



AUI PERSONAL LINES- HUDSON INSURANCE QUICK QUOTE REFERENCE GUIDE

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1. Overview of the Quick Quote Process

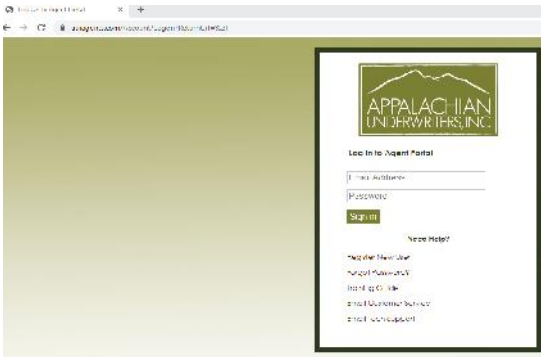
This document provides step-by-step instructions for completing a quick quote through Hudson Insurance Group's (Hudson) Policy Administration System (PAS) web portal

Logging In

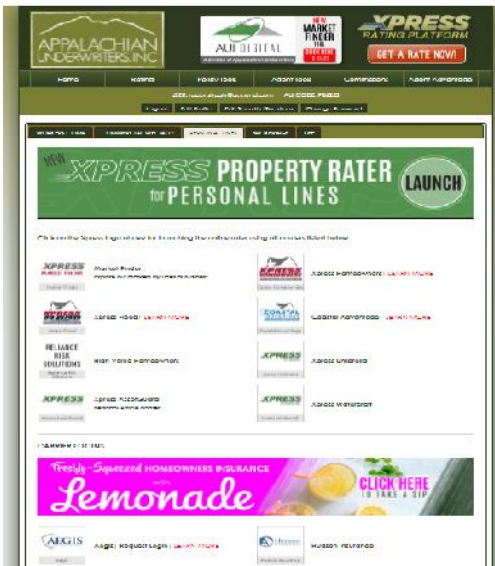
To log in, you will need to go to the following website:

<https://auiagents.com>

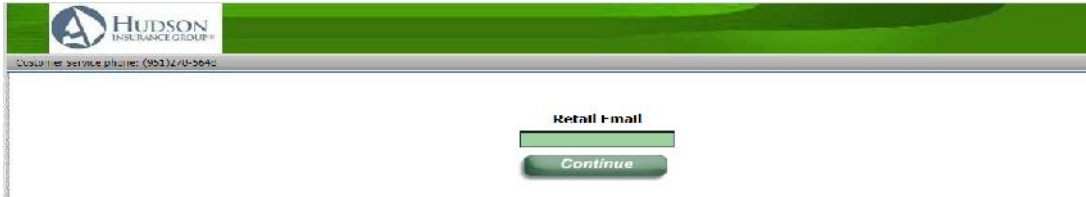
1 Enter the username and password



2 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.



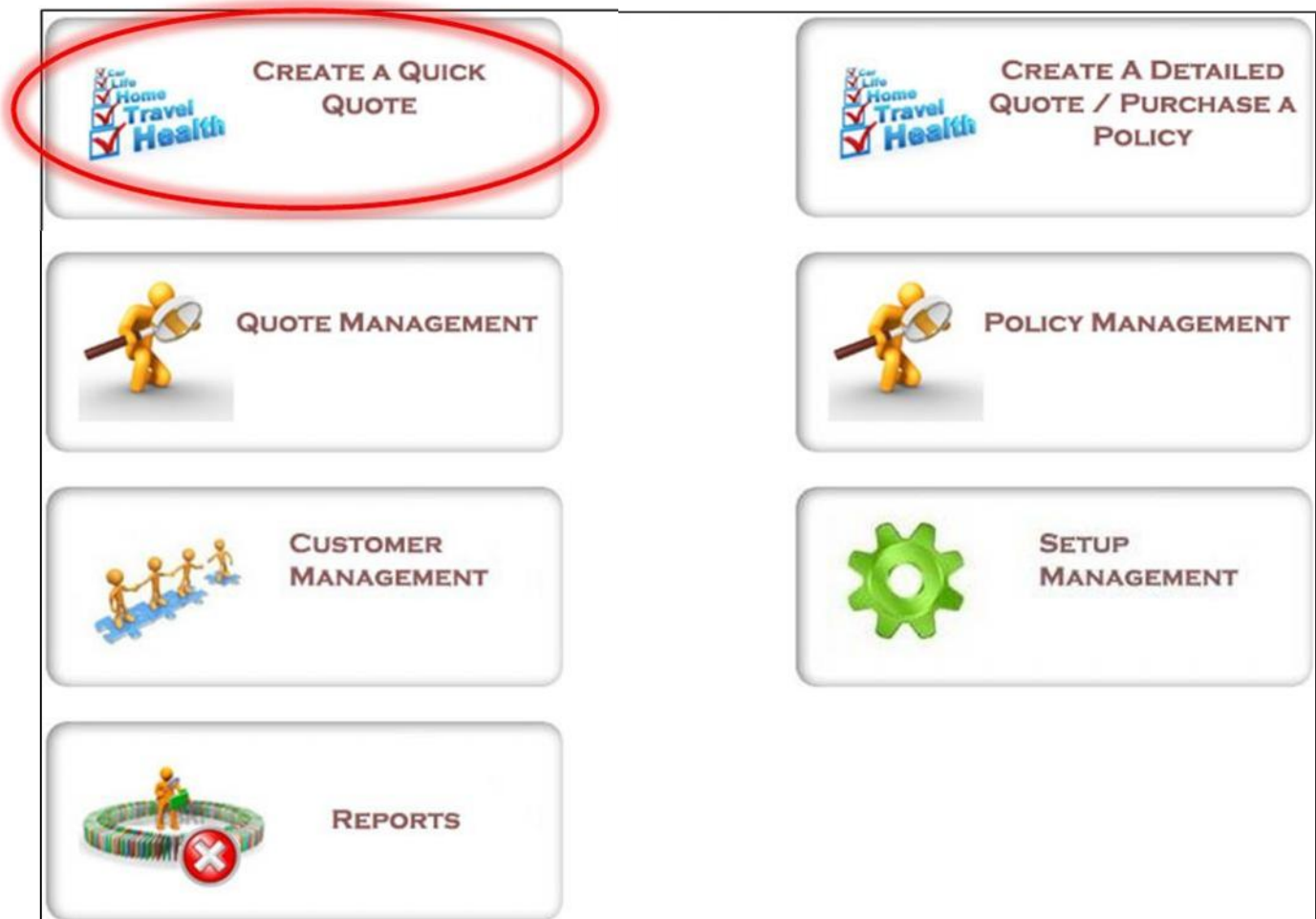
-) Find the Hudson logo displayed under the “Carrier Logins” section, midway down the page.
-) Click the logo to launch a new web browser for Hudson, then enter your email address.



