APPALACHIAN UNDERWRITERS, INC
BUSINESS MADE EASY

AUI PERSONAL LINES- HUDSON INSURANCE QUICK QUOTE REFERENCE GUIDE

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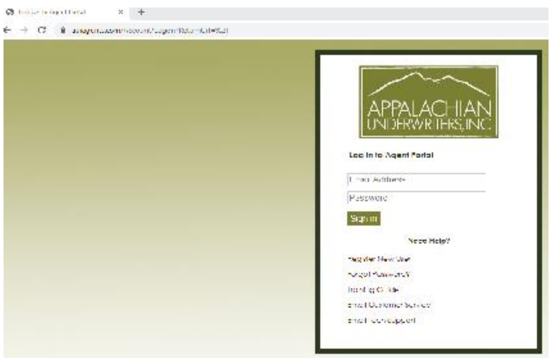
1. Overview of the Quick Quote Process

This document provides step-by-step instructions for completing a quick quote through Hudson Insurance Group's (Hudson) Policy Administration System (PAS) web portal

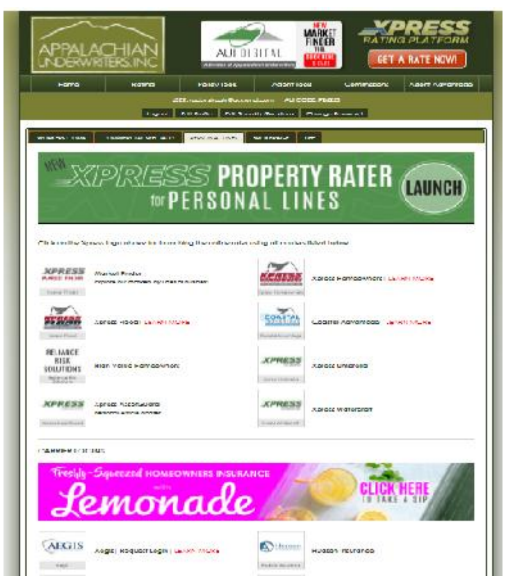
Logging In

To log in, you will need to go to the following website:
https://auiagents.com

- Enter the username and password



- Once logged into the AUI Agent Portal navigate to the Personal Lines page by clicking on the GET A RATE button on the top right of your web browser, then on the Personal Lines tab on the following page.



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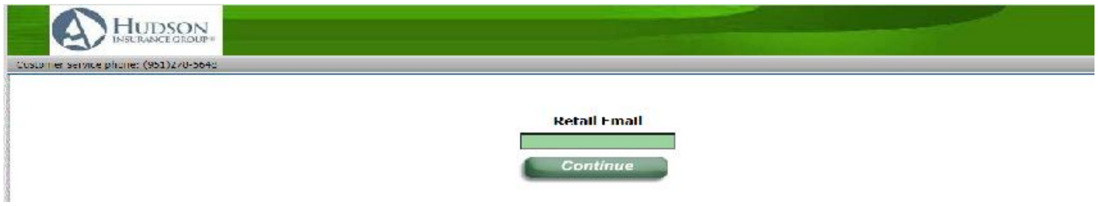
- Find the Hudson logo displayed under the “Carrier Logins” section, midway down the page.
- Click the logo to launch a new web browser for Hudson, then enter your email address.

