



California

AMsuite[®] Job Aids

Coverage is subject to policy terms, conditions, limitations, exclusions, underwriting review and approval, and may not be available for all risks or in all states. Rates and discounts vary, are determined by many factors and are subject to change. Policies are written by one of the licensed insurers of American Modern Insurance Group, Inc., including American Modern Home Insurance Company d/b/a in CA American Modern Insurance Company (Lic. No 2222-8).

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Customer Service

Help with AMsuite® is a phone call away:

800-955-8213

www.jebrown.net



Manufactured Home

Occupancy: owner, rental, seasonal, vacant (via DW Basic), tenant
Home: no age limit, single family, multi-sectional, modular, tiny home
Value: \$5,000 to \$500,000

Coverage: comprehensive causes of loss – stated value settlement for total loss – ACV for partial loss – upgrade to full repair, replacement or extended replacement cost for homes 30 years of age and newer – ACV settlement for personal property, upgrade to replacement cost

Included: water damage at 100% Cov. A, theft, vandalism, loss of use, reasonable repairs, emergency removal, builders risk, ordinance or law

Options: water backup/sump overflow, water damage at 10, 25 or 50% Cov. A, personal or premises liability up to \$500,000, personal property, other structures, enhanced coverage (increases limits), earthquake, vacancy permission, trip collision, home equipment breakdown, fire dept. surcharge, occasional rental, loss assessment, ID recovery, hobby farming, golf cart

Extra: up to 30 days lapsed coverage allowed, all protection classes accepted, even 9 and 10

Homeowners – NEW

Occupancy: owner, seasonal
Home: no age limit for basic or enhanced coverage (60 year max. if adding ext. replacement cost or for row or town home), 1- to 2-family, average or better condition

Value: \$50,000 (\$75,000 if replacement or ext. replacement cost) to \$1M

Coverage: extended coverage, upg. to comprehensive – ACV, upg. to full repair, replacement or extended replacement

Included: up to \$1M for liability, personal property (can schedule and upg. to replacement cost), other structures, reasonable repairs, debris removal, loss of use

Options: water damage at 10, 25, 50, 75 or 100% Cov. A, water backup/sump overflow, enhanced coverage (adds collapse, weight of snow/ice, power surge, falling objects, glass breakage), theft at 10, 25, 50, 75 or 100% Cov. C, home equipment breakdown, service line, ID recovery, ordinance or law, hobby farming

Extra: can easily upgrade coverage to emulate HO-3

Dwelling Special

Occupancy: rental, seasonal, vacant
Home: no age limit, 1- to 4-family, above average or better condition, up to 3 stories, row homes, flat roof

Value: \$75,000 to \$1.25M

Coverage: comprehensive (all risk) coverage, replacement cost, modified functional replacement cost, extended replacement cost settlement for dwelling and other structures – named peril coverage, ACV settlement for personal property, upgrade to replacement cost

Included: water damage at 10% Cov. A, other structures, reasonable repairs, debris removal, additional living expenses/fair rental value, fire dept. surcharge

Options: water damage at 25, 50, 75 or 100% Cov. A, water backup/sump overflow, premises or personal liability up to \$1M (includes prop. mgr.), landlord personal injury, personal property (can schedule), theft (seasonal), burglary, short term or occasional rental, home equipment breakdown, service line, ID recovery, ordinance or law, roof exclusion, specific building or structure exclusion, earthquake

Dwelling Basic

Occupancy: vacant, seasonal, rental, owner, non-residence

Home: no age limit, any age roof, 1 to 4-family, fair or better condition, up to 3 stories, row homes, flat roof

Value: \$20,000 (rental, owner) or \$5,000 (vacant, seasonal, non-residence) to \$1M

Coverage: ACV, upgrade to full repair or modified functional replacement cost

Included: other structures, reasonable repairs, debris removal, fair rental value, fire dept. surcharge

Options: water damage up to \$10,000, personal or premises liability up to \$1M (includes prop. mgr.), landlord personal injury, much more

Condominium

Occupancy: owner, rental, seasonal, vacant (via DW Basic)

Home: no age limit on building, high rises, mixed use, up to 3 claims

Value: \$1,000 to \$500,000 (\$1M vacant)

Coverage: named peril, replacement cost

Included: water damage at 100% Cov. A and C, premises liability (includes prop. mgr.), loss of use, loss assessment

Options: water backup/sump overflow, personal property (upg. to replacement cost), theft while rented, short term or occasional rental, landlord personal injury, earthquake

Discounts for all residential lines: auto policy with agent, multiple policies with American Modern, no claim in past 3 years, paperless documents, pay in full, protection device or service. See program manual for details.



Motorsports

Types: cruiser, touring, dual purpose, dirt bike, super sport, electric cycle, scooter/moped, classic/vintage, custom, trike conversion, ATV/UTV, GEM, golf cart, low speed electric vehicle, neighborhood electric vehicle, Segway, snowmobile

Coverage: full coverage, comp/liability, or liability only – replacement cost settlement (for life of the bike) on bikes 2 model years or newer, agreed value for classics

Included: \$3,000 accessories (off-road to \$1,000), personal effects/safety apparel to \$1,000, pet protection, towing and emergency expense

Options: accessories upgrade to \$30,000 with replacement cost, medical payments, passenger liability, personal effects/safety apparel upgrade to \$2,500, rental reimbursement, towing and emergency expense, trailer damage, travel loss reimbursement, uninsured motorist



Collector Vehicle

Types: classic, antique, muscle, street rod, modified, replica, kit car, exotic, race car, fire engine, truck, tractor, military vehicle, vehicles under restoration

Coverage: full coverage (comprehensive, collision and liability), physical damage (comprehensive and collision), comprehensive only – agreed value loss settlement (no depreciation)

Included: full safety glass, disaster relocation, spare parts, towing and emergency expense, personal effects, pet protection, travel loss, collectors coverage

Options: appreciation of value security, automobilia, medical payments, subrogation waiver exclusion, trailer physical damage, trip coverage

Extra: title may be held by an individual, trust, LLC or corporation, drive to work



Boat

Types: bass/walleye, runabout, sport fish, performance, ski boat, sail boat, pontoon, houseboat, hovercraft, antique, wood hull, PWC – any boat less than 26 ft

Coverage: full coverage (includes hull/liability) or just liability – agreed value settlement, replacement cost or actual cash value

Included: accidental fuel spill, under/insured boaters, watersports liability, wreck removal, pet protection, no use of after-market parts

Options: hull damage (includes consequential damage, replacement for parts up to 10 years old, named storm deductible 1 to 20%, personal effects at \$2,500, towing and emergency expenses at \$250, 50% of haul out coverage at \$500, choose a deductible between 1 and 10%), boat lift, bow to stern protection, genuine parts security, diminishing deductible, professional angler, boat lift, chartered fishing guide, port risk, rental reimbursement, tournament fee reimbursement, trailer physical damage, travel loss reimbursement, bareboat rental

Extra: title may be held by an individual, trust, LLC or corporation, extensive navigation allowances



Yacht

Types: cruiser, sport fish, performance, sail boat, pontoon, houseboat 27 ft. or greater

Coverage: full coverage (includes hull, P&I) or just liability – agreed value settlement, replacement cost, or actual cash value

Included: accidental fuel spill, under/insured boaters, search and rescue, watersports liability, wreck removal, pet protection

Options: hull damage (includes consequential damage, replacement for parts up to 10 years old, named storm deductible 1 to 20%, personal effects at \$5,000, towing and emergency expenses at \$1,000, 50% of haul out coverage at \$500, \$3,000 for unscheduled dinghy, choose a deductible between 1 and 10%), boat lift, bow to stern protection, captain and crew, chartered fishing guide, diminishing deductible, extended navigation, parts replacement for parts up to 15 or 20 years old, genuine parts security, liveaboard, nautical collectibles, occasional charter, port risk, professional angler, rental reimbursement, tournament fee reimbursement, trailer physical damage, travel loss reimbursement

Extra: title may be held by an individual, trust, LLC or corporation, extensive navigation allowances including the Bahamas, Caribbean and Mexico

Discounts for all recreational lines: anti-theft devices, customer loyalty, multiple vehicles, multiple policies with American Modern, safety course completion

Quote and book via **AMSuite®**. Most prior losses, credit issue or bankruptcy are acceptable. Company will order inspection if needed. Refer to state program manual for coverage details.

Coverage is subject to policy terms, conditions, limitations, exclusions, underwriting review and approval, and may not be available for all risks or in all states. Rates and discounts vary, are determined by many factors, and are subject to change. Policies are written by American Modern Property and Casualty Insurance Company (Lic. No. 6129-1).

AMsuite® vs AMsuite® Core

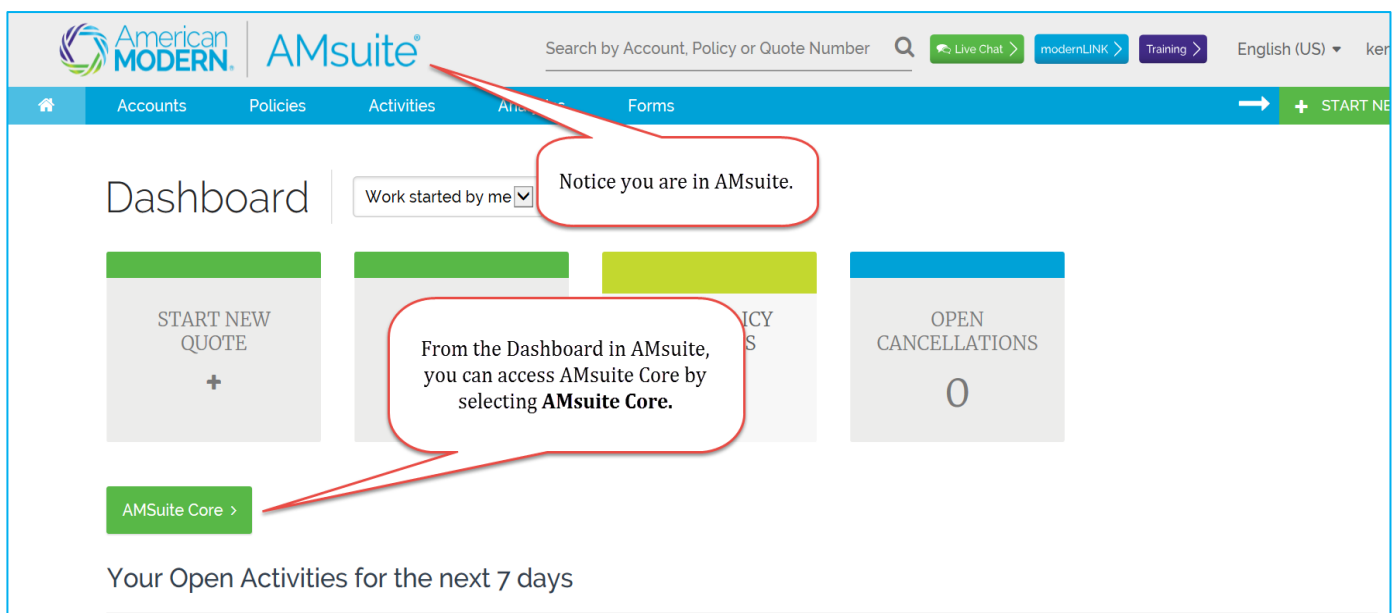
This job aid will provide step by step instructions for navigating between AMsuite® and our AMsuite® Core system. A user may have the need to access both systems depending on the type of transaction you are completing.

What is AMsuite®?

- AMsuite® is American Modern Insurance Group's policy administration system. AMsuite® is an easy to use system for your typical day to day transactions.

When do I use AMsuite®?

- Quote and issuance
- Submitting risks for underwriting review (if needed)
- Most policy transactions (including changes and cancels)
- Making payments
- Viewing/uploading documentation
- Working your activities



The screenshot shows the AMsuite dashboard interface. At the top, there is a navigation bar with the American MODERN logo, the AMsuite logo, a search bar, and links for Live Chat, modernLINK, and Training. Below the navigation bar, there are tabs for Accounts, Policies, Activities, and Forms. The main content area features a 'Dashboard' section with a dropdown menu for 'Work started by me'. There are four main action tiles: 'START NEW QUOTE', 'POLICY S', and 'OPEN CANCELLATIONS'. A green button labeled 'AMSuite Core >' is located at the bottom left of the dashboard. Two callout boxes with red borders and arrows point to the 'AMSuite Core >' button and the 'POLICY S' tile. The first callout says 'Notice you are in AMsuite.' and the second callout says 'From the Dashboard in AMsuite, you can access AMsuite Core by selecting **AMsuite Core**.'

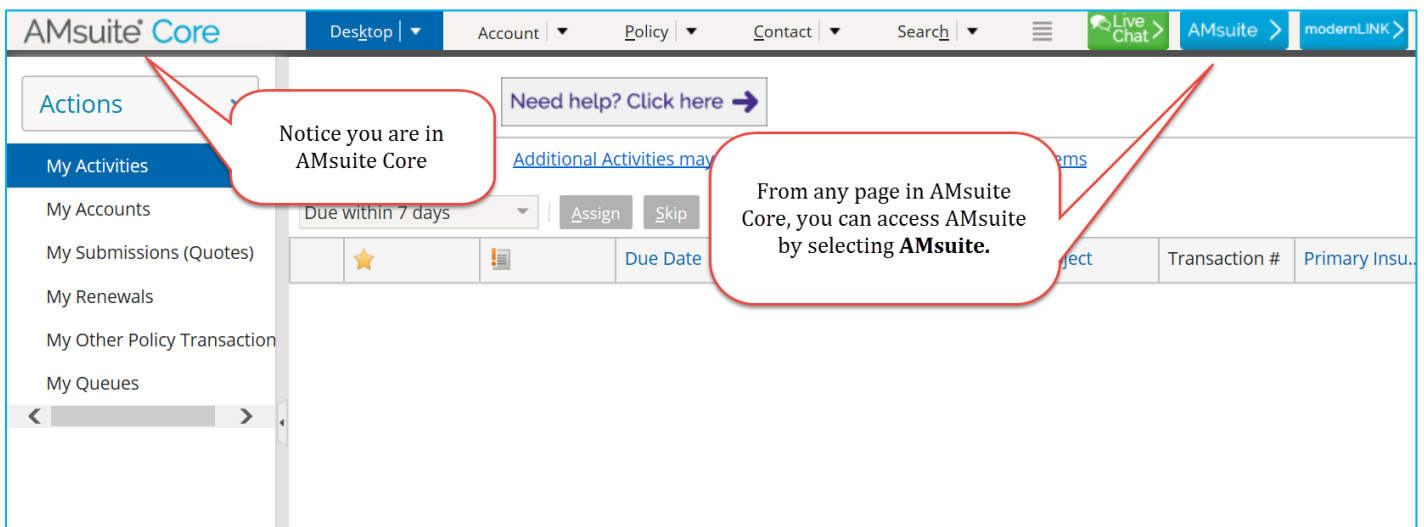
AMsuite® vs AMsuite® Core

What is AMsuite® Core?

- AMsuite® Core is American Modern Insurance Group's comprehensive policy system that will allow for more advanced policy transactions.

When do I use AMsuite® Core?

- Copying your Submission
- Rewriting a policy
- Side by Side Quoting
- Viewing detailed billing history
- Performing underwriting transactions (for users with underwriting authority)
- Policy servicing during a pending renewal.



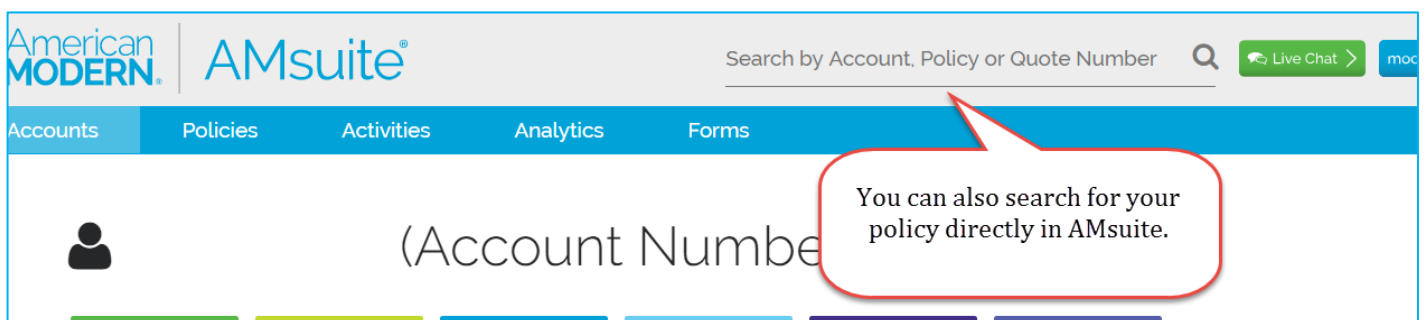
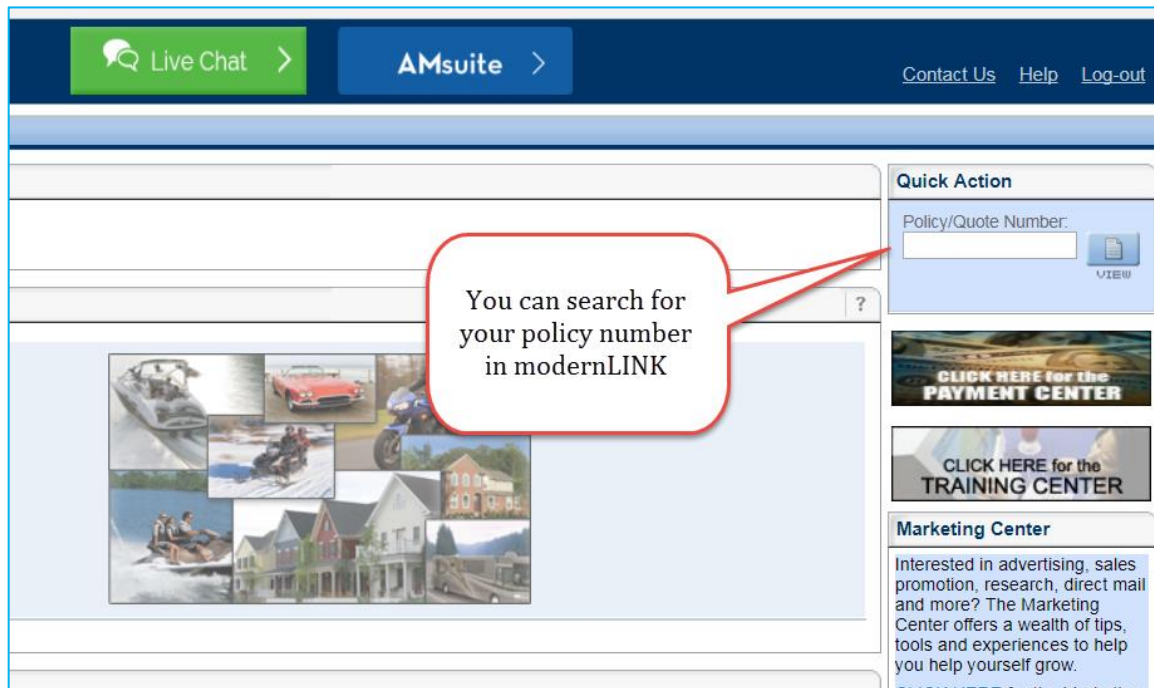
For questions about using AMsuite, please contact American Modern's Customer Service Team.