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.

Basic Insured Information	
First Name	
Middle Initial	
Last Name	
Basic Quote Information	
What is the effective date of the quote?	4/28/2017 
What is the effective time of the quote?	12:01
For which state would you like to quote?	Select State
Is the insured a high profile individual?	No 
For what program would you like to quote?	Select Program
For what company would you like to quote?	Select Company
Agent Selection	
Select the agent associated with the quote	Select Agent
Select the Insurance Professional	Select Insurance Professional
Select the retail agent associated with the agent	Select Retail Agent
Retail agent email address	
Continue	

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:

Basic Insured Information	
First Name	
Middle Initial	
Last Name	
Agent Selection	
Select the agent associated with the quote	TEST BINDING AGENT
Select the Insurance Professional	ALEX SMOTHERJOW
Select the retail agent associated with the agent	
Retail agent email address	
Policy Coverage	
Please select the Amount of Insurance	1,000,000
Please select the Uninsured Motorists amount	25,000
Please select the Identity Theft Coverage amount	None
How many insured occupied properties?	0
How many vehicles (excluding motor homes) owned or leased?	0
How many motor homes owned or leased?	0
How many rental units owned?	0
How many Farms owned?	0
How many acres of land owned?	0
How many watercrafts up to 100 HP?	0
How many watercrafts 101-150 HP?	0
How many watercrafts 151-200 HP?	0
How many watercrafts 201 to 350 HP?	0
How many watercrafts with more than 350 HP?	0
Do any owned watercraft have a maximum speed above 45 MPH?	No
Total number of drivers in the household?	0
Rating factor	0
Lowest underlying auto liability limit	
Are any covered properties owned by an LLC?	No
Any open claims, closed claims exceeding \$25,000 or more than 2 liability claims in the last 5 years?	No
Total number of vehicles with increased UM	0
Continue	

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.

Click to preview quote documents.

Form Preview			
PDF	Form Code	Description	Destination
	HUD-PUMB0003	(3/13 UM-UIR Rejection	Image
	QL001	UMB Quote Letter	Image
	QRT001	Personal Umbrella Quote Rating Trar	Image

Ineligible Criteria					
Ineligible Code	Ineligible Description	Override	Override Reason	Ineligible Reason	Review Only

Back
Rate
Finalize

Click **Finalize** to send quote via email.

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'.