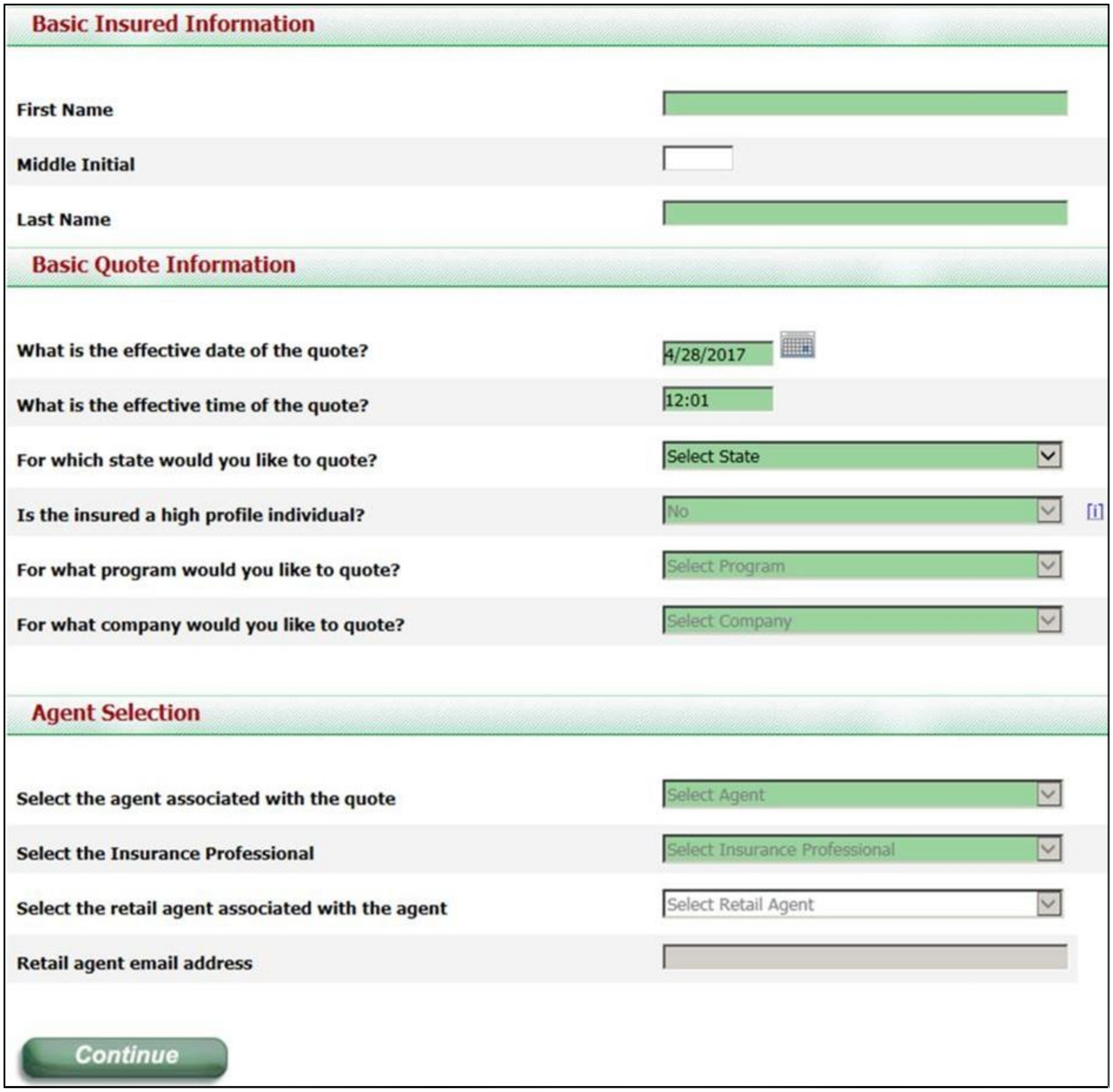


2. Creating a Quick Quote

To create a Quick Quote:

1. From the main menu click the **CREATE A QUICK QUOTE** button as circled below.

2. This opens the first screen of the **Quick Quote** wizard as shown below. Complete the mandatory (green) fields on this screen.