TAB:

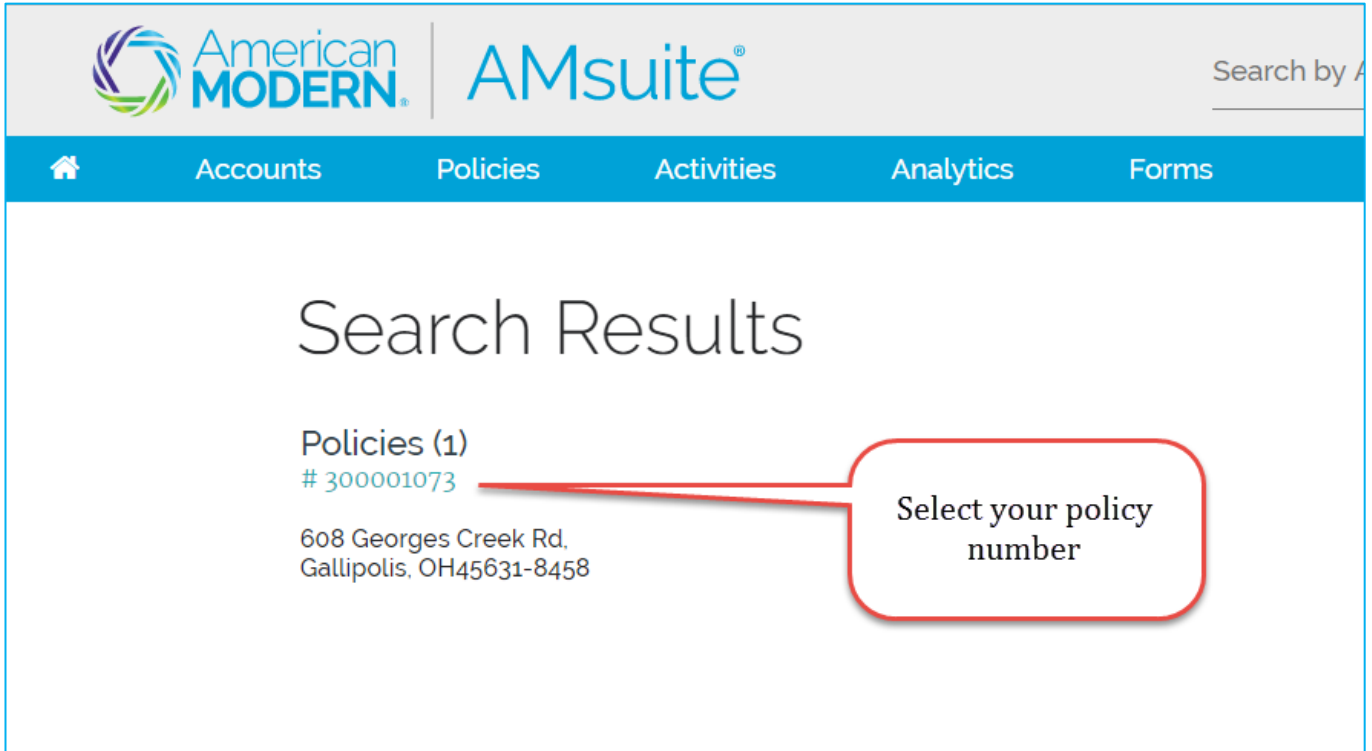
Policy Changes

Policy changes

This job aid will provide step by step instructions for completing a policy change in the AMsuite system.



Policy Changes



American MODERN | AMsuite®

Search by A

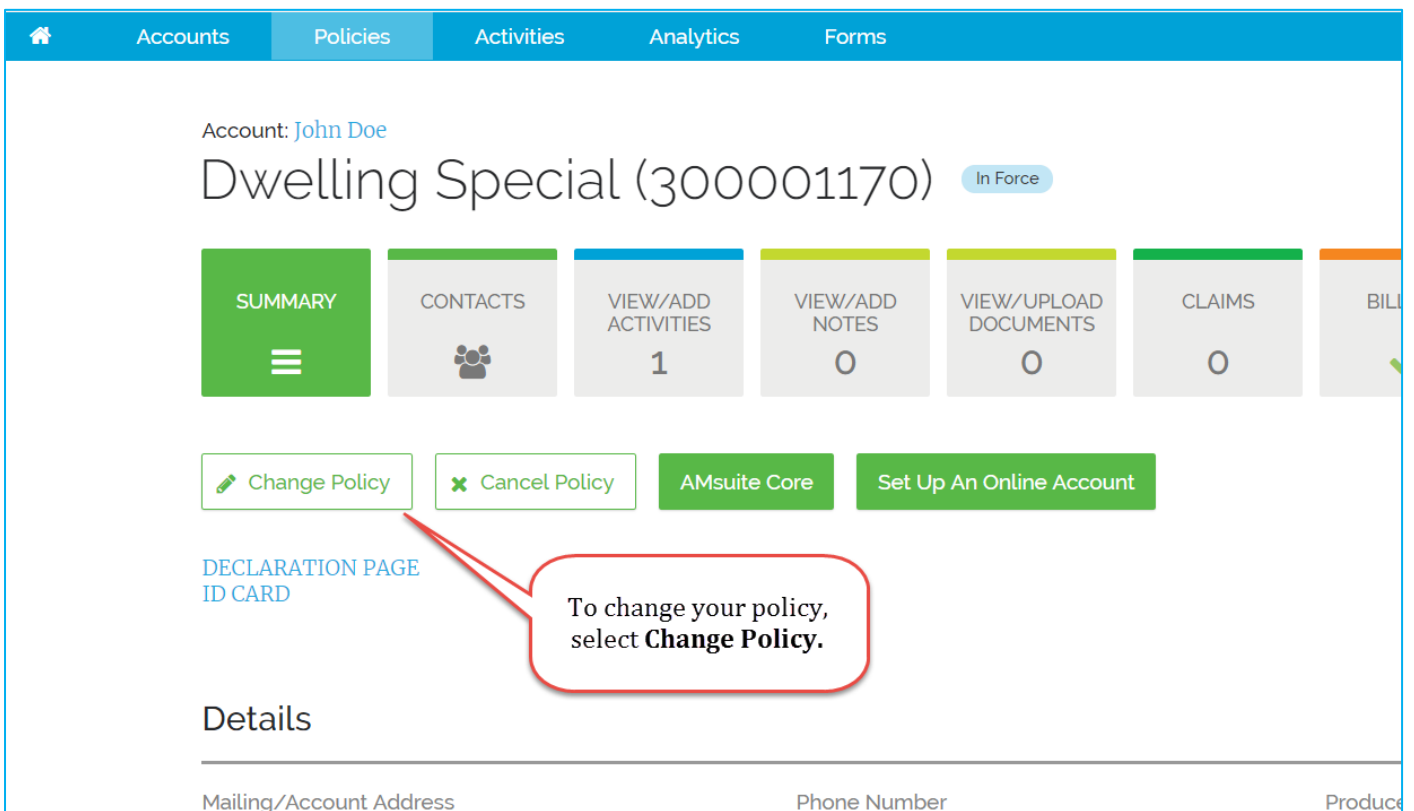
Home Accounts Policies Activities Analytics Forms

Search Results

Policies (1)
300001073

608 Georges Creek Rd.
Gallipolis, OH45631-8458

Select your policy number



Home Accounts Policies Activities Analytics Forms

Account: John Doe

Dwelling Special (300001170) In Force

SUMMARY	CONTACTS	VIEW/ADD ACTIVITIES 1	VIEW/ADD NOTES 0	VIEW/UPLOAD DOCUMENTS 0	CLAIMS 0	BILL
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Change Policy Cancel Policy AMsuite Core Set Up An Online Account

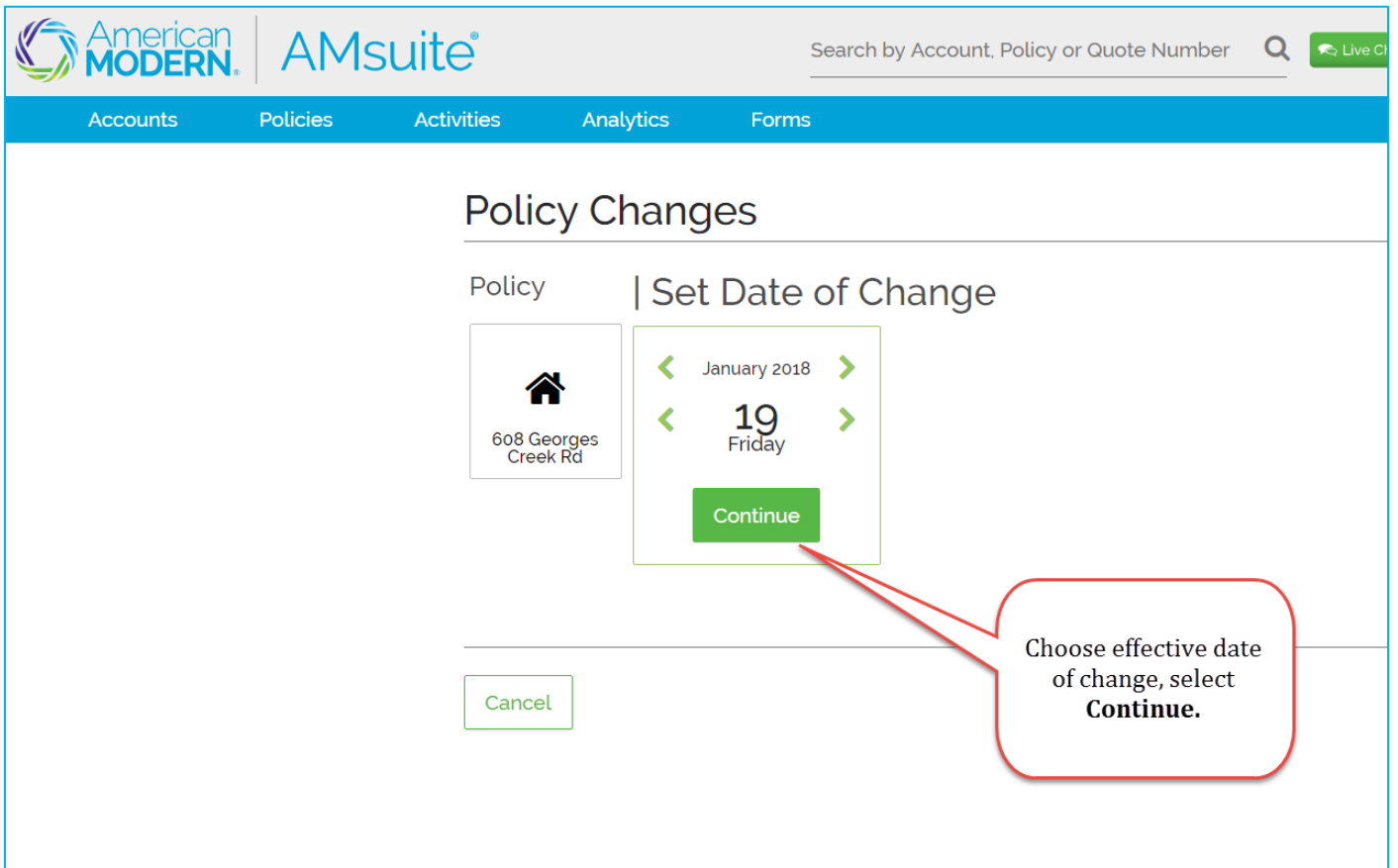
DECLARATION PAGE
ID CARD

To change your policy, select **Change Policy**.

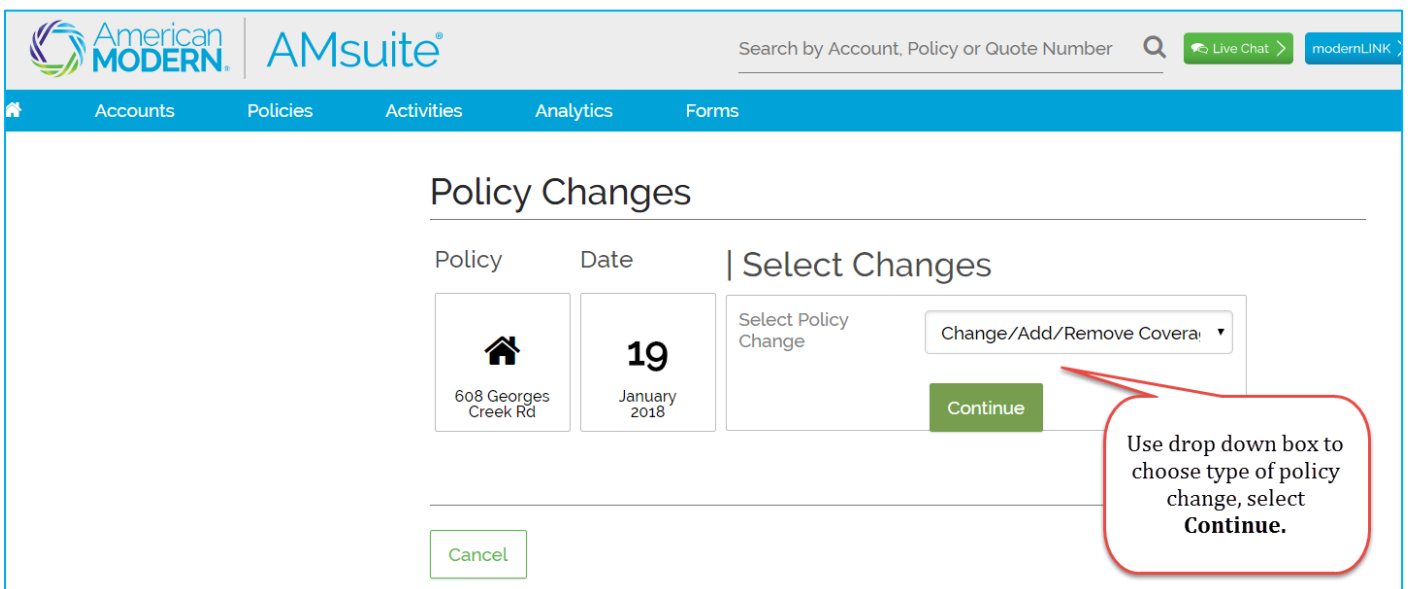
Details

Mailing/Account Address Phone Number Produce

Policy Changes



The screenshot shows the 'Set Date of Change' step in the AMsuite interface. The top navigation bar includes 'Accounts', 'Policies', 'Activities', 'Analytics', and 'Forms'. A search bar is located on the right. The main content area is titled 'Policy Changes' and features a 'Policy' section with a house icon and the address '608 Georges Creek Rd'. To the right, a date selector shows 'January 2018' and '19 Friday'. A green 'Continue' button is highlighted with a red callout box that says: 'Choose effective date of change, select **Continue.**' A 'Cancel' button is visible at the bottom left.



The screenshot shows the 'Select Changes' step in the AMsuite interface. The top navigation bar is the same as the previous screen. The main content area is titled 'Policy Changes' and features a 'Policy' section with a house icon and the address '608 Georges Creek Rd'. To the right, a 'Date' section shows '19 January 2018'. The 'Select Changes' section includes a dropdown menu labeled 'Change/Add/Remove Covera' and a green 'Continue' button. A red callout box points to the dropdown menu with the text: 'Use drop down box to choose type of policy change, select **Continue.**' A 'Cancel' button is visible at the bottom left.

Policy Changes

AMsuite Core Home Live Chat AMsuite modernLINK

Policy Change 0000001285 (Draft) Residential Eff. 01/19/2018 John Doe Account # 0000000557 Policy # 300001170

Policy Change 000000...