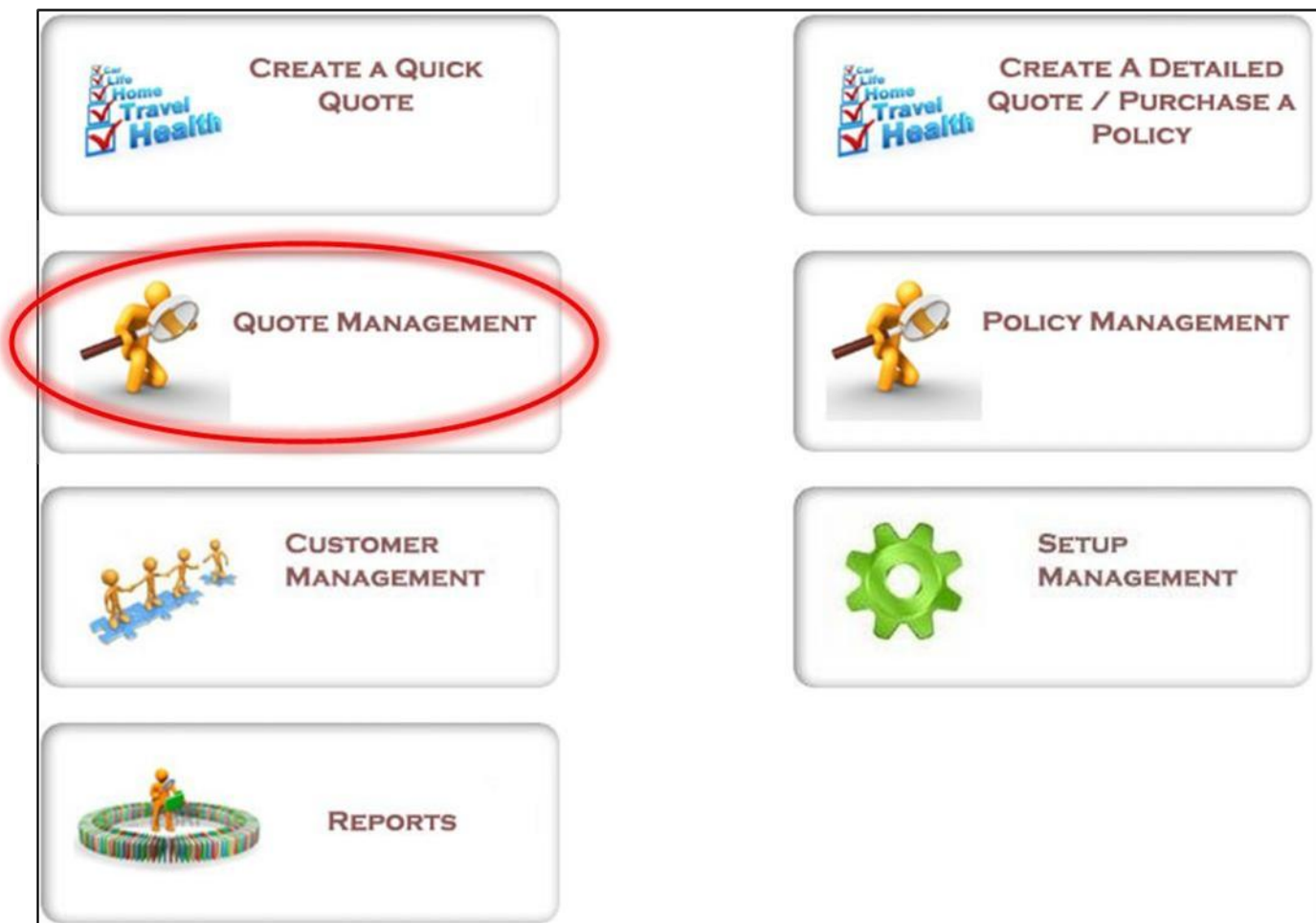
Click the **Home** button on the upper right corner to return to the main screen.

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.



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

Quote Management							
Action	Quote No \ V.	Insured Name	Policy No	Program	Policy Optional Forms	Quote Type	
	328765				All	All	
	328765	1	TEST TEST		UMB	X	Quick Quote

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).

- 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.

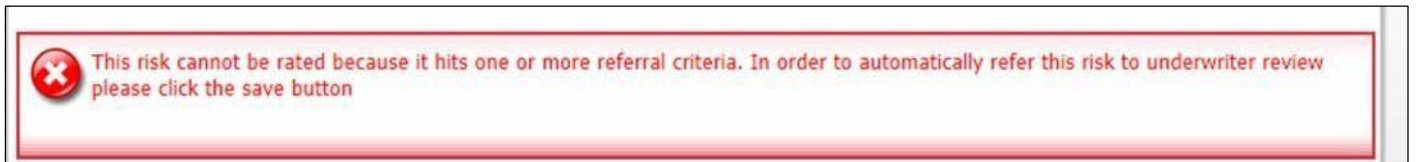
Quote Management							
Action	Quote No \ V.	Insured Name	Policy No	Program	Policy Optional Forms	Quote Type	
	328765				All	All	
	328765	1	TEST TEST		UMB	X	Quick Quote

DetailedQuote
NewVersion
 Lost
 Declined
 View
 AddImage
 ViewQuoteControl

- 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).
- Change policy coverage field inputs on the **Policy Coverage** screen as applicable.
- 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'.
- Click the **Rate** button at the bottom of the screen to continue.
- 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.
- 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.