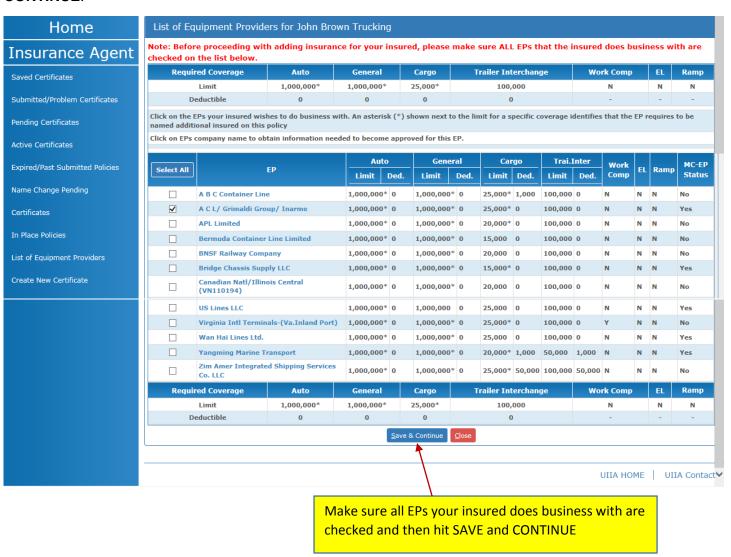
The beginning of the online insurance process is the same in that the agent from their List of UIIA Insureds screen will click on CREATE NEW ACORD CERTIFICATE for the company they wish to submit insurance for:



An instructional screen will be displayed next where the agent will click on CONTINUE:



The EP List is displayed next. The agent will need to ensure that each of the EPs that their insured does business with is checked off. These will be the companies that will need to be listed as additional insured on the Motor Carrier's insurance policies. Once EPs have been checked, scroll to the bottom of the page and click on **SAVE AND CONTINUE**.



The Policy Selection Screen is next. This is where the agent will select whether they are submitting Primary-Excess policies or EP Specific Policies. The agent will also check the boxes next to the policies they will be submitting.

Select Type of Cert - Primary/Excess or EP Sasko Agency Inc. | IA101877 SPECIFIC and then select policies that will be Select Type of Policies for John Brown Trucking submitted. Home If providing insurance policy information that pertains to one specific EP, please select EP Specific for contincate type, otherwise Primary/Excess Insurance Agent will be the default and will apply to all selected EPs. Saved Certificates Select Type Of Certificate : Primary-Excess Submitted/Problem Certificates Type of Policies Type of Policies **Employers Liability** Auto Pending Certificates General Contingent Cargo Active Certificates Cargo Ref. Trailer Trailer Interchange **Employee Dishonesty** Expired/Past Submitted Policies Work Comp Umbrella Name Change Pending Certificates Please Note: Section F.6. of the UIIA requires thirty (30) days advance notice of cancellation of the insurance policies being provided to IANA, unless cancellation is a result of non-payment of premium in which case ten (10) days advance notice is required.

The next screen will start the new online insurance submission process. The system will display to the agent an online ACORD 22 Certificate of Insurance form. The producer and contact information will be pre-populated from our database based on the agent's registration information. If this information is not up to date, the agent will be required to update their contact information prior to submitting a new insurance certificate. Agent will complete the online ACORD form as follows –

1) Enter Insurer Information based on policies being provided.

Once the policies have been selected the agent will click on **CONTINUE**.

- If the agent wishes to copy from the current INPLACE policies, it may click on COPY POLICY FROM INPLACE. The system will then ask the agent to select the policies it wishes to copy SELECT ALL will copy all policies currently inplace and submitted by the specific agent. Once selection is made click on the DONE button. The system will copy all information from the inplace policies with the exception of the EFFECTIVE and EXPIRATION DATES.
- 3) Agent should check the copied information and make sure it is still accurate and then enter the EFFECTIVE AND EXPIRATION DATES.
- 4) Please note only those policies selected on the POLICY SELECTION SCREEN will be highlighted. If there is an additional policy the agent wants to provide, it must click on BACK TO POLICY SELECTION SCREEN and select the additional policy.
- 5) If the agent is providing an Auto Liability policy, the box relating to the Truckers Uniform Intermodal Interchange Endorsement is automatically checked since this endorsement is required on all Auto policies.
- The agent will also need to provide the additional insured information if submitting an Auto, General and/or Trailer Interchange Policy. If providing additional insureds, check the second box under the DESCRIPTION OF OPERATIONS and then click on the Red Button CLICK HERE TO ADD UIIA EPS AS ADDITIONAL INSURED.
- The agent will then check whether any of the policies provide for blanket additional insured coverage by checking YES OR NO. If YES is selected, the agent will need to check the policy type the blanket coverage is provided on.
- 8) If no blanket coverage, the agent will see a list of the EPs that the insured does business with displayed based on those selected at the beginning of the process on the EP LISTING. The agent can check the type of coverage that each EP is additional insured or they can select the box at the top of each policy type to select all EPs that are listed as being additional insured on that specific policy. The system will only show a checkmark next to an EP's name if the SELECT ALL feature is used if the EP requires to be listed as additional insured on that specific policy.