Policy Info (Step 1 of 7)

Save and Next > Save and Exit Quote Save Versions

Primary Named Insured Change To: [v]

Name John Doe

Primary Phone 555-5555

Primary Email [v]

County [v]

Address Type [v]

Address Description [v]

Official IDs

SSN ###-##-####

Policy Type Dwelling Special

Effective Date 01/19/2018

Expiration Date 01/19/2019

Rate as of Date 01/19/2018

Rating State Ohio

Producer of Record

Producer Code 999006

Generated Agent [v]

1 To complete your policy change, you will be directed to our AMsuite core system.

2 To navigate back to AMsuite at any time, select AMsuite at the top of the page.

3 To navigate through your change, you can use **Save and Next**, or click on the pages on the left to go directly to that page.

Policy Change 000000...

Policy Contract

Policy Info

Dwelling

Dwelling Construction

Coverages

CLUE Results

Risk Analysis

Policy Review

Quote

Forms

Payment & Signatures

Notes (0)

Dwelling (Step 2 of 7)

< Back Save and Next > Save and Exit Quote Save Versions Withdraw Transaction

Create Dwelling Remove Dwelling

<input type="checkbox"/>	Dwelling # ↑	Address	Residence Type
<input type="checkbox"/>	1	5439 Oak Ridge Dr, Will...	Primary Residence

Details Protection Details Underwriting Additional Interests

Dwelling # 1

Change To: [v]

5439 Oak Ridge Dr
Willoughby, OH 44094-3139

Get Territory Details

1

County [v]

1 **Dwelling Page**
You can add or remove dwellings on this page. If you need to add, select **Create Dwelling**.

2 Note: There are additional tabs on this page that will need to be completed.

Some information on this page has and may have changed from previous information on this page needs to be as "read-only" on this page, please make the changes there. Then click

Policy Changes

Policy Change 0000001285 (Draft) Residential Eff. 01/19/2018 John Doe Account # 0000000557 Policy # 300001170

Policy Change 00000...

- Policy Contract
 - Policy Info
 - Dwelling
 - Dwelling Construction
 - Coverages**
 - CLUE Results
 - Risk Analysis
 - Policy Review
 - Quote
 - Forms
 - Payment & Signatures
 - Notes (0)
 - Documents (50)
 - Participants
 - Activities (0 open)
 - Edit Effective Date
 - History

Coverages (Step 4 of 7) [Need help? Click here →](#)

< Back Save and Next > Save and Exit Quote Save Versions Withdraw Transaction

Coverages that apply to all dwellings

Dwelling # ↑	Limit	Address	Occupancy
1	\$221,480.00	5439 Oak Ridge Dr, Will...	1 Family Residence Rental

Dwelling at 5439 Oak Ridge Dr, Willoughby, OH 44094-3139

Coverage Details Exclusions

Property Dwelling Limit: \$300,000.00
 Settlement Cost: [Dropdown]
 All Other Deductible: \$500
 Other Structures Limit: \$22,148
 Settlement Option: Replacement Cost

Liability Coverages

- Premises Liability

Additional Coverages

- Residence Burglary
- Ordinance or Law
- Equipment Breakdown
- Service Line

Coverage Page
Select coverage you wish to change. When complete, select **Quote**.

You can also add notes, activities, upload documents, or edit the effective date

Residential Eff. 01/19/2018 John Doe Account # 0000000557 Policy # 300001170

Next > Home Edit Policy Transaction Versions Issue Policy Withdraw Transaction

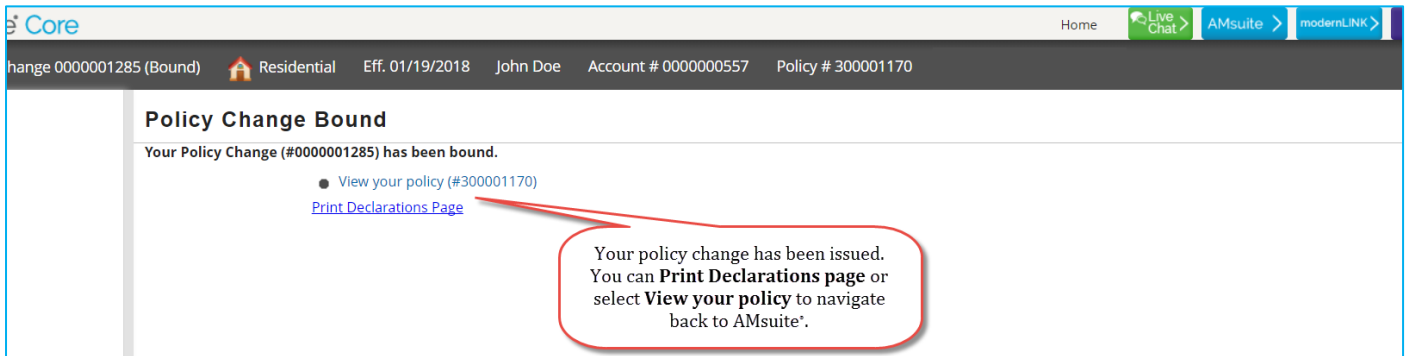
300001170	Transaction Effective Date	01/19/2018
01/19/2018 - 01/19/2019	Transaction Description	Change/Add/Remove Coverage
John Doe	Total Premium	\$732.00
608 Georges Creek Rd Gallipolis, OH 45631-8458	Total Additional Costs	-
Home	Total Cost	\$732.00
	Change in Cost	\$30.00

Your change in premium is on the right hand side of the page. To issue your policy change, select **Issue Policy.**

Cost Change Detail Discounts Applied

ing Special

Policy Changes



Core Home Live Chat AMsuite modernLINK

change 0000001285 (Bound) Residential Eff. 01/19/2018 John Doe Account # 0000000557 Policy # 300001170

Policy Change Bound

Your Policy Change (#0000001285) has been bound.

- View your policy (#300001170)

[Print Declarations Page](#)

Your policy change has been issued. You can **Print Declarations page** or select **View your policy** to navigate back to AMsuite.

For questions about using AMsuite, please contact American Modern's Customer Service Team.

Policy changes

Changing the Billing Contact

Account: Dwelling Basic (600005343) In Force

[SUMMARY](#) | [CONTACTS](#) | [VIEW/ADD ACTIVITIES](#) (4) | [VIEW/ADD NOTES](#) (0) | [VIEW/UPLOAD DOCUMENTS](#) | [BILLING / MAKE PAYMENT](#) (✓)

[Change Policy](#) | [Cancel Policy](#) | [>AMsuite Core](#) | [Set Up An Online Account](#)

DECLARATION PAGE

Click on "Change Policy" to begin a Policy Change Request

Details

Mailing/Account Address	Phone Number	Producer of Record	Total Premium	\$1,223.00
14068 Adventure Lane, Cincinnati, OH 45242	5139476596	External (009539)	Taxes and Fees	\$0.00

Policy Changes

Policy | Set Date of Change

14068 Adventure Lane

Use the arrows to select the effective date of the Policy Change
****Please Note that All Billing Changes are Effective Immediately, regardless of the date entered****

Click "Continue" to begin the Policy Change

[Cancel](#)

Policy changes

The screenshot shows the AMsuite interface for Policy Changes. The top navigation bar includes 'Accounts', 'Policies', 'Activities', 'Analytics', and 'Forms / Program Manuals'. The main content area is titled 'Policy Changes' and contains a form with three sections: 'Policy' (14068 Adventure Lane), 'Date' (8 May 2018), and 'Select Changes'. A dropdown menu is open under 'Select Changes', listing various options such as 'Change/Add/Remove Coverage', 'Change Billing/Payments' (which is highlighted in blue), and 'Other'. A red callout box points to the dropdown with the text: 'Select "Change Billing/Payments" from the drop-down list'. A 'Cancel' button is visible at the bottom left of the form.

This screenshot shows the same AMsuite interface, but the dropdown menu is closed. The 'Select Changes' field now displays 'Change Billing/Payments'. A green 'Continue' button is highlighted with a red box. A red callout box points to the 'Continue' button with the text: 'Click "Continue" to begin the Policy Change'. A 'Cancel' button is partially visible at the bottom left.

Policy changes

AMsuite Core Notice you are now in AMsuite® Core, processing a Policy Change Home Live Chat AMsuite modernLINK Training

Policy Change 0000024048 (Draft) Residential Eff. 05/08/2018 Account # 0000013390 Policy # 600005343

Policy Change 00000...

Policy Info (Step 1 of 7) Click "Quote" to continue

Save and Next > Save and Exit Quote Save Versions Withdraw Transaction

To change policy Billing or Payment details, please click "Quote" and then go to the "Payments" page.

Note that you do not need to make changes to the dwelling or coverage screens in order to change Billing or Payment details

Primary Named Insured

Name: [Redacted]
 Primary Phone: 513-947-6596
 Primary Email: none@amig.com

Policy Mailing Address

Change To: [Dropdown]
 14068 Adventure Lane
 Cincinnati, OH 45242
 County: HAMILTON
 Address Type: Home
 Address Description: [Redacted]

Official IDs

SSN: ###-##-####

Policy Details

Previous Policy Number: [Redacted]
 Term Type: Annual
 Term Number: 2
 Policy Type: Dwelling Basic
 Effective Date: 05/02/2018
 Expiration Date: 05/02/2019
 Rate as of Date: 05/08/2018
 Rating State: Ohio

Producer of Record

Producer Code: 009539
 Contracted Agency: Ken Hicks
 Producer: Ken Hicks

Producer of Service Agent Servicing

Producer Code: 009539
 Contracted Agency: Ken Hicks
 Producer: [Ken Hicks](#)

AMsuite Core Home Live Chat AMsuite

Policy Change 0000024048 (Quoted) Residential Eff. 05/08/2018 Account # 0000013390 Policy # 600005343

Policy Change 00000...

Quote

< Back Save and Next > Home Edit Policy Transaction Versions Issue Policy Withdraw Transaction

Policy Number 600005343
Policy Period 05/02/2018 - 05/02/2019
Primary Named Insured
 Address: 14068 Adventure Lane
 Cincinnati, OH 45242
 County: HAMILTON
 Address Type: Home
 Address Description: [Redacted]

Transaction Effective Date 05/08/2018
Transaction Description Change Billing/Payments
Total Premium \$1,223.00
Total Additional Costs -
Total Cost \$1,223.00
Change in Cost -

Policy Premium Cost Change Detail Discounts Applied

Policy Type Dwelling Basic

Policy Level Coverages

Description	Value	Premium
Personal Liability Cove...		\$70.00
Limit	300,000	
Damage to Property of ...	1,000	

Click "Payments & Signatures" to navigate to the billing information

Payment & Signatures

Policy changes

AMsuite Core Home Live Chat AMsuite

Policy Change 0000024048 (Quoted) Residential Eff. 05/08/2018 Account # 0000013390 Policy # 600005343

Policy Change 00000...

- Policy Contract
 - Policy Info
 - Dwelling
 - Dwelling Construction
 - Coverages
 - CLUE Results
 - Risk Analysis
 - Policy Review
 - Quote
 - Forms
 - Payment & Signatures**
 - Notes (0)
 - Documents
 - Participants
 - Activities (0 open)

Payment & Signatures

< Back Home Edit Policy Transaction Save Versions Issue Policy Withdraw Transaction

Payment

All changes made to billing and payment plan options are effective as of today's date

Premium Summary

Total Premium	\$1,223.00
Total Additional Costs	-
Total Cost	\$1,223.00
Change in Cost	-

Billing Options

Billing Method: Direct Bill

Billing Type: * Invoice

Billing Contact: Chase Home Finance LLC ISAOA

Payment Plan Options

Original Payment Plan: Pay in Full

New Payment Plan: * Pay in Full

Total cost could be significantly reduced if you choose to pay in full. You may do this by selecting "Yes" to "Paid in Full" on the Policy Info Page

Click on the drop-down next to the current Billing Contact and select the new Billing Contact from the list provided

****Please Note that only Existing Contacts may be selected; if the desired contact is not listed, they will first need to be added on the appropriate page****

AMsuite Core Home Live Chat AMsuite

Policy Change 0000024048 (Quoted) Residential Eff. 05/08/2018 Account # 0000013390 Policy # 600005343

Policy Change 00000...

- Policy Contract
 - Policy Info
 - Dwelling
 - Dwelling Construction
 - Coverages
 - CLUE Results
 - Risk Analysis
 - Policy Review
 - Quote
 - Forms
 - Payment & Signatures**
 - Notes (0)
 - Documents
 - Participants
 - Activities (0 open)
 - Edit Effective Date

Payment & Signatures

< Back Home Edit Policy Transaction Save Versions Issue Policy Withdraw Transaction

Payment

All changes made to billing and payment plan options are effective as of today's date

Premium Summary

Total Premium	\$1,223.00
Total Additional Costs	-
Total Cost	\$1,223.00
Change in Cost	-

Billing Options

Billing Method: Direct Bill

Billing Type: * Invoice

Billing Contact: Chase Home Finance LLC ISAOA

Payment Plan Options

Original Payment Plan: Pay in Full

New Payment Plan: * Pay in Full

Total cost could be significantly reduced if you choose to pay in full. You may do this by selecting "Yes" to "Paid in Full" on the Policy Info Page

Required Signature Forms

If everything is correct, click "Issue Policy" to continue

Here you can see the billing contact has been updated

Note that if the policy is billed to the lienholder, "Pay in Full" must be selected as the payment

Policy changes

AMsuite Core Home AMsuite

Policy Change 000024048 (Quoted) Residential Eff. 05/08/2018 Account # 0000013390 Policy # 600005343

Policy Change 00000...

- Policy Contract
 - Policy Info
 - Dwelling
 - Dwelling Construction
 - Coverages
 - CLUE Results
 - Risk Analysis
 - Policy Review
 - Quote
 - Forms
 - Payment & Signatures**
 - Notes (0)
 - Documents

Payment & Signatures

[< Back](#) [Home](#) [Edit Policy Transaction](#) [Save](#) [Versions](#) [Issue Policy](#) [Withdraw Transaction](#)

Payment

All changes made to billing and payment plan options are effective as of today's date

Premium Summary

Total Premium	\$1,223.00
Total Additional Costs	-
Total Cost	\$1,223.00
Change in Cost	-

Billing Options

Billing Method: Direct Bill

Billing Type: * Invoice

Billing Contact: Chase Home Finance LLC ISAOA

Payment Plan Options

Original Payment Plan: Pay in Full

New Payment Plan: * Pay in Full

Are you sure you want to issue this policy?

[OK](#) [Cancel](#)

Click "OK" to continue

AMsuite Core Home AMsuite

Policy Change 000024048 (Bound) Residential Eff. 05/08/2018 Account # 0000013390 Policy # 600005343

Policy Change Bound

Your Policy Change (#000024048) has been bound.

- Your Policy Change preempted Policy Change #000024047, view that policy transaction
- View your policy (#600005343) [Print Declarations Page](#)

Here you can see the Policy Change has been bound

Click the hyper link to view the declarations page or navigate to the Policy Summary Screen

Policy changes

Account: Dwelling Basic (600005343) In Force

Policy Contacts (2)

Contacts associated with this policy only

CONTACT	ROLES	INVOLVED WITH
CH Chase Home Finance LLC ISAOA	Billing Contact Additional Interest	1 Active Policy
DS	Primary Named Insured	3 Active Policies

Note that the Lienholder now shows the Role of Billing Contact

For questions about using AMsuite®, contact American Modern's Customer Service Team.

Policy Changes

Address Change to an Existing AMsuite® Policy

Retrieve and Open the Policy you are wanting to change from modernLINK

The screenshot shows the modernLINK interface with a navigation bar at the top containing 'Home', 'Quotes and Policies', 'Agency Management', 'eForms', 'Tools', and 'Reports'. A red arrow points to the 'Quotes and Policies' tab, labeled with a '2'. Another red arrow points to the 'Quick Action' link in the top right corner, labeled with a '1'. A central text box contains the following text:

There are a number of ways to Search for a Policy in modernLINK and AMsuite

1. Quick Action Link
2. Quotes and Policies Page

The interface also features a 'New Quote' form on the left, a 'My News' section with earthquake and wildfire reminders, and a 'Tips and Tools' section on the right.