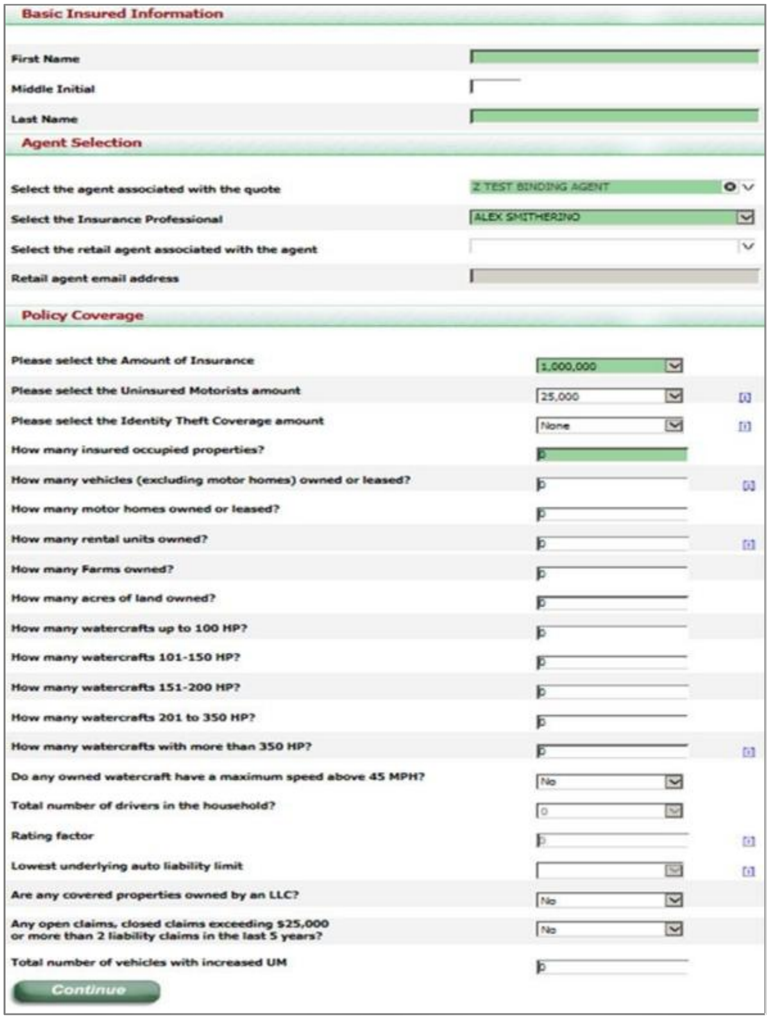


Note, certain state and product combinations will allow you to quote either admitted or non-admitted quote.

3. Click the Continue button to proceed to the next screen.

4. The Quick Quote wizard will then display as below where the **Policy Coverage** fields can be entered or selected for the risk rating information. Every product will have various fields to complete.

   Primary Umbrella Policy Coverage Fields:



5. Enter or select field inputs as applicable.
   - *Florida Risks – Underlying Home Liability of 100 CSL must be marked as low limits and quoted non-admitted only.*

6. Click the **Continue** button when you have completed your entries and selections. This generates a summary screen that displays the choices made on the prior screens.

7. **Quote Summary** screen will appear. Note the Quote and Version Number, Insured's Name, State, Company Program and Line.

QUOTE SUMMARY

Insured Name:	TEST TEST
Underwriting Contact:	Policy Underwriter
Agent:	Z TEST BINDING AGENT

Underwriting Information Summary

Quote #:	252472 v. 1
Company:	Hudson Insurance Company - Admitted
Program:	Personal Umbrella
Effective Date:	4/28/2017
Effective Time:	12:01
Insured State:	CA

Premium Calculation Detail

Coverage	Limit	Premium
Amount of Insurance	$1,000,000	Included
Uninsured/Underinsured Motorist	$25,000	Included

Taxes Fees and Surcharges

Total Policy Premium (Sum of all of the above Premiums) $0.00

Subject To

8. Scroll to the bottom of the page, then click the **Rate** button to have PAS run the quote.

A sample summary screen with call-outs is provided below.

QUOTE SUMMARY

Insured Name:	TEST TEST
Underwriting Contact:	Policy Underwriter
Agent:	Z TEST BINDING AGENT

Underwriting Information Summary

Quote #:	252472 v. 1
Company:	Hudson Insurance Company - Admitted
Program:	Personal Umbrella
Effective Date:	4/28/2017
Effective Time:	12:01
Insured State:	CA

Premium Calculation Detail

Coverage	Limit	Premium	
Amount of Insurance	$1,000,000	$235.00	
Uninsured/Underinsured Motorist	$25,000	Included	
Taxes Fees and Surcharges			
Policy Fee		$35.00	
Total Policy Premium (Sum of all of the above Premiums)			$270.00

Subject To:

Confirm that the company and policy information is correct.