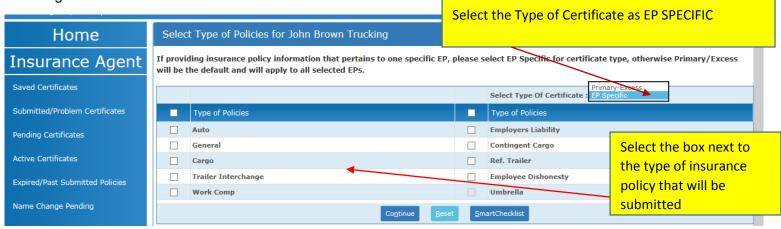
9)	Once the agent completes the certificate, it will click on SAVE & CONTINUE. The SMART CHECKLIST will be displayed to the agent to identify any issues based on the insurance submitted. If no issues are identified, the agent should click on SUBMIT CERTIFICATE. Note if issues are identified, the agent may click on BACK TO ACORD to correct the problem and then click on SAVE & CONTINUE again from the ACORD form.

SAMPLE OF ONLINE ACORD 22 FORM SHOWN ON THE NEXT PAGE

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Entering an EP SPECIFIC Policy (a certificate that includes policies for a specific EP)

Agents wishing to submit insurance coverage for a specific EP can do so from the POLICY SELECTION screen by selecting EP SPECIFIC as the TYPE OF CERTIFICATE.



The agent should select the type of policy it will be submitting (i.e. trailer interchange, cargo, etc.) from the above screen and then click on CONTINUE. Note an agent can submit more than one EP SPECIFIC policy at the same time as long as the limits for the EPs the agent is submitting the EP SPECIFIC policies for are the same.

Example:

Agent is submitting a cargo and trailer interchange policy for China Shipping Container Line and CMA-CGM (America) LLC. That lowers the deductible for both EPs on both policies to \$1,000. Agent would select EP SPECIFIC for the TYPE OF CERTIFICATE and check off CARGO and TRAILER INTERCHANGE. Then click on CONTINUE.

Agent will then enter the policy details on the ACORD 22 form. If the Equipment Providers the EP SPECIFIC policies is for require to be listed as additional insured, the agent will check the box under the description of operations relating to additional insured. Lastly, the agent will need to select EP the EP SPECIFIC policies are being submitted for and on what coverage. In the example, above the agent would select China Shipping Container Line and CMA-CGM (America) LLC for both CARGO and TRAILER INTERCHANGE.

Once this is selected the agent would click on SAVE & CONTINUE. A pop-box will appear asking you to confirm the limits will be applied to the selected EPs. Agent will click OK. The Smart Checklist will appear to identify any issues. If no issues, agent will click on SUBMIT CERTIFICATE. See screen shot below for ACORD form showing EP SPECIFIC Policies.

See Sample ACORD Form below showing CARGO AND TRAILER INTERCHANGE EP SPECIFIC POLICIES

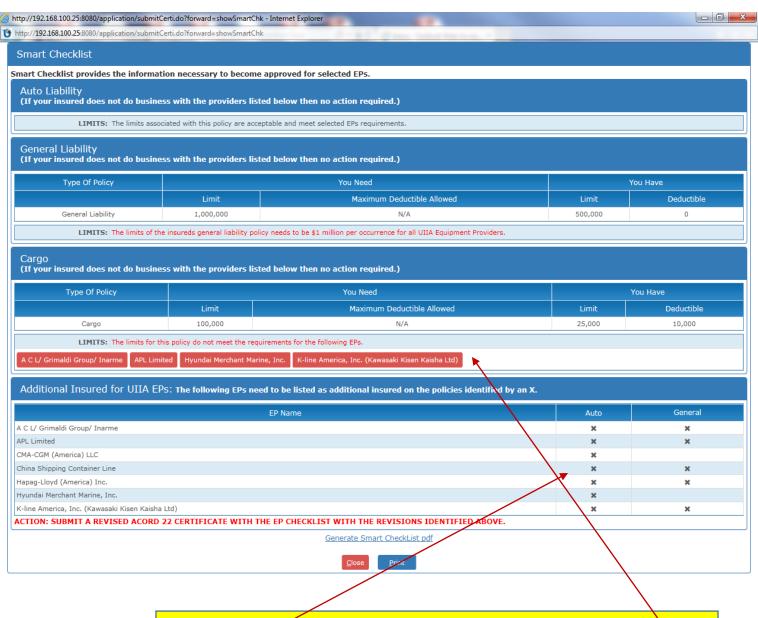
CMA for both Cargo and Trailer

interchange

Re-Designed Smart Checklist

The Smart Checklist that is generated after a certificate has been entered has been re-designed to be much easier to read. Below is a sample of the newly designed Smart Checklist. You will see that if the issue identified is related to a base requirement of the UIIA that impacts all EPs it will simply state that the problem is related to all Equipment Providers that your insured does business with. However, if the issue is specific to an individual EP, that individual EP will be shown in red.

In the example below, the general liability limit is insufficient which impacts all Equipment Providers. The cargo limit is too low, however this only impacts specific EPs which you will see listed in RED.



The new Smart Checklist identifies items that impact all EPs the insured does business with and then will separately identify in red those issues that are associated only with specific EPs. In addition, the Additional Insured information at the bottom of the page identifies EPs that need to be listed as additional insured and indicates with an "x" on what policies they need to be additional insured on.

Termination or Reinstatement of Policies

To terminate or reinstate a policy the agent will need to go to ACTIVE CERTIFICATES for the specific insured. The button next to each policy will default to TERMINATE if the policy is active. If the policy is terminated, the button will next to the policy will display REINSTATE.

To terminate or reinstate a policy, click on the TERMINATE/REINSTATE button from the ACTIVE CERTIFICATE screen.



The system will take the agent to the ACORD 22 Certificate form and the policy that you wish to terminate or reinstate will be shown in blue. Agent will enter the termination or reinstatement date and also provide a reason. The agent will then click the TERMINATE POLICY or REINSTATE POLICY button whichever is applicable.