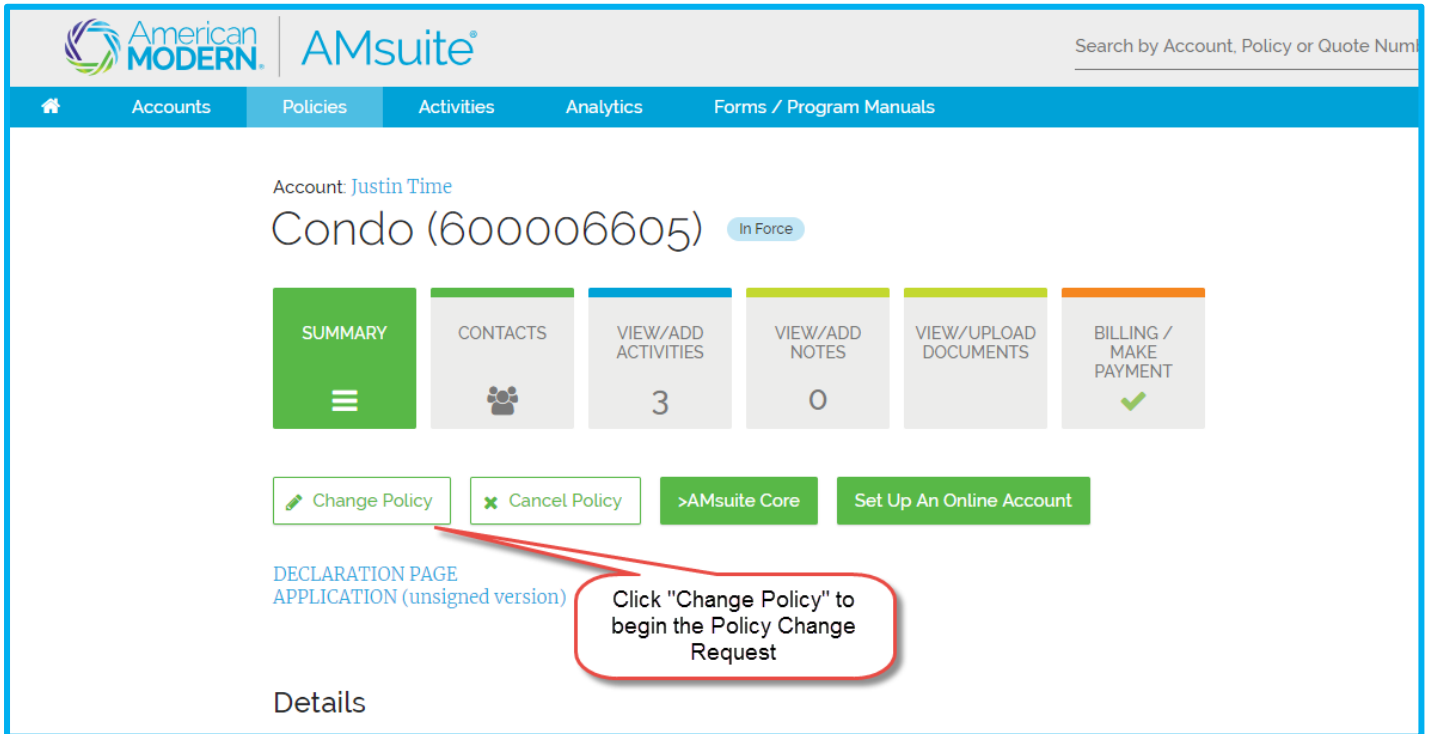
Or from within AMsuite

The screenshot shows the AMsuite interface with a navigation bar at the top containing 'Accounts', 'Policies', 'Activities', 'Analytics', and 'Forms / Program Manuals'. A red arrow points to the 'Policies' tab, labeled with a '3'. Another red arrow points to the search bar at the top right, labeled with a '4'. A central text box contains the following text:

3. Policies Page in AMsuite
4. Search bar by Quote or Policy # in AMsuite

The interface also features a 'Dashboard' section with buttons for 'START NEW QUOTE', 'OPEN QUOTES', and 'OPEN POLICY CHANGES', and a 'Your Activities for next 7 days' section below.

Policy Changes



Account: Justin Time
Condo (600006605) In Force

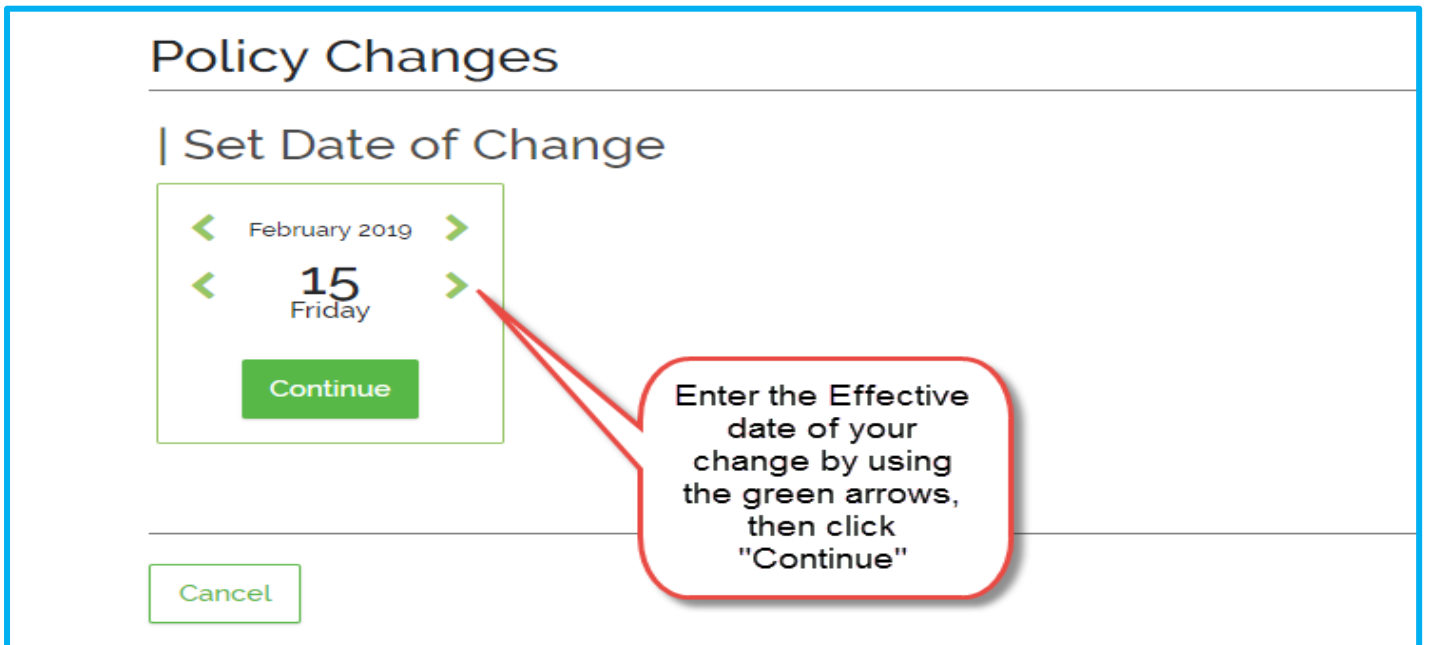
SUMMARY CONTACTS VIEW/ADD ACTIVITIES VIEW/ADD NOTES VIEW/UPLOAD DOCUMENTS BILLING / MAKE PAYMENT

Change Policy Cancel Policy >AMsuite Core Set Up An Online Account

DECLARATION PAGE APPLICATION (unsigned version)

Click "Change Policy" to begin the Policy Change Request

Details



Policy Changes

| Set Date of Change

February 2019
15 Friday
Continue

Cancel

Enter the Effective date of your change by using the green arrows, then click "Continue"

Policy Changes

Policy Changes

Date | Select Changes

15
February
2019

Change Address

Continue

Cancel

Use the drop down list to select the appropriate type of change. In this case - "Change Address"

Policy Changes

Date | Select Changes

15
February
2019

Change Address

Continue

Cancel

Click Continue

Policy Changes

Policy Change 0000030410 (Draft)

You can see that you are now creating a Policy Change in AMsuite Core

Primary Named Insured Change To:

Name: Justin Time
 Primary Phone: 888-888-8888
 Primary Email: none@amig.com

Policy Mailing Address Change To:

100 E Main St
 Amelia, OH 45102-1918

County: Clermont
 Address Type: Home
 Address Description:

Official IDs

SSN: ###-##-####

Policy Details

Previous Policy Number	
Term Type	Annual
Term Number	1
Policy Type	Condo
Effective Date	02/14/2019
Expiration Date	02/14/2020
Rate as of Date	02/15/2019
Rating State	Ohio

Producer of Record

Producer Code	009539
Contracted Agency	Ken Hicks
Producer	Ken Hicks

Producer of Service

Producer Code	009539
Contracted Agency	Ken Hicks
Producer	Ken Hicks

Primary Named Insured Justin Time [Return to Policy Info](#)

Contact Detail Roles Addresses

Person

First Name: Justin
 Middle Name:
 Last Name: Time
 Suffix: <none>
 Gender: <none>
 Date of Birth: 01/01/1959
 Marital Status: <none>
 Primary Phone: Mobile
 Home Phone:
 Work Phone:
 Mobile Phone: 888-888-8888
 Fax Phone:
 Primary Email: none@amig.com
 Secondary Email:
 Relationship to Primary Insured:
Address

Country: United States
 Attention/Care of:
 Address 1: 100 E Main St
 Address 2:
 City: Amelia
 State: Ohio
 ZIP Code: 45102-1918

1 Change the Mailing Address

2 You may need to add or correct missing information that is required

3 Click Update once all required information has been entered/changed

Policy Changes

AMsuite Core Home Live Chat AMsuite >

Policy Change 0000030412 (Draft) Condo Eff. 02/15/2019 Justin Time Account # 0000015629 Policy # 600006605

Policy Change 00000...

- Policy Contract
- Policy Info**
- Dwelling
- Dwelling Construction
- Coverages
- CLUE Results
- Risk Analysis
- Policy Review
- Quote
- Forms

Policy Info (Step 1 of 7)

Save and Next > Save and Exit Quote Save Versions Withdraw Transaction

Primary Named Insured

Name: Justin Time
 Primary Phone: 888-888-8888
 Primary Email: none@amig.com

Policy Mailing Address

Change To: 1558 Turquoise Dr
 Cincinnati, OH 45255-2521
 County: Hamilton
 Address Type: Home
 Address Description:

Policy Details

Previous Policy Number
 Term Type: Annual
 Term Number: 1
 Policy Type: Condo
 Effective Date: 02/14/2019
 Expiration Date: 02/14/2020
 Rate as of Date: 02/15/2019
 Rating State: Ohio

Producer of Record

After the Update, Then Click "Quote"

AMsuite Core Home Live Chat AMsuite >

Policy Change 0000030412 (Quoted) Condo Eff. 02/15/2019 Justin Time Account # 0000015629 Policy # 600006605

Policy Change 00000...

- Policy Contract
- Policy Info
- Dwelling
- Dwelling Construction
- Coverages
- CLUE Results
- Risk Analysis
- Policy Review
- Quote**
- Forms
- Payment & Signatures
- Notes (0)
- Documents
- Participants

Quote

< Back Save and Next > Home Edit Policy Transaction Versions Issue Policy Withdraw Transaction

Policy Number 600006605
Policy Period 02/14/2019 - 02/14/2020
Primary Named Insured Justin Time
 Address: 1558 Turquoise Dr
 Cincinnati, OH 45255-2521
 County: Hamilton
 Address Type: Home
 Address Description:

Transaction Effective 02/15/2019

Click "Issue Policy" to Bind this Change

Are you sure you want to issue this policy?
 OK Cancel

A message will appear to Confirm

Policy Premium Cost Change Detail Discount

Policy Type Condo

Policy Level Coverages

Description	Value	Premium

Policy Changes

AMsuite Core Home

Policy Change 0000030412 (Bound) ← Condo Eff. 02/15/2019

Policy Change Bound

Your Policy Change (#0000030412) has been bound.

- Your Policy Change preempted Policy Change #0000030411, view that policy transaction
- Your Policy Change preempted Policy Change #0000030410, view that policy transaction
- View your policy (#600006605)

[Print Declarations Page](#)

Documentation to collect and retain:
Copy of Insured's AAA Membership card

The Change is now Bound

Navigate back to the Policy Summary Page by Clicking Here

Print the New Declaration Page Here

American MODERN AMsuite Search by Account, Policy or Quote Number

Accounts Policies Activities Analytics Forms / Program Manuals → + START

Account: Justin Time

Condo (600006605)

Once back on the Summary Page, Scroll to the bottom of the page to view the completed Policy Change Transaction

SUMMARY CONTACTS VIEW/ADD ACTIVITIES (4) VIEW/ADD NOTES (0) VIEW/UPLOAD DOCUMENTS BILLING / MAKE PAYMENT (✓)

[Change Policy](#) [Cancel Policy](#)

DECLARATION PAGE APPLICATION (unsigned version)

Details

Mailing/Account Address
Justin Time
1558 Turquoise Dr. Cincinnati, OH
45255-2521

Policy Effective Date
February 14, 2019

Previous Policy Number Cancellation Date Cancellation Reason
Producer Ken Hicks
Producer Phone
Producer E-mail sabshire@amig.com

Property

Coverages

Policy Transactions

JOB NUMBER	TRANSACTION STATUS	TYPE	PERIOD STATUS	CREATED BY	CREATED DATE	EFFECTIVE DATE	
0000030400	Bound	Policy Change	In Force	Ken Hicks	2/14/19	2/15/19	\$664.72
0000030410	Draft	Policy Change	Draft	Ken Hicks	2/15/19	2/15/19	\$0.00
0000030411	Draft	Policy Change	Draft	Ken Hicks	2/15/19	2/15/19	\$664.72

to send autodialed pre-recorded and

Policy changes

Adding a Unit on an Existing Recreational Policy

Account: Motorsports (600005317) In Force

[SUMMARY](#) | [CONTACTS](#) | [VIEW/ADD ACTIVITIES](#) (2) | [VIEW/ADD NOTES](#) (0) | [VIEW/UPLOAD DOCUMENTS](#) | [BILLING / MAKE PAYMENT](#)

[Change Policy](#) | [Cancel Policy](#) | [AMsuite Core](#) | [Set Up An Online Account](#)

DECLARATION PAGE ID CARD

Details

Mailing/Account Address	Phone Number	Producer of Record	Total Premium	\$790.00
1602 W Schaaf Rd, Cleveland, OH 44109-4672	5135555555	External (009539)	Taxes and Fees	\$0.00

Callout: Click "Change Policy" to begin the Policy Change Request

Policy Changes

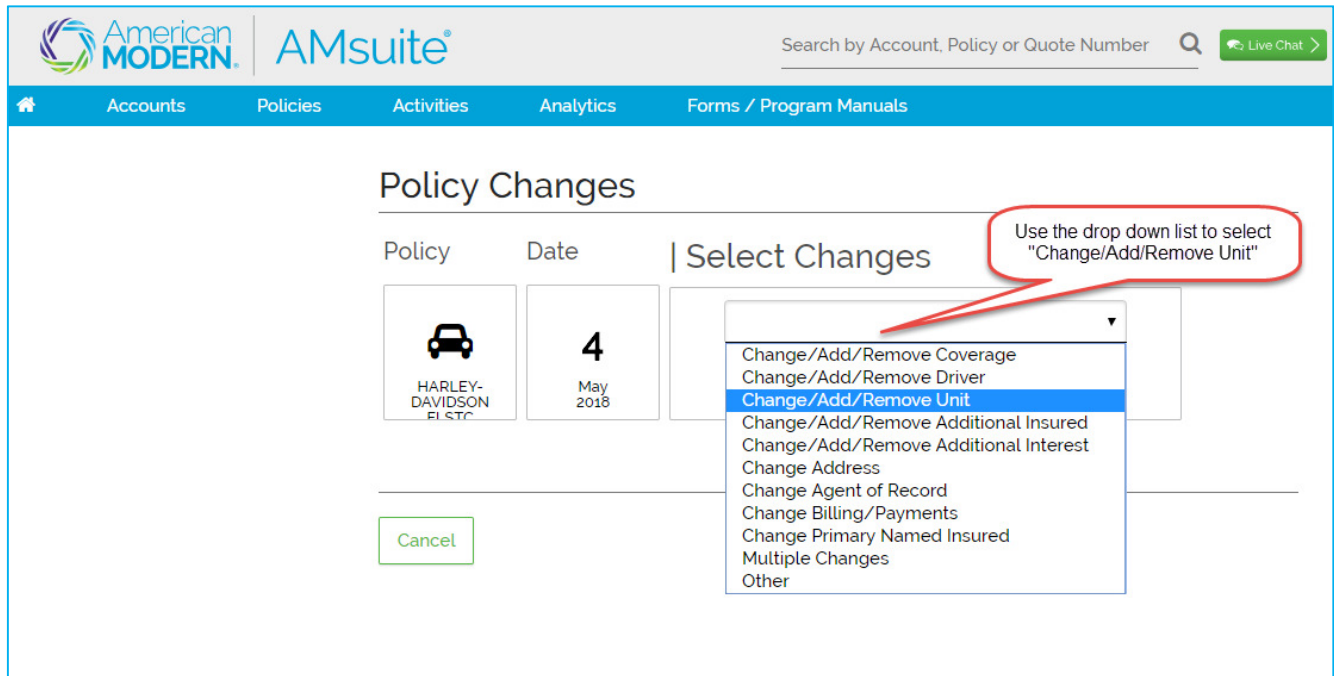
Policy | Set Date of Change

May 2018
 4 Friday
[Continue](#)

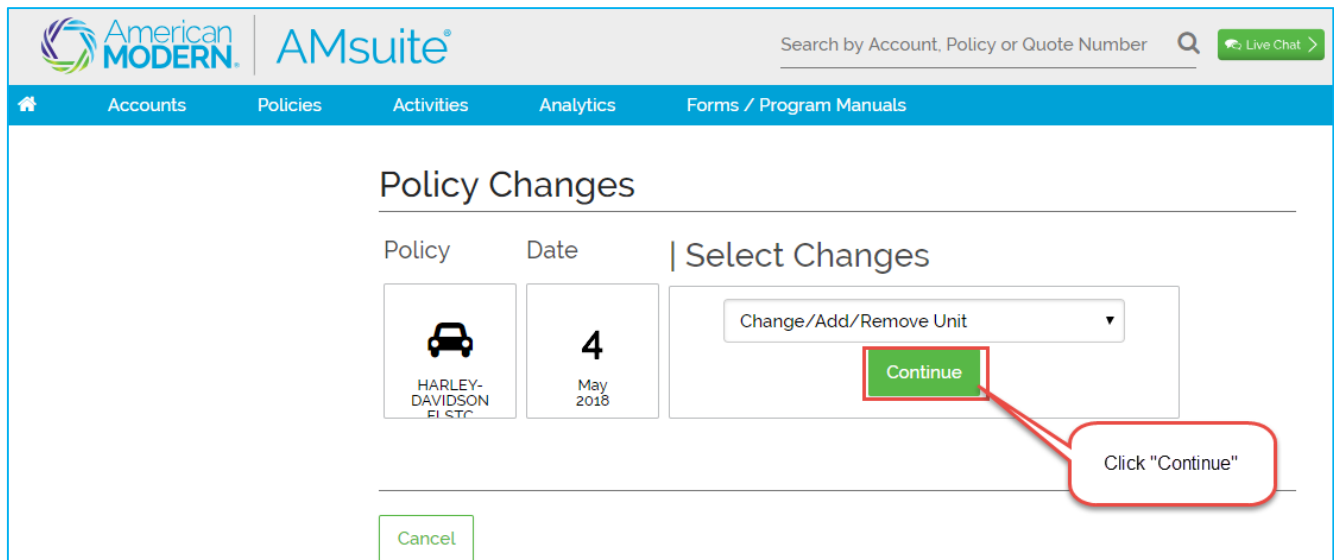
[Cancel](#)

Callout: Use the arrows to select the effective date for the addition of the new unit, then click "Continue"

Policy changes



The screenshot shows the AMsuite interface for making policy changes. The header includes the American MODERN logo, the AMsuite name, a search bar, and a Live Chat button. A navigation bar contains links for Accounts, Policies, Activities, Analytics, and Forms / Program Manuals. The main content area is titled "Policy Changes" and displays a table with columns for Policy, Date, and Select Changes. The Policy column shows a car icon and "HARLEY-DAVIDSON FL STC". The Date column shows "4" and "May 2018". The Select Changes column has a dropdown menu open, listing various options: Change/Add/Remove Coverage, Change/Add/Remove Driver, Change/Add/Remove Unit (highlighted in blue), Change/Add/Remove Additional Insured, Change/Add/Remove Additional Interest, Change Address, Change Agent of Record, Change Billing/Payments, Change Primary Named Insured, Multiple Changes, and Other. A red callout bubble points to the dropdown menu with the text "Use the drop down list to select 'Change/Add/Remove Unit'". A "Cancel" button is located at the bottom left of the form.