In the **Subject To** fields, add notes as applicable. For example:

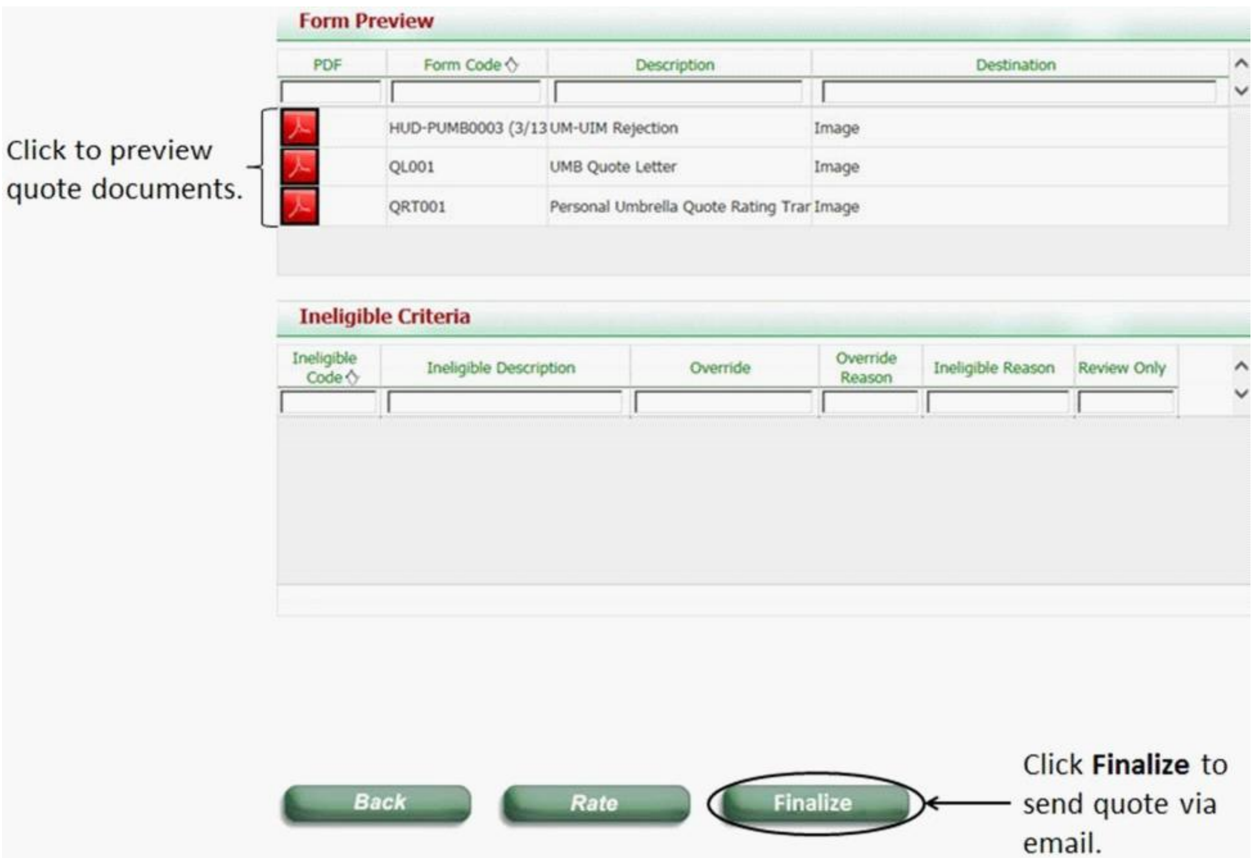
- "A signed and completed application."
- "Premises Liability Only."

9. To review the rate sheet, click on the **Rating Transcript** PDF symbol; to preview the quote, click on the **Quote Letter** PDF symbol as below. Note that the preview documents will include a 'Transaction Not Finalized' watermark as the quote is not yet finalized/executed.

10. After completing your review, either:
    - Click the **Finalize** button and the executed quote will systematically be e-mailed to the individual designated in the e-mail address field.

      OR

    - Click the **Back** button to make any revisions/updates to the coverage fields before finalizing.



Once the **Finalize** button is clicked, your quote will now be executed, and the quote will systematically be e-mailed to the individual designated in the e-mail address field. This will complete the quote process. **Important:** If you do not finalize the quote, the status of your quote will show as 'pending'.

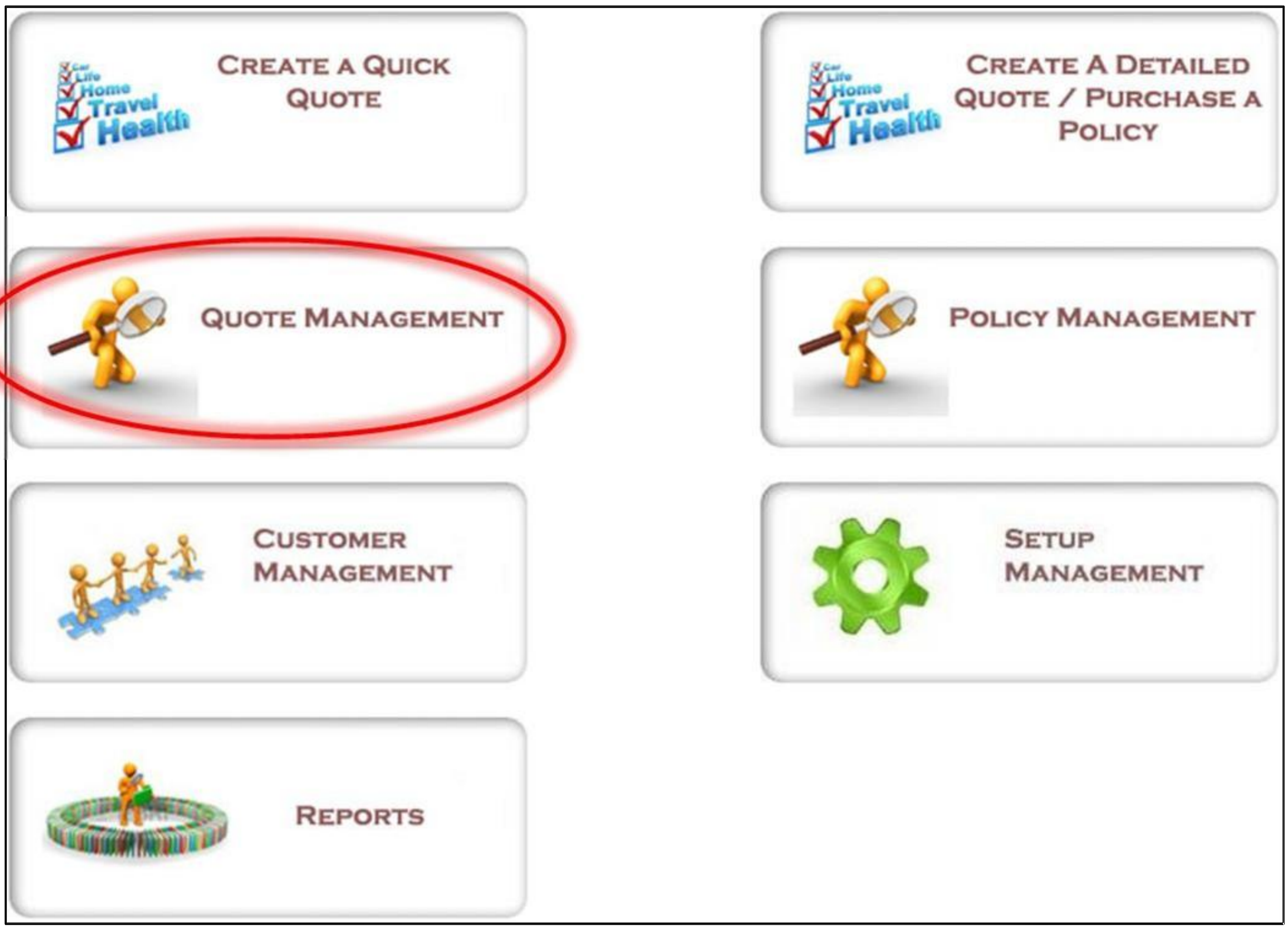
Click the Home button on the upper right corner to return to the main screen.