This screenshot shows the same AMsuite interface as the previous one, but the dropdown menu is closed. The "Select Changes" column now displays "Change/Add/Remove Unit" with a downward arrow. A green "Continue" button is highlighted with a red box, and a red callout bubble points to it with the text "Click 'Continue'". The "Cancel" button remains at the bottom left.

Policy changes

AMsuite Core Notice you are now in AMsuite® Core Home Live Chat AMsuite modernLINK

Policy Change 0000023976 (Draft) Recreational Eff. 05/04/2018 David Kessinger Account # 0000013350 Policy # 600005317

Policy Change 00000... Policy Info (Step 1 of 7) Here you can see that you are processing a Policy Change

Save and Next > Save and Exit Quote Save Versions Withdraw Transaction

Primary Named Insured Change To:

Name David Kessinger **Click "Vehicles" to go to the Unit Page**

Primary Phone 513-555-5555

Primary Email david@email.com

Policy Mailing Address Change To:

1602 W Schaaf Rd
Cleveland, OH 44109-4672

County Cuyahoga

Address Type Home

Address Description

Official IDs View Prefill Report

SSN ###-##-####

Policy Details

Previous Policy Number

Term Type Annual

Term Number 1

Policy Type Motorsports

Effective Date 04/26/2018

Expiration Date 04/26/2019

Rate as of Date 05/04/2018

Rating State Ohio

Producer of Record

Producer Code 009539

Contracted Agency Ken Hicks

Producer Ken Hicks

Producer of Service Agent Servicing

Producer Code 009539

Contracted Agency Ken Hicks

Producer [Ken Hicks](#)

AMsuite Core Home Live Chat AMsuite modernLINK

Policy Change 0000023976 (Draft) Recreational Eff. 05/04/2018 David Kessinger Account # 0000013350 Policy # 600005317

Policy Change 00000... Vehicles (Step 3 of 7) Need help? Click here →

< Back Save and Next > Save and Exit Quote Save Versions Withdraw Transaction

Vehicle Details

Create Vehicle Remove Vehicle

From Prefill Report

	Vehicle Type	Model Ye...	Make	Model	VIN/HIN/Serial #
<input type="checkbox"/>	Motorcycle				1HD1JH51X7Y...

Vehicle Details Additional Interest

Basic Vehicle Information

Vehicle # 1

Vehicle Type * Motorcycle

VIN/Serial Number 1HD1JH51X7Y123456

State Assigned VIN * Yes No

Model Year * 2007

Make * HARLEY-DAVIDSON

Model * FLSTC HERITAGE SOFTAIL CLASSIC

Classic No

Custom No

Registered for Street Use * Yes No

Registration Address Change To:

Purchase Date * 04/26/2018

Engine Size (cc) * 1584

Salvaged/Rebuilt * Yes No

Modifications - Add all that apply

Add Remove

Type

Usage - Add all that apply

Add Remove

<input type="checkbox"/>	* Type	Description
<input type="checkbox"/>	Occasional Pleasure Use	

Click on "Create Vehicle" and select the appropriate option; for an existing unit, information may be available in the Prefill Report; if the unit is a new purchase, select "New Vehicle"

Policy changes

AMsuite Core Home Live Chat AMsuite modernLINK

Policy Change 0000023976 (Draft) Recreational Eff. 05/04/2018 Account # 0000013350 Policy # 600005317

Policy Change 00000...

- Policy Contract
- Policy Info
- Drivers
- Vehicles**
- Coverages
- CLUE Results
- Risk Analysis
- Policy Review
- Quote
- Forms
- Payment & Signatures
- Notes (0)
- Documents
- Participants
- Activities (0 open)
- Edit Effective Date
- History

Basic Vehicle Information

Vehicle # 2

Vehicle Type * Motorcycle

VIN/Serial Number 1HD1PXN1XFB952705

State Assigned VIN * Yes No

Model Year * 2015

Make * HARLEY-DAVIDSON

Model * FLHXSE CVO STREET GLIDE SPECIAL

Classic No

Custom No

Registered for Street Use * Yes No

Registration Address Change To: 1602 W Schaaf Rd, Cleveland, OH 44109-4672

Storage Address Change To: 1602 W Schaaf Rd, Cleveland, OH 44109-4672

Storage County Cuyahoga

Storage Type * Locked Garage/Building/Barn

Territory Code 4

Reorder Territory Code

Vehicle Rate Modifiers

Alarm <none>

Disabling Device <none>

VIN Etching Yes No

Purchase Date * 05/04/2018

Engine Size (cc) * 1803

Salvaged/Rebuilt * Yes No

Modifications - Add all that apply

Add Remove

Type

Usage - Add all that apply

Add Remove

Type Description

Occasional Pleasure Use

Enter the Purchase Date, Engine Size and Salvage Status

Enter the Vehicle Type, VIN, and all other mandatory fields

Select Usage

Select Storage Type

AMsuite Core Home Live Chat AMsuite modernLINK

Policy Change 0000023976 (Draft) Recreational Eff. 05/04/2018 David Kessinger Account # 0000013350 Policy # 600005317

Policy Change 00000...

- Policy Contract
- Policy Info
- Drivers
- Vehicles**
- Coverages
- CLUE Results
- Risk Analysis
- Policy Review
- Quote
- Forms
- Payment & Signatures
- Notes (0)
- Documents
- Participants
- Activities (0 open)

Vehicles (Step 3 of 7) Need help? Click here →

< Back Save and Next > Save and Exit Quote Save Versions Withdraw Transaction

Vehicle Details

Create Vehicle Remove Vehicle

Vehicle # ↑	Vehicle Type	Model Ye...	Make	Model	VIN/HIN/Serial #
<input type="checkbox"/> 1	Motorcycle	2007	HARLEY-...	FLSTC HERI...	1HD1JH51X7Y...
<input checked="" type="checkbox"/> 2	Motorcycle	2015	HARLEY-...	FLHXSE CV...	1HD1PXN1XF...

Vehicle Details Additional Interest

Basic Vehicle Information

Vehicle # 2

Vehicle Type * Motorcycle

VIN/Serial Number 1HD1PXN1XFB952705

State Assigned VIN * Yes No

Model Year * 2015

Make * HARLEY-DAVIDSON

Model * FLHXSE CVO STREET GLIDE SPECIAL

Classic No

Purchase Date * 05/04/2018

Engine Size (cc) * 1803

Salvaged/Rebuilt * Yes No

Modifications - Add all that apply

Add Remove

Type

Usage - Add all that apply

When all required fields have been completed, click "Save and Next"

Policy changes

AMsuite Core

Policy Change 0000023976 (Draft) Recreational Eff. 05/04/2018 Account # 0000013350 Policy # 600005317

Policy Change 00000...

Coverages (Step 4 of 7)

When all required changes have been made, click "Quote"

< Back Save and Next > Save and Exit Quote Save Versions Withdraw Transaction

Coverages Exclusions

You are now on the Coverage Screen

Liability - Bodily Injury and Property Damage

Limit * 100,000/300,000/50,000

Passenger Liability Included

Medical Payments

Limit * 5,000

Uninsured Motorists

Pet Protection

Limit 750

Travel Loss

Make any required changes by using the drop down menu or clicking the appropriate check box

Coverages applied per vehicle

Copy Coverages

Vehicle # ↑	Description	Comprehensive	Collision	Towing Labor	Rental
1	2007HARLEY-DAVIDSON...	250	250	Not Selected	Not Selected
2	2015HARLEY-DAVIDSON...	Not Selected	Not Selected	Not Selected	Not Selected

Coverages Exclusions

Comprehensive

Deductible * 250

Settlement Option Actual Cash Value

Diminishing Deductible * Yes No

Collision

Deductible * 250

Settlement Option Actual Cash Value

Diminishing Deductible * Yes No

Accessories

Limit * 3,000

Settlement Option * Actual Cash Value

Personal Effects

Limit * 1,000

Deductible 200

Settlement Option * Actual Cash Value

Towing and Emergency Expense

Limit * 75

Rental Reimbursement

Breach of Warranty

Make any required changes by using the drop down menu or clicking the appropriate check box

Policy changes

Policy Change 0000023976 (Quoted) Recreational Eff. 05/04/2018 Account # 0000013350 Policy # 600005317

Policy Change 00000...

Quote

< Back Save and Next > Home Edit Policy Transaction Versions **Issue Policy** Withdraw Transaction

Policy Number 600005317
Policy Period 04/26/2018 - 04/26/2019
Primary Named Insured
Address 1602 W Schaaf Rd
 Cleveland, OH 44109-4672
County Cuyahoga
Address Type Home
Address Description

Transaction Effective Date 05/04/2018
Transaction Description Change/Add/Remove Unit
Total Premium \$723.48
Total Additional Costs -
Total Cost \$723.48
Change in Cost (\$66.52)

If everything is correct, click "Issue Policy"

Here, you can see the Transaction Effective Date and Description, as well as the Change in Cost associated with the Policy Change

You are now on the Quote page

Note the additional tabs which provide additional information on the change in cost and discounts applied

Coverages applied to all vehicles

Description	Value	Full Term Premium	Eff Date	Exp Date	Proration
Liability - Bodily Injury and Property Damage Coverage	100,000/300,000/50,000	\$260.00	04/26/2018	05/04/2018	
Liability - Bodily Injury and Property Damage Coverage	100,000/300,000/50,000	\$413.00	05/04/2018	04/26/2019	
Medical Payments Coverage	5,000	\$76.00	04/26/2018	05/04/2018	
Medical Payments Coverage	5,000	\$179.00	05/04/2018	04/26/2019	
Pet Protection Coverage	750	-	04/26/2018	04/26/2019	
Pet Protection Coverage	750	-	05/04/2018	04/26/2019	
Subtotal					

Here, you see a list of coverages that are applicable to all units on the policy (i.e. Liability Coverage)

Storage Address 1: 1602 W Schaaf Rd, Cleveland, OH 44109-4672

Vehicle 1

Model Year	Make	Model	VIN/HIN/5
2007	HARLEY-DAVIDSON	FLSTC HERITAGE SOFTAIL CLASSIC	

Description	Value	Full Term Premium	Eff Date	Exp Date	Proration
Comprehensive Coverage	250	\$146.00	04/26/2018	05/04/2018	
Comprehensive Coverage	250	\$42.00	05/04/2018	04/26/2019	
Collision Coverage	250	\$308.00	04/26/2018	05/04/2018	
Collision Coverage	250	\$88.00	05/04/2018	04/26/2019	
Accessories Coverage	3,000	-	04/26/2018	04/26/2019	
Personal Effects Coverage	1,000	-	04/26/2018	04/26/2019	
Towing and Emergency Expense Coverage	75	-	04/26/2018	04/26/2019	
Subtotal					

Here, you see a list of coverages that apply specifically to Vehicle 1 (i.e. Comprehensive & Collision, etc.)

Vehicle 2

Model Year	Make	Model	VIN/HIN/5
2015	HARLEY-DAVIDSON	FLHXSE CVO STREET GLIDE SPECIAL	

Description	Value	Premium
Total Premium		\$723.48
Total Additional Costs		-
Total Cost		\$723.48

Here, you see Vehicle 2, which has no additional coverage listed - i.e. has liability-only coverage; if comprehensive coverage is desired, you can go back to the Coverage page to add it

Policy changes

AMsuite Core Home AMsuite > modernLINK >

Policy Change 0000023976 (Quoted) Recreational Eff. 05/04/2018 Account # 0000013350 Policy # 600005317

Policy Change 00000...

- Policy Contract
 - Policy Info
 - Drivers
 - Vehicles
 - Coverages
 - CLUE Results
 - Risk Analysis
 - Policy Review
 - Quote**
 - Forms
 - Payment & Signatures
 - Notes (0)
 - Documents
 - Participants
 - Activities (0 open)
 - Edit Effective Date
 - History

Quote

< Back Save and Next > Home Edit Policy Transaction Versions Issue Policy Withdraw Transaction

Policy Number 600005317
Policy Period 04/26/2018 - 04/26/2019
Primary Named Insured
 Address 1602 W Schaaf Rd
 Cleveland, OH 44109-4672
 County Cuyahoga
 Address Type Home
 Address Description

Transaction Effective Date 05/04/2018
Transaction Description Change/Add/Remove L
Total Premium \$723.48
Total Additional Costs -
Total Cost \$723.48
Change in Cost (\$66.52)

Are you sure you want to issue this policy?

OK Cancel

Coverages applied to all vehicles

Description	Value	Full Term Premium	Eff Date	Ex
Liability - Bodily Injury and Property Damage Coverage	100,000/300,000/50,000	\$260.00	04/26/2018	0
Liability - Bodily Injury and Property Damage Coverage	100,000/300,000/50,000	\$413.00	05/04/2018	0
Medical Payments Coverage	5,000	\$76.00	04/26/2018	0
Medical Payments Coverage	5,000	\$179.00	05/04/2018	0
Pet Protection Coverage	750	-	04/26/2018	0
Pet Protection Coverage	750	-	05/04/2018	0

AMsuite Core Home

Policy Change 0000023976 (Bound) Recreational Eff. 05/04/2018 Account # 0000013350 Policy # 600005317

Policy Change Bound

Your Policy Change (#0000023976) has been bound.

- View your policy (#600005317)
 - [Print ID Cards](#)
 - [Print Declarations Page](#)

You can see that the Policy Change has been bound

Click the hyperlinks to view the policy, ID Cards, or Declarations Page

Policy changes

AMsuite®

Search by Account, Policy or Quote Number
Q
Live Chat >
modernLINK >
Training >
kenhicks ▾

Accounts
Policies
Activities
Analytics
Forms / Program Manuals
→ + START NEW QUOTE

Account MOTORSPORTS (600005317) In Force

SUMMARY
☰

CONTACTS
👤

VIEW/ADD ACTIVITIES
3

VIEW/ADD NOTES
0

VIEW/UPLOAD DOCUMENTS

BILLING / MAKE PAYMENT
✓

Change Policy
Cancel Policy
>AMsuite Core
Set Up An Online Account

DECLARATION PAGE ID CARD

Updated ID Cards and Declarations Page are immediately available

Details

Mailing/Account Address	Phone Number	Producer of Record	Total Premium	\$723.48
1602 W Schaaf Rd, Cleveland, OH 44109-4672	513555555	External (009539)	Taxes and Fees	\$0.00
Do we have the customer's permission to send autodialed pre-recorded and artificial voice calls and/or text messages to the phone number provided to all policies under this account? No	Policy Inception	Producer of Service	Total Cost	\$723.48
	April 26, 2018	External (009539)		
Policy Expiration Date	Cancellation Date			
April 26, 2019				
Pre Renewal Direction	Policy Status			
	In Force			
Cancellation Reason	Previous Policy Number			

Vehicles

Vehicle Number	Vehicle Type	Year	Make	Model	VIN/HIN/Serial #	Storage Address	Show Vehicle Coverages:
2	motorcycle	2015	HARLEY-DAVIDSON	FLHXSE CVO STREET GLIDE SPECIAL	1HD1PXN1XFB952705	1602 W Schaaf Rd,Cleveland,OH,44109-4672	
1	motorcycle	2007	HARLEY-DAVIDSON	FLSTC HERITAGE SOFTAIL CLASSIC	1HD1JH51X7Y123456	1602 W Schaaf Rd,Cleveland,OH,44109-4672	

You can see that Vehicle 2 has been successfully added

Drivers

Policy Transactions

Here is the record of the Policy Change
All ▾
Search Transactions

JOB NUMBER	TRANSACTION STATUS	TYPE	PERIOD STATUS	CREATED BY	CREATED DATE	EFFECTIVE DATE
0000023976	Bound	Policy Change	In Force	Ken Hicks	5/4/18	5/4/18
0000023739	Bound	Submission	In Force	Ken Hicks	4/26/18	4/26/18

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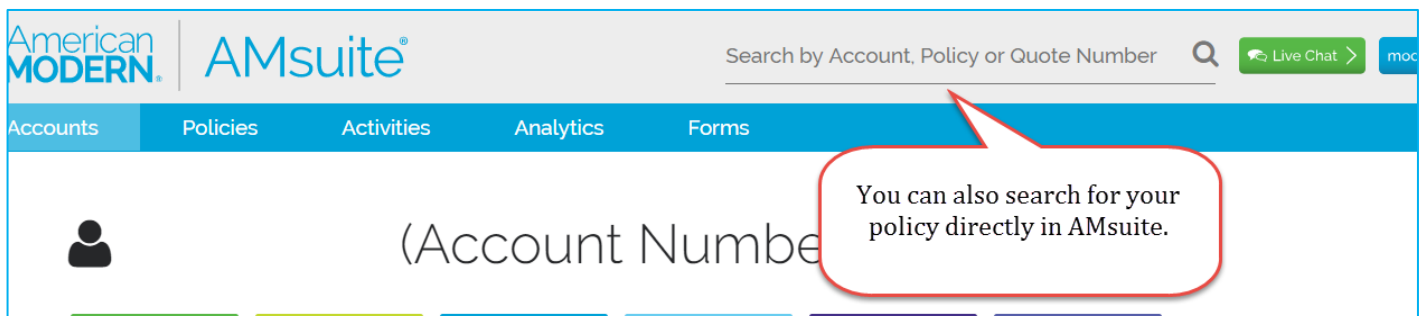
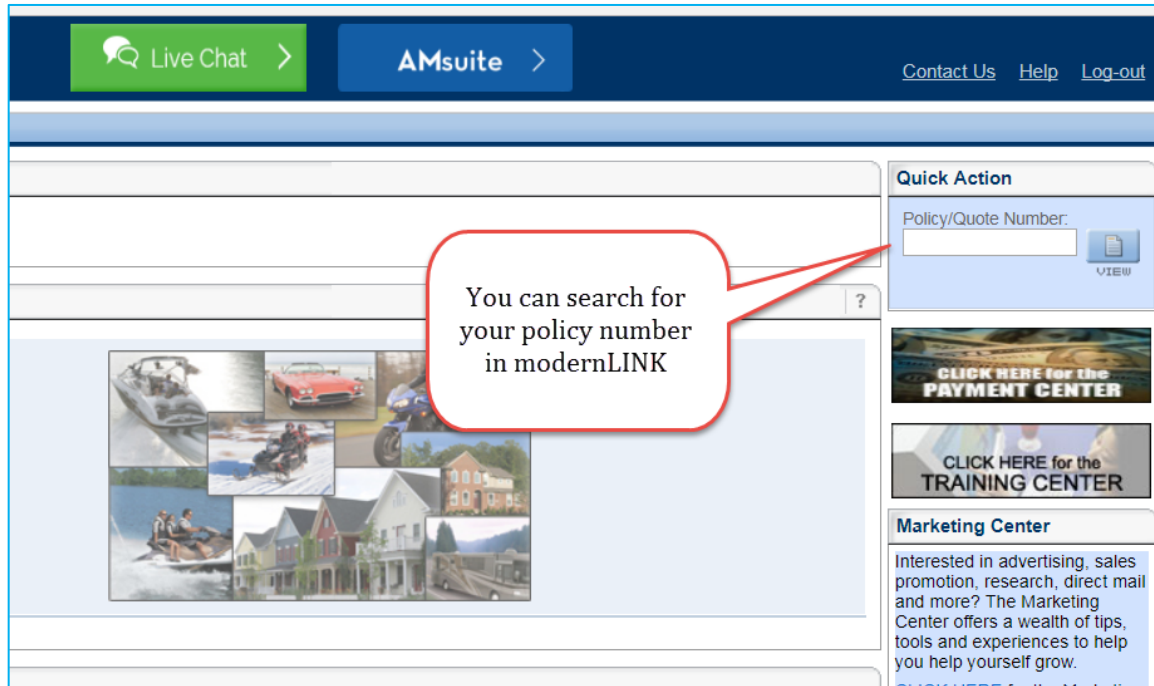
May 2018

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Occupancy Change

This job aid will provide step by step instructions for completing an Occupancy Change in the AMsuite® system. (i.e. Vacant to Rental)

1. Search for the Policy either from modernLINK® or AMsuite



Occupancy Change

American MODERN | AMsuite® Search by Account, Policy

Home Accounts Policies Activities Analytics Forms / Program Manuals

Search Results

Policies (1)

600006217
Justin Time
100 E Main St,
Amelia, OH45102-1918

Select your policy number

Home Accounts Policies Activities Analytics Forms / Program Manuals

Account: [Justin Time](#)

Dwelling Special (600006217)

In Force

SUMMARY ☰	CONTACTS 👥	VIEW/ADD ACTIVITIES 1	VIEW/ADD NOTES 0	VIEW/UPLOAD DOCUMENTS	BILLING / MAKE PAYMENT ✓
---------------------	---------------	-----------------------------	------------------------	--------------------------	-----------------------------------

[✎ Change Policy](#) [✕ Cancel Policy](#) [>AMsuite Core](#) [Set Up An Online Account](#)

[DECLARATION PAGE APPLICATION \(unsigned version\)](#)

To Change the
Occupancy Type select
Change Policy

Occupancy Change

Policy Changes

| Set Date of Change

< October 2018 >
< 22 >
Monday
Continue

Choose effective date of change, select **Continue**.

Cancel

Policy Changes

Date | Select Changes

22
October 2018

Change/Add/Remove Unit
Continue

Select Change Type

Cancel

Occupancy Change

Policy Change 0000028266 (Draft) Dwelling Special Eff. 10/22/2018 Justin Time Account # 0000000468 Policy # 600006217

Policy Change 00000...

Policy Contract

Policy Info

Dwelling

Dwelling Construction

Coverages

CLUE Results

Risk Analysis

Policy Review

Quote

Forms

Payment & Signatures

Notes (0)

Documents

Participants

Activities (0 open)

Edit Effective Date

History

Dwelling (Step 2 of 7)

< Back Save and Next > Save and Exit Quote Save Versions Withdraw Transaction

Create Dwelling Remove Dwelling

Dwelling # ↑	Address	Residence Type	Occupancy
1	5439 Oak Ridge Dr, Will...	1 Family Residence	Vacant

Details Protection Details Underwriting Additional Interests

Dwelling # 1

Location Change To: 5439 Oak Ridge Dr Willoughby, OH 44094-3139 [Get Territory Details](#)

Territory Code 1

County Lake

Protection Class Code 3

Residence Type 1 Family Residence

Is the dwelling a Townhome or Row Home? No

How is the dwelling occupied? **Vacant**

Some information on this page has been retrieved from MSB and may have changed from previous values. If any information on this page needs to be changed but it appears as "read-only" on this page, please click "Go to MSB" and make the changes there. Then click "Retrieve from MSB".

1 Click "Dwelling" on the Left Side Navigation

2 Change Occupancy to the desired occupancy (i.e. vacant to rental)

Policy Change 00000...

Policy Contract

Policy Info

Dwelling

Dwelling Construction

Coverages

CLUE Results

Risk Analysis

Policy Review

Quote

Forms

Payment & Signatures

Notes (0)

Documents

Participants

Activities (0 open)

Edit Effective Date

History

Dwelling (Step 2 of 7) [Need help? Click here →](#)

< Back Save and Next > Save and Exit Quote Save Versions Withdraw Transaction

Create Dwelling Remove Dwelling

Dwelling # ↑	Address	Residence Type	Occupancy
1	5439 Oak Ridge Dr, Will...	1 Family Residence	Rental

Details **Protection Details** Underwriting Additional Interests

Central Station Fire & Smoke Alarm Yes No

Central Station Burglar Alarm Yes No

Local Smoke and/or Burglar Alarm Yes No

Deadbolts, Smoke Alarm and Fire Extinguisher Yes No

Change in the Occupancy will Require you to answer new Protection Class Questions and Underwriting Questions. Click on these areas and answer questions

The following are required for issuance

Earth home, dome home, or any other non-conventional design?	<input type="radio"/> Yes <input type="radio"/> No
Supported on raised poles or pilings over 6 feet?	<input type="radio"/> Yes <input type="radio"/> No
Condemned?	<input type="radio"/> Yes <input type="radio"/> No
Any water leaks or unrepaired water damage?	<input type="radio"/> Yes <input type="radio"/> No
Any broken or boarded-up windows, or any other unrepaired damage?	<input type="radio"/> Yes <input type="radio"/> No
Currently have working utilities?	<input type="radio"/> Yes <input type="radio"/> No
In an area that is prone to or had a prior occurrence of landslides, forest fires,	<input type="radio"/> Yes <input type="radio"/> No

Occupancy Change

Policy Change 0000028266 (Draft) Dwelling Special Eff. 10/22/2018 Justin Time Account # 0000000468 Policy # 600006217

Policy Change 00000...

- Policy Contract
 - Policy Info
 - Dwelling**
 - Dwelling Construction
 - Coverages
 - CLUE Results
 - Risk Analysis
 - Policy Review
 - Quote
 - Forms
 - Payment & Signatures

Dwelling (Step 2 of 7) [Need help? Click here →](#)

< Back Save and Next > Save and Exit **Quote** Save Versions ▾ Withdraw Transaction

Create Dwelling Remove Dwelling

Dwelling # ↑	Address	Residence Type	Occupancy
1	5439 Oak Ridge Dr, Will...	1 Family Residence	Rental

Details Protection Details **Underwriting** Additional Interests

The following are required for issuance

Earth home, dome home, or any other non-conventional design?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Supported on raised poles or pilings over 6 feet?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Condemned?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Any water leaks or unrepaired water damage?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Any broken or boarded-up windows, or any other unrepaired damage?	<input type="radio"/> Yes <input checked="" type="radio"/> No

To obtain the Change in Premium, click on "Quote"

Policy Change 0000028266 (Quoted) Dwelling Special Eff. 10/22/2018 Justin Time Account # 0000000468 Policy # 600006217

Policy Change 00000...

- Policy Contract
 - Policy Info
 - Dwelling
 - Dwelling Construction
 - Coverages
 - CLUE Results
 - Risk Analysis
 - Policy Review
 - Quote**
 - Forms
 - Payment & Signatures
 - Notes (0)
 - Documents
 - Participants

Quote

< Back Save and Next > Home Edit Policy Transaction Versions ▾ **Issue Policy** Withdraw Transaction

Policy Number	600006217	Transaction Effective Date	10/22/2018
Policy Period	10/22/2018 - 10/22/2019	Transaction Description	Change/Add/Remove Unit
Primary Named Insured	Justin Time	Total Premium	\$660.00
Address	100 E Main St Amelia, OH 45102-1918	Total Additional Costs	-
County	Clermont	Total Cost	\$660.00
Address Type	Home	Change in Cost	(\$1,610.00)
Address Description			

Policy Premium Cost Change Detail Discounts Applied

Policy Type Dwelling Special

Policy Level Coverages

Description	Value	Premium

The Change in Cost will display. Click "Issue Policy" to Bind this Occupancy Change.

Occupancy Change

Policy Change 0000028266 (Quoted) Dwelling Special Eff. 10/22/2018 Justin Time Account # 0000000468 Policy # 600006217

Policy Change 00000...

- Policy Contract
 - Policy Info
 - Dwelling
 - Dwelling Construction
 - Coverages
 - CLUE Results
 - Risk Analysis
 - Policy Review
 - Quote**
 - Forms
 - Payment & Signatures
 - Notes (0)
 - Documents
 - Participants
 - Activities (0 open)

Quote

< Back Save and Next > Home Edit Policy Transaction Versions Issue Policy Withdraw Transaction

Policy Number	600006217	Transaction Effective Date	10/22/2018
Policy Period	10/22/2018 - 10/22/2019	Transaction Description	Change/Add/Remove L
Primary Named Insured	Justin Time	Total Premium	\$660.00
Address	100 E Main St Amelia, OH 45102-1918	Total Additional Costs	-
County	Clermont	Cost	\$660.00
Address Type	Home	Net Cost	(\$1,610.00)
Address Description			

Are you sure you want to issue this policy?

OK Cancel

Policy Type Dwelling Special

Policy Level Coverages

Description	Value	Premium
Subtotal		-

Dwelling Level Coverages

A pop up will appear to verify this change. Click "OK"

AMsuite Core Home Live Chat

Policy Change 0000028266 (Bound) Dwelling Special Eff. 10/22/2018 Justin Time Account # 0000000468 Policy # 600006217

Policy Change Bound

Your Policy Change (#0000028266) has been bound.

- View your policy (#600006217)
- Print Declarations Page

Documentation to collect and retain:

Copy of Insured's AAA Membership card

You are advised the change is bound

You can then:

- View the Policy by clicking on the hyperlink
- Print the new DEC

Policy changes

Adding a Lienholder to an Existing AMsuite® Policy

Account: [REDACTED]

Dwelling Basic (600005343) In Force

SUMMARY ☰	CONTACTS 👤	VIEW/ADD ACTIVITIES 2	VIEW/ADD NOTES 0	VIEW/UPLOAD DOCUMENTS	BILLING / MAKE PAYMENT ✓
---------------------	---------------	-----------------------------	------------------------	--------------------------	-----------------------------------

✎ Change Policy ✕ Cancel Policy >AMsuite Core Set Up An Online Account

DECLARATION PAGE


Details

Click "Change Policy"
to begin the Policy
Change Request

Policy changes

Policy Changes


Policy | Set Date of Change

 14068 Adventure Lane	<p>May 2018</p> <p>2 Wednesday</p> <p>Continue</p>
---	--

Enter the effective date of your change by using the green arrows, then click "Continue"

Cancel

Policy Changes


Policy	Date	Select Changes
 14068 Adventure Lane	2 May 2018	<input type="text"/> <input type="checkbox"/>

Use the drop-down list to select the appropriate type of change

Cancel


Policy changes

Policy Changes

Policy	Date	Select Changes
 14068 Adventure Lane	2 May 2018	<ul style="list-style-type: none">Change/Add/Remove CoverageChange/Add/Remove DriverChange/Add/Remove UnitChange/Add/Remove Additional InsuredChange/Add/Remove Additional InterestChange AddressChange Agent of RecordChange Billing/PaymentsChange Primary Named InsuredMultiple ChangesOther

In order to make changes to the Lienholder, select "Change/Add/Remove Additional Interest"

Policy Changes

Policy	Date	Select Changes
 14068 Adventure Lane	2 May 2018	<p>Change/Add/Remove Additional Interest</p> <p><input type="button" value="Continue"/></p>

Click "Continue"

Policy changes

AMsuite Core Notice you are now in AMsuite Core Home [Live Chat](#)

Policy Change 0000023921 (Draft) Residential Eff. 05/02/2018 Account # 0000013390 Policy # 600005343

Policy Change 00000... **Policy Info (Step 1 of 7)**

Save and Next > Save and Exit Quote Save Versions Withdraw Transaction

Primary Named Insured	Change To: <input type="button" value="v"/>
Name	Dennis Seinhart
Primary Phone	513-947-6596
Primary Email	<input type="text" value="none@amig.com"/>
Policy Mailing Address	Change To: <input type="button" value="v"/>
	14068 Adventure Lane Cincinnati, OH 45242
County	HAMILTON
Address Type	Home
Address Description	
Official IDs	
SSN	###-##-####

Policy Details	
Previous Policy Number	
Term Type	Annual
Term Number	2
Policy Type	Dwelling Basic
Effective Date	05/02/2018
Expiration Date	05/02/2019
Rate as of Date	05/02/2018
Rating State	Ohio
Producer of Record	
Producer Code	009539
Contracted Agency	Ken Hicks
Producer	Ken Hicks
Producer of Service	
Agent Servicing	
Producer Code	009539
Contracted Agency	Ken Hicks
Producer	Ken Hicks

You can see that you are now creating a Policy Change

Policy Change 00000... **Policy Info (Step 1 of 7)**

Save and Next > Save and Exit Quote Save Versions Withdraw Transaction

Primary Named Insured	Change To: <input type="button" value="v"/>
Name	Dennis Seinhart
Primary Phone	513-947-6596
Primary Email	<input type="text" value="none@amig.com"/>
Policy Mailing Address	Change To: <input type="button" value="v"/>
	14068 Adventure Lane Cincinnati, OH 45242
County	HAMILTON
Address Type	Home
Address Description	
Official IDs	
SSN	###-##-####

Policy Details	
Previous Policy Number	
Term Type	Annual
Term Number	2
Policy Type	Dwelling Basic
Effective Date	05/02/2018
Expiration Date	05/02/2019
Rate as of Date	05/02/2018
Rating State	Ohio
Producer of Record	
Producer Code	009539
Contracted Agency	Ken Hicks
Producer	Ken Hicks
Producer of Service	
Agent Servicing	
Producer Code	009539
Contracted Agency	Ken Hicks
Producer	Ken Hicks

Click on "Dwelling" to navigate to the next page

Policy changes

Policy Change 00000...

Dwelling (Step 2 of 7) [Need help? Click here →](#)


[< Back](#) [Save and Next >](#) [Save and Exit](#) [Quote](#) [Save](#) [Versions ▾](#) [Withdraw Transaction](#)

[Create Dwelling](#) [Remove Dwelling](#)

<input type="checkbox"/>	Dwelling # ↑	Address	Residence Type	Occupancy
<input checked="" type="checkbox"/>	1	14068 Adventure Lane,...	1 Family Residence	Owner Occupied

[Details](#) [Protection Details](#) [Underwriting](#) **[Additional Interests](#)**

Dwelling # 1

Location Change To: 

14068 Adventure Lane
Cincinnati, OH 45242

[Get Territory Details](#)

Click "Additional Interests" to open the tab

Policy Change 00000...

Dwelling (Step 2 of 7) [Need help? Click here →](#)

[< Back](#) [Save and Next >](#) [Save and Exit](#) [Quote](#) [Save](#) [Versions ▾](#) [Withdraw Transaction](#)

[Create Dwelling](#) [Remove Dwelling](#)

<input type="checkbox"/>	Dwelling # ↑	Address	Residence Type	Occupancy
<input checked="" type="checkbox"/>	1	14068 Adventure Lane,...	1 Family Residence	Owner Occupied

[Details](#) [Protection Details](#) [Underwriting](#) **[Additional Interests](#)**

Dwelling Additional Interest

[Add ▾](#) [Remove](#)

Click "Add" and then select "New Company" from the drop-down list

Interest Type	Description	Contract N...
New Company		
New Person		
Other Contacts ▾		

Policy changes

Policy Change 0000023921 (Draft) Residential Eff. 05/02/2018 Account # 0000013390 Policy # 600

Policy Change 00000...

- Policy Contract
 - Policy Info
 - Dwelling**
 - Dwelling Construction
 - Coverages
 - CLUE Results
 - Risk Analysis
 - Policy Review
 - Quote
 - Forms
 - Payment & Signatures
- Notes (0)
 - Documents
 - Participants
 - Activities (0 open)
 - Edit Effective Date
 - History

New Additional Interest [Return to Dwelling](#)

OK Cancel

Interest Type * <none> X

Contract Number <none>

Contact Detail

Company

Name *

Company Type * <none>

Office Phone

Fax

Primary Email

Secondary Email

Relationship to Primary Insured * Other

Address

Same address as: [v]

Country United States

Attention/Care of

Address 1 *

Address 2

City *

State * <none>

ZIP Code * #####-####

Select "Mortgagee" from the drop-down list and then fill in all required information

Policy changes

Policy Change 0000023921 (Draft) Residential Eff. 05/02/2018 Account # 0000013390 Policy # 60000

New Additional Interest [Return to Dwelling](#)

OK Cancel

Interest Type * Mortgagee

Contract Number

Contact Detail

Company

Name * Chase Home Finance LLC ISAOA

Company Type * All Other

Office Phone

Fax

Primary Email

Secondary Email

Relationship to Primary Insured * Other

Address

Same address as:

Country United States

Attention/Care of

Address 1 * PO Box 47020

Address 2

City * Doraville

State * Georgia

ZIP Code * 30362

Address Type * Business

Be sure to select "Mortgagee" for a Lienholder

Enter Relationship to Primary Insured as "Other"

For Address Type, select "Business" unless the policy is lienholder billed, in which case select "Billing"

Policy changes

Policy Change 000023921 (Draft) Residential Eff. 05/02/2018 Account # 0000

Policy Change 00000...

- Policy Contract
- Policy Info
- Dwelling**
- Dwelling Construction
- Coverages
- CLUE Results
- Risk Analysis
- Policy Review
- Quote
- Forms
- Payment & Signatures

New Additional Interest [Return to Dwelling](#)

Click "OK" to continue

Interest Type * Mortgagee

Contract Number

Contact Detail

Company

Name * Chase Home Finance LLC ISAOA

Company Type * All Other

Office Phone

Fax

Primary Email

Secondary Email

Relationship to Primary Insured * Other

Policy changes

Policy Change 0000023921 (Quoted) Residential Eff. 05/02/2018 Account # 0000013390 Policy # 600005343

Policy Change 00000...

Quote

< Back Save and Next > Home Edit Policy Transaction Versions **Issue Policy** Withdraw Transaction

Policy Number 600005343
Policy Period 05/02/2018 - 05/02/2019
Primary Named Insured Dennis Seinhart
Address 14068 Adventure Lane Cincinnati, OH 45242
County HAMILTON
Address Type Home
Address Description

Transaction Effective Date 05/02/2018
Transaction Description Change/Add/Remove Additional Interest
Total Premium \$1,223.00
Total Additional Costs -
Total Cost \$1,223.00
Change in Cost -

Click "Issue Policy" to bind your Policy Change

Here you can see a summary of the Policy Change, including the Transaction Effective Date and Transaction Description; As this is a Lienholder Change, there is no change in cost

Policy Premium Cost Change Detail Discounts Applied

Policy Type Dwelling Basic

Policy Level Coverages

Description	Value	Premium
Personal Liability Cove...		\$70.00
Limit	300,000	
Damage to Property of...	1,000	
Medical Payments Cov...		Included
Limit (per person/per oc...	500/25,000	

Policy Change 0000023921 (Quoted) Residential Eff. 05/02/2018 Dennis Seinhart Account # 0000013390 Policy # 600005343

Policy Change 00000...

Quote

< Back Save and Next > Home Edit Policy Transaction Versions **Issue Policy** Withdraw Transaction

Policy Number 600005343
Policy Period 05/02/2018 - 05/02/2019
Primary Named Insured Dennis Seinhart
Address 14068 Adventure Lane Cincinnati, OH 45242
County HAMILTON
Address Type Home
Address Description

Transaction Effective Date 05/02/2018
Transaction Description Change/Add/Remove Additional Interest
Total Premium \$1,223.00
Total Additional Costs -
Total Cost \$1,223.00
Change in Cost -

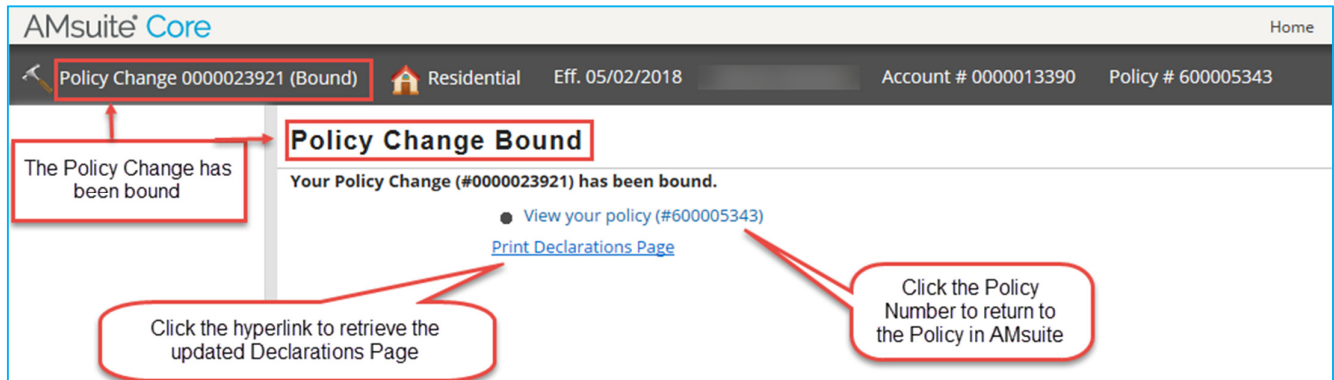
Are you sure you want to issue this policy?

Click "OK" to continue

Policy Premium Cost Change Detail Discounts Applied

Policy Type Dwelling Basic

Policy changes



The screenshot displays the AMsuite Core interface. At the top, the breadcrumb trail reads: "Policy Change 0000023921 (Bound) > Residential > Eff. 05/02/2018 > Account # 0000013390 > Policy # 600005343". The main content area features a "Policy Change Bound" header and a message: "Your Policy Change (#0000023921) has been bound." Below this message are two links: "View your policy (#600005343)" and "Print Declarations Page". Three callout boxes provide instructions: one points to the breadcrumb, another points to the "Print Declarations Page" link, and a third points to the "View your policy" link.

AMsuite[®] Core Home

Policy Change 0000023921 (Bound) Residential Eff. 05/02/2018 Account # 0000013390 Policy # 600005343

Policy Change Bound

Your Policy Change (#0000023921) has been bound.

- [View your policy \(#600005343\)](#)

[Print Declarations Page](#)

The Policy Change has been bound

Click the hyperlink to retrieve the updated Declarations Page

Click the Policy Number to return to the Policy in AMsuite

Policy changes

AMsuite®

Search by Account, Policy or Quote Number

Live Chat
modernLINK
Training

kenhicks

Accounts
Policies
Activities
Analytics
Forms / Program Manuals

→
+ START NEW QUOTE

Account: [Redacted]

Dwelling Basic (600005343) In Force

SUMMARY

CONTACTS

VIEW/ADD ACTIVITIES
3

VIEW/ADD NOTES
0

VIEW/UPLOAD DOCUMENTS

BILLING / MAKE PAYMENT

Change Policy

Cancel Policy

>AMsuite Core

Set Up An Online Account

DECLARATION PAGE

Click here to retrieve the updated Declarations Page

Details

Mailing/Account Address	Phone Number	Producer of Record	Total Premium	\$1,223.00
14068 Adventure Lane, Cincinnati, OH 45242	5139476596	External (009539)	Taxes and Fees	\$0.00
Do we have the customer's permission to send autodialed pre-recorded and artificial voice calls and/or text messages to the phone number provided to all policies under this account? No	Policy Inception May 2, 2018	Producer of Service External (009539)	Total Cost	\$1,223.00
Policy Expiration Date May 2, 2019	Cancellation Date			
Pre Renewal Direction	Policy Status In Force			
Cancellation Reason	Previous Policy Number			

Property

Coverages

Policy Transactions

All
Search Transactions

JOB NUMBER	TRANSACTION STATUS	TYPE	PERIOD STATUS	CREATED BY	CREATED DATE	EFFECTIVE DATE
0000023921	Bound	Policy Change	In Force	Ken Hicks	5/2/18	5/2/18
0000023904	Bound	Rewrite Full Term	In Force	Ken Hicks	5/1/18	5/2/18
0000023903	Bound	Cancellation	Canceled	Ken Hicks	5/1/18	5/1/18
0000023901	Bound	Submission	In Force	Ken Hicks	5/1/18	5/1/18

This is the record of the completed Policy Change

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May 2018

Policy changes

Account:

Dwelling Basic (600005343) In Force

SUMMARY

☰

CONTACTS

👤

VIEW/ADD ACTIVITIES

3

VIEW/ADD NOTES

0

VIEW/UPLOAD DOCUMENTS

BILLING / MAKE PAYMENT

✓

✎ Change Policy

✕ Cancel Policy

>AMsuite Core

Set Up An Online Account

[DECLARATION PAGE](#)

Click here to see the Lienholder in AMsuite

Account:

Dwelling Basic (600005343) In Force

SUMMARY

☰

CONTACTS

👤

VIEW/ADD ACTIVITIES

3

VIEW/ADD NOTES

0

VIEW/UPLOAD DOCUMENTS

BILLING / MAKE PAYMENT

✓

Policy Contacts (2)

Contacts associated with this policy only All Roles (Default)

CONTACT	ROLES	INVOLVED WITH
<div style="background-color: #4CAF50; color: white; border-radius: 50%; width: 30px; height: 30px; display: flex; align-items: center; justify-content: center; margin: 0 auto;">CH</div> <p>Chase Home Finance LLC ISAOA</p>	<p>Additional Interest</p>	<p>1 Active Policy</p> <p>></p>
<div style="background-color: #4CAF50; color: white; border-radius: 50%; width: 30px; height: 30px; display: flex; align-items: center; justify-content: center; margin: 0 auto;">DS</div> <p> </p> <p>📞 5139476596</p> <p>✉ none@amig.com</p>	<p>Billing Contact</p> <p>Primary Named Insured</p>	<p>3 Active Policies</p> <p>></p>

The Lienholder now appears as an Additional Interest in AMsuite

For questions about using AMsuite®, contact American Modern's Customer Service Team.

TAB:

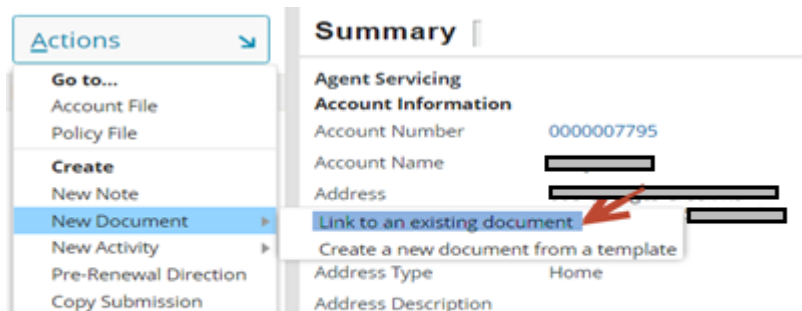
Additional Functions in AMsuite Core

Attachments

1

Attachments can be uploaded before the submission is issued, or after.

Go the **Actions** tab. Slide down to **New Document** and hold until **Link to an existing document** displays. Click on **Link to an existing document**.



2

New Document

[Update](#) [Cancel](#)

Attention! Documents containing unmasked credit card numbers or sensitive information are not displayed. These documents must be securely retained in your office. All other documents are displayed.

Document Contents

Attachment * [Browse](#)

Name *

Click **Browse** to locate the document on your computer that you wish to upload to the file. The Attachments are stored at the **Account** level. Be sure to name the document with enough detail to easily recognize what it is.

Click **Update** for the file to be saved.

Repeat this process for each file that needs to be attached.

****Remember never to store Non-Public Personal Information (NPPI) in the note fields. Notes become part of the official record and cannot be deleted. Therefore, do not enter any personal or unprofessional comments.**

For questions about using AMsuite, contact American Modern's Customer Service Team @ 1-800-543-2644.

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Documents

This document provides the steps to locate documents on a policy.

- Where to find Policy Documents (Dec pages)

Key Benefits

AMsuite is American Modern's state-of-the-art software solution. It consolidates the policy administration, claims and data applications into one platform for all Personal Lines products.

From motorcycles to manufactured homes, users will benefit from the same functionality, flow and flexible navigation. In a nut shell, AMsuite will make it easier for you to do what you do best—serve customers.

Locating Policy Documents

Before you can send policy documents, you'll first need to locate the policy.

1 Click **Policy**. Enter the customer's 9-digit policy number. Click the search icon. (You can also locate the policy by accessing the Account, and then select the policy.)

2 Click **Documents**, found in the left hand navigation bar. Select **View/Print** for the document you wish to view/print. Dec pages are found under the **Document** tab.

Documents

Document Name
 Related To: <none>
 Type: <none>
 Search Reset

Documents

Documents Requiring Signature Documents

Send Print Request

		Name	Actions	Type
<input type="checkbox"/>	<input type="checkbox"/>	MS-CW-C-0005-01-15	View/Print	Outbound Documents
<input type="checkbox"/>	<input type="checkbox"/>	IL-CW-N-0001-06-16	View/Print	Outbound Documents
<input type="checkbox"/>	<input type="checkbox"/>	MS-CO-G-0001-01-15	View/Print	Outbound Documents
<input type="checkbox"/>	<input type="checkbox"/>	Submission	View/Print	Outbound Documents
<input type="checkbox"/>	<input type="checkbox"/>	IL-CW-N-0002-01-15	View/Print	Outbound Documents
<input type="checkbox"/>	<input type="checkbox"/>	IL-CW-G-0001-01-15	View/Print	Outbound Documents
<input type="checkbox"/>	<input type="checkbox"/>	MS-CW-C-0009-01-15	View/Print	Outbound Documents
<input type="checkbox"/>	<input type="checkbox"/>	MS-CW-N-0001-01-15	View/Print	Outbound Documents
<input type="checkbox"/>	<input type="checkbox"/>	IC-CW-N-0001-01-15	View/Print	Outbound Documents
<input type="checkbox"/>	<input type="checkbox"/>	MS-CO-A-0001-01-15	View/Print	Outbound Documents

For Agent Use Only - Not for Distribution

Policy Correspondence/Printing Verification of Coverage

This document provides the steps to guide you to create and send policy correspondence from AMsuite.

- Create Policy Documents
- Send Policy Documents to Recipients

Key Benefits

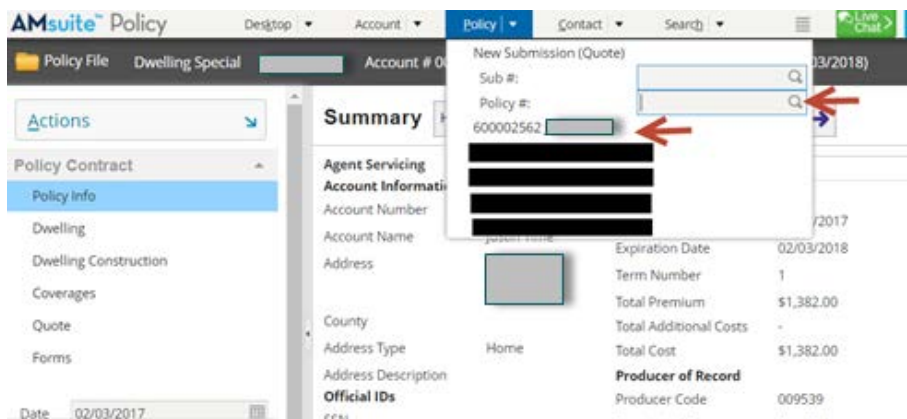
AMsuite is American Modern's state-of-the-art software solution. It consolidates the policy administration, claims and data applications into one platform for all Personal Lines products.

From motorcycles to manufactured homes, users will benefit from the same functionality, flow and flexible navigation. In a nut shell, AMsuite will make it easier for you to do what you do best—serve customers.

Create Policy Documents

Before you can send policy correspondence, you'll first need to locate the policy.

- 1 Click **Policy**. Enter the customer's 9-digit policy number. Click the search icon. It may be in your drop down list to click on also. You could also locate the policy by accessing the Account, and then select the policy.

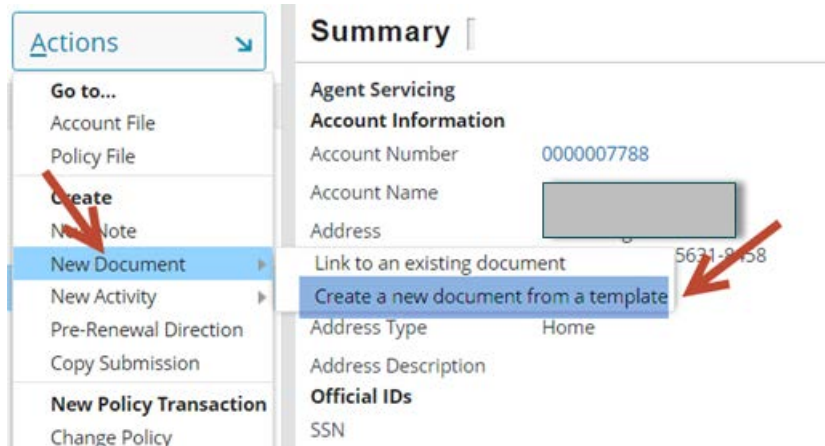


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Policy Correspondence/Printing Verification of Coverage

2

Click **Actions**. Select **New Document** from the **Actions** menu. Select **Create a New Document from a template**.



3

Select a template. Click the search icon to choose from a list.




Policy Correspondence/Printing Verification of Coverage

4


Select a **Document Type**.

New Document

Document Templates [Return to New Document](#)


Document Type 

Keywords

Effective Date 

Search Results

« < | Page 1 of 2 | > »

	Template ID	Name	Document Type
<input type="button" value="Select"/>	AddressChangeReason....	Address Change Reason	Other/General
<input type="button" value="Select"/>	AddressDiscrepancyNBP...	Address Discrepancy Ne...	Other/General
<input type="button" value="Select"/>	AddressDiscrepancyNBP...	Address Discrepancy Ne...	Other/General
<input type="button" value="Select"/> 	ClaimRepairConfirmatio...	Claim-Repair Confirmati...	Other/General

5

The list of templates is displayed at the bottom of the page. Scroll to Page 2 for additional templates.

Locate the template you want and click **Select**.

Pay attention to the template names and whether they are written for policy holder or producer.

6

Click **Create document**.

The template will open as a pre-populated word document.

7

Update the document with changes, if necessary, and run spell check.

Review the entire document for leftover prefill text, such as {enter free form}.

If you know you will be sending the document to multiple recipients, put cc: and the names at the bottom of the document. This will remind you of the primary recipient and who was copied, since you will have to do this manually.

Policy Correspondence/Printing Verification of Coverage

8

Browse to a location on your computer and save the document to your department or 3 agency's agreed-upon location.

The document will become available in AMsuite Policy in PDF format.

Send Policy Documents to Recipients

9

To send the document to a single recipient, select **Browse** to locate the document you just saved.

10

Click the **Recipient Type** search button to select a recipient type.

If you are not sending the document yet, such as when you prefer to print or send via e-mail, select 'Yes' to **Image Document Only**.

11

If you are sending it now, check one **Recipient type** option: Producer, Contracted Agency, or Policy contact. Only one recipient can be selected.

Click the drop-down arrow and select a **Recipient** from the list.

12

Click **Update**. If you selected a single recipient, you are done.

If you selected 'Yes' to **Image document only**, determine if you need to e-mail it.

If you need to e-mail it, click **Documents** in the **Sidebar**.

- Click the **Documents** tab. Locate the document in the list.
- Click to open the PDF document.
- Click the icon to send the e-mail and it will go through the proper encryption. If it goes to one recipient, you do not need to do anything further. Follow the prompts.



13

If you do not need to e-mail it now, determine if you need to follow up on this. If so, set a reminder activity for yourself.

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Policy Correspondence/Printing Verification of Coverage

- Click **Actions, New Activity**.
- Select **Reminder**.
- Select a **Reminder type** from the list.
- Add a note to the activity. The note will remain on the policy even after the activity is completed.
- Set the date according to the date on the document. If this is for a single recipient, you do not need to do anything further.

**Remember never to store Non-Public Personal Information (NPPI) in the note fields. Notes become part of the official record and cannot be deleted. Therefore, do not enter any personal or unprofessional comments.

Review the *Using the Desktop to Manage Activities* module for more information on activity management.

Multiple Recipients

14

To send to multiple recipients, make sure the policy is open, and click **Documents** from the **Sidebar**.

15

Click the **Documents** tab.

16

Check the box for the document you want to send and click **Send Print Request**.

17

Select a **Recipient** from the list. If you already sent it to a single recipient, this process allows you to send it to additional recipients. If you added the cc: at the bottom of the document, you can use this list for reference.

18

Click **Send**.

Repeat this process for each recipient

For questions about using AMsuite, contact American Modern's Customer Service Team @ 1-800-543-2644.

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Side by Side Versions

This document provides the steps to use the Side by Side feature in AMsuite.

- Start Side by Side
- Quote all versions
- Select appropriate version

Key Benefits

AMsuite is American Modern's state-of-the-art software solution. It consolidates the policy administration, claims and data applications into one platform for all Personal Lines products.

From motorcycles to manufactured homes, users will benefit from the same functionality, flow and flexible navigation. In a nut shell, AMsuite will make it easier for you to do what you do best—serve customers.

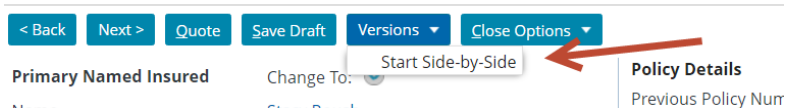
Start Side by Side

Before you can start a Side by Side, you'll first need to locate the submission.

1 Click **Policy**. Enter the customer's 10-digit submission number. Click the search icon. (You could also locate the submission by accessing the Account, and then select the submission.)

2 From any page of the submission, select the **Versions** dropdown and click **Start Side by Side**.

Policy Info



The screenshot shows a navigation bar with buttons: < Back, Next >, Quote, Save Draft, Versions (dropdown), and Close Options (dropdown). Below the navigation bar, there are fields for 'Primary Named Insured' and 'Change To:'. A red arrow points to the 'Start Side-by-Side' option in the Versions dropdown menu. To the right, there is a 'Policy Details' section with 'Previous Policy Nurr'.

3 This will start three Side by Side comparisons where you can quickly select and quote the submission with different coverage options. Notice the "Version" field is editable so you can name each version appropriately (e.g. Water 100%). See Screen shots below.

Side by Side Versions

Side-by-Side Quoting				
	Quote All	Validate All	Add Side-by-Side Version	Save All
Name	Version #1	Water 100%	Version #3	
Policy Type	Dwelling Special	Dwelling Special	Dwelling Special	
Policy Premium	\$625.00			
Actions	Select [Icons]	Select [Icons]	Select [Icons]	
Coverages that apply to all dwellings				
Coverages that apply per dwelling				
Additional Living Expense/Fair Rental Value	Yes 18742	Yes 18742	Yes 18742	
Dwelling	Yes	Yes	Yes	
Limit	187423	187423	187423	
Water Backup and Sump Overflow	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Limit				
Deductible				
Water Damage	Yes	Yes	Yes	
Percentage	10%	10%	10%	
Limit	21635	21635	21635	
Specific Building Exclusion	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Mold Exclusion - Premises Liability	Yes	Yes	Yes	
Equipment Breakdown	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Fire Department Service Charge	500	500	500	

Side by Side Versions

Quote all Versions

4

When you have selected the different coverage options you want to quote click **Quote All**

Side-by-Side Quoting

Quote All Validate All Add Side-by-Side version Save All

	Version #1	Version #2	Version #3
Name	Version #1	Version #2	Version #3
Policy Type	Dwelling Special	Dwelling Special	Dwelling Special
Policy Premium	\$722.00		
Actions	Select	Select	Select
Coverages that apply to all dwellings			
Coverages that apply per dwelling			
Additional Living Expense/Fair Rental Value	Yes 21635	Yes 21635	Yes 21635
Dwelling	Yes	Yes	Yes
Limit	216346	216346	216346

5

This will quote all three versions simultaneously and display the premium amounts

Side-by-Side Quoting

Add Side-by-Side Version Save All

	Version #1	Version #2	Version #3
Name	Version #1	Version #2	Version #3
Policy Type	Dwelling Special	Dwelling Special	Dwelling Special
Policy Premium	\$722.00	\$746.00	\$782.00
Actions	Select	Select	Select
Coverages that apply to all dwellings			
Coverages that apply per dwelling			
Additional Living Expense/Fair Rental Value	Yes 21635	Yes 21635	Yes 21635
Dwelling	Yes	Yes	Yes
Limit	216346	216346	216346

Side by Side Versions

Select Appropriate Version

6

After reviewing the different options click **Select** on the version you wish to continue with.

Side-by-Side Quoting

[Add Side-by-Side Version](#) [Save All](#)

Name	Version #1	Version #2	Version #3
Policy Type	Dwelling Special	Dwelling Special	Dwelling Special
Policy Premium	\$722.00	\$746.00	\$782.00
Actions	Select	Select	Select
Coverages that apply to all dwellings			
Coverages that apply per dwelling			
Additional Living Expense/Fair Rental Value	Yes 21635	Yes 21635	Yes 21635
Dwelling	Yes	Yes	Yes
Limit	216346	216346	216346

7

Once selecting the version, you will be placed back into the full submission where you can see you are on that specific version.

Policy Review

[< Back](#) [Next >](#) [Edit Policy Transaction](#) [Versions](#) [Bind Options](#) [Close Options](#)

Primary Named Insured

Address [Redacted]

County: Hamilton

Address Type: Home

Address Description

Policy Type: Dwelling Special

Policy Level Coverages

Description	Value
Subtotal	

Dwelling Level Coverages

Dwelling at 5439 Oak Ridge Dr, Willoughby, OH 44094-3139

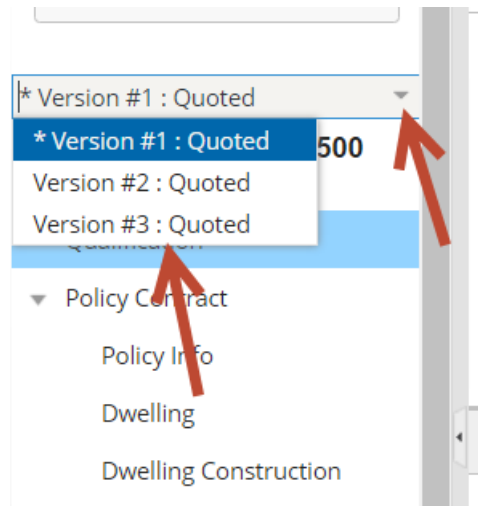
Property Coverages

Description	Value
Dwelling Coverage	
Limit	216,346
Settlement Option	Replacement Cost

Side by Side Versions

9

If necessary, you can quickly navigate back to the other versions by selecting the **Version Dropdown** and clicking on the appropriate version.



For questions about using AMsuite, contact American Modern's Customer Service Team @ 1-800-543-2644.

Performing Cancellation Transactions

This document provides the steps to guide you to successfully perform cancellation transactions.

- Cancel a Policy by Request
- Complete the Cancel Rewrite Process

Key Benefits

AMsuite is American Modern's state-of-the-art software solution. It consolidates the policy administration, claims and data applications into one platform for all Personal Lines products.

From motorcycles to manufactured homes, users will benefit from the same functionality, flow and flexible navigation. In a nut shell, AMsuite will make it easier for you to do what you do best—serve customers.

Cancel a Policy

1

To search for the policy, click the drop down arrow menu in the **Policy** tab.

2

Enter the Policy Number in the **Policy # field**. Click the **magnifying glass** icon.

If you have recently accessed this policy or transaction, it will display under the **Policy #** field. Click the policy number to access it.

3

Select **Cancel Policy** from the **Actions** menu.

4

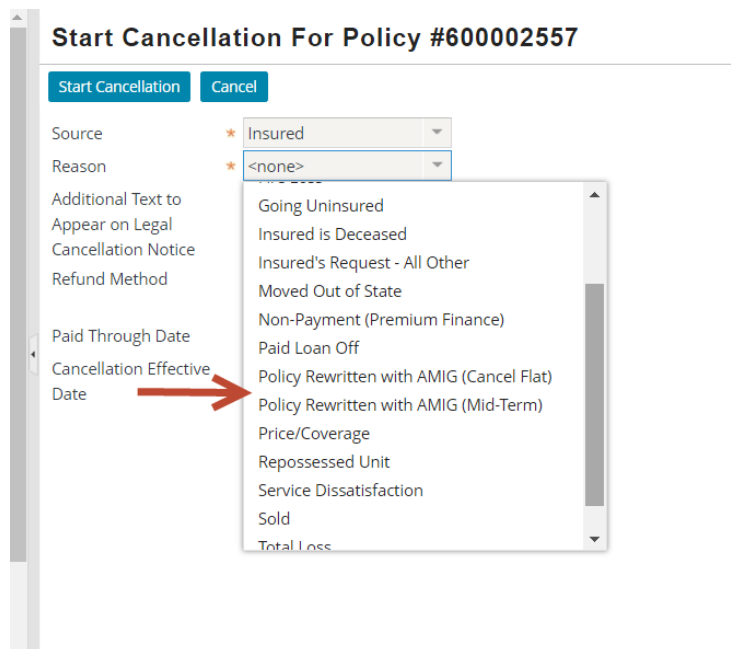
Enter the required information on the **Start Cancellation** page.

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Performing Cancellation Transactions

The two applicable reasons for a cancel rewrite are “Policy Rewritten with AMIG (Flat)” and “Policy Rewritten with AMIG (Mid-Term)”.

- A flat cancellation sets the cancellation date to the effective date of the current term.
- For mid-term cancels/rewrites, the effective date of the rewrite policy can only be the same date of the original policy’s cancellation. The rewrite cannot be created with an earlier or later effective date.



Start Cancellation For Policy #600002557

Start Cancellation Cancel

Source * Insured

Reason * <none>

Additional Text to Appear on Legal Cancellation Notice Refund Method

Paid Through Date

Cancellation Effective Date

Going Uninsured
 Insured is Deceased
 Insured's Request - All Other
 Moved Out of State
 Non-Payment (Premium Finance)
 Paid Loan Off
 Policy Rewritten with AMIG (Cancel Flat)
 Policy Rewritten with AMIG (Mid-Term)
 Price/Coverage
 Repossessed Unit
 Service Dissatisfaction
 Sold
 Total Loss

5 Click **Start Cancellation** at the top of the page.

6 Review the quote to make sure all information is correct.

Click **Bind Options**, then click **Issue Cancellation**.

7 When asked “Are you sure you want to cancel this policy?” click **OK**.

The **Cancellation Bound** page will open and you can see that your cancellation has been bound.

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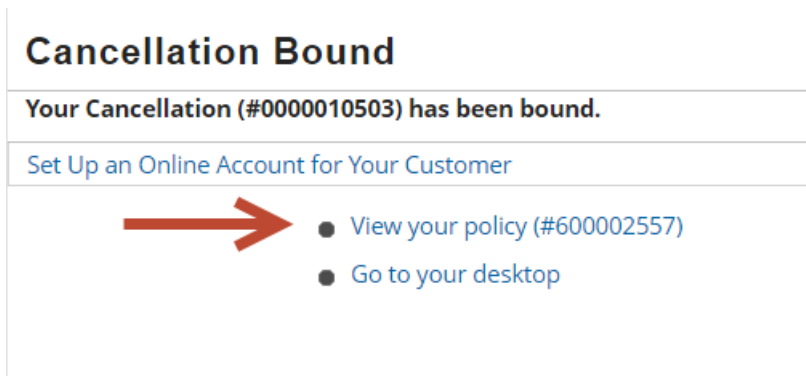
Performing Cancellation Transactions

If you are performing a cancel rewrite continue to “Complete the Cancel Rewrite Process”

Complete the Cancel Rewrite Process

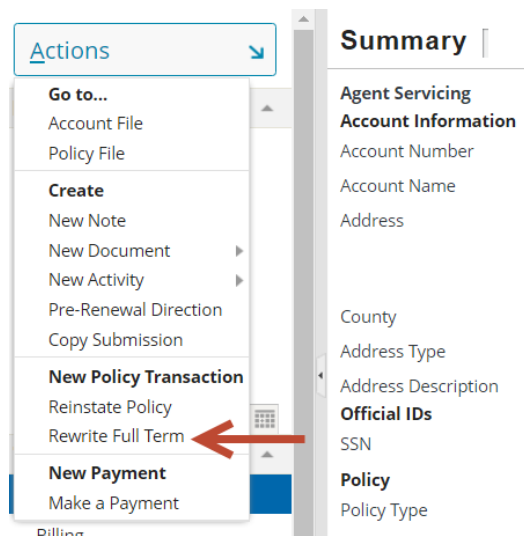
8

On the **Cancellation Bound** page, click **View your policy**.



9

Select **Rewrite Full Term** from the **Actions** menu on the **Policy Summary** page. This option is only available if you chose one of the cancel/rewrite options when cancelling the previous policy.



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Performing Cancellation Transactions

10

You need to review all pages of the policy and update any information that may have changed.

The effective date can be changed on the **Policy Info** page.



Policy Details