3. Creating a New Version of a Quote (a Re-Quote)

Sometimes, a customer may request a finalized quote to be re-quoted. The customer may wish to add or remove a scheduled item or operator from the premium estimate or change the overall amount of insurance to purchase. In such cases, you can create a new version of the initially finalized quote to make and apply the requested change(s). Hudson’s PAS tracks the quote numbering system and assigns the next version number in an ascending order (i.e. v.1, v.2, v.3, etc.) as applicable.

To create a new version of a quick quote in PAS web:

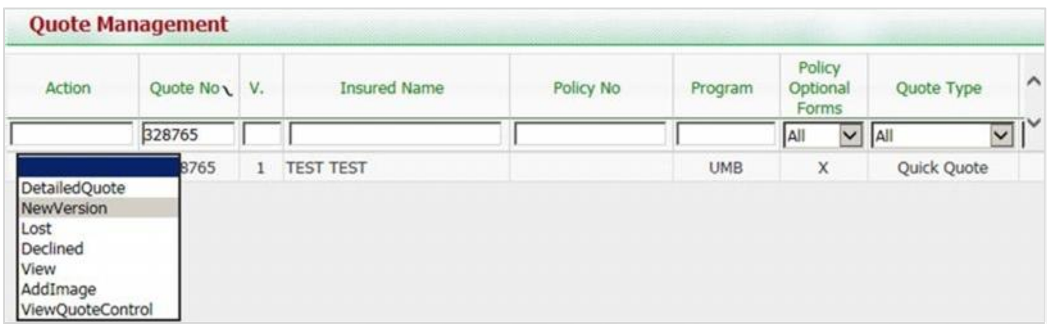
1. From the main menu click the **QUOTE MANAGEMENT** button as circled below.



2. The **Quote Management** window appears. Search for the quote by entering the quote number in the empty field labeled **Quote No** and hit <Enter>.

Note: You can also search by the Insured Name by using * as the wild card at the beginning and end of a search (i.e. to search for Smith, type *Smith* in the Insured Name field).

3. Click the **Action** dropdown for the quote to display action item options, as shown below. Choose and click **NewVersion** to edit/create a new version of the initially finalized Quick Quote.



4. The **Policy Coverage** screen appears, displaying the settings selected or entered when the initial Quick Quote was created or when the last version was made (if applicable).

5. Change policy coverage field inputs on the **Policy Coverage** screen as applicable.

6. Click the **Continue** button when you have completed the applicable changes. A new **Quote Summary** screen will appear. Once edited, your original version will be retained as Version 1 and the edited version will be 2. **Important:** If you do not finalize the revised quote, the status of your quote will show as 'pending'.

7. Click the **Rate** button at the bottom of the screen to continue.

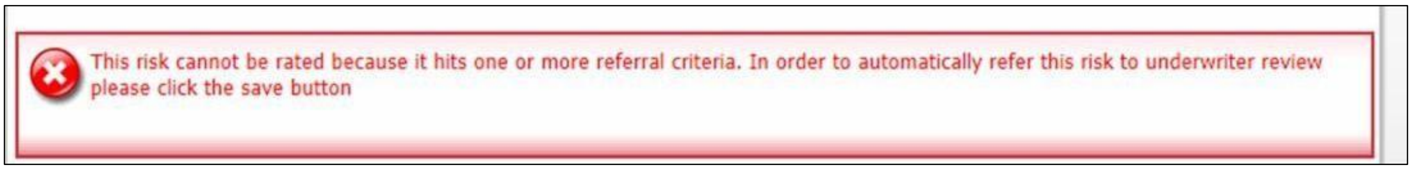
8. Click the **Finalize** button to execute the new quote version. Your revised quote will now be fully executed and the new quote will systematically be e-mailed to the individual designated in the e-mail address field. This will complete the process for creating a new version (Re-Quote) of a quote.

9. After finalizing, you may find all versions of the quote in the **Quote Management** screen. You will see the version of the quote listed next to the quote number.

4. Referral of Submission - Process

1. Quote as indicated above.

2. When you reach the Quote Summary and the risk must be submitted for approval, you will receive the message that the risk must be submitted for review and quote (as shown below).



3. Scroll to the bottom of the page and click the **Save** button.

4. An Underwriter will be notified of the referral and you will receive your quote within 24 hours.
   - If additional information is required to complete the quote, the Underwriter will contact you.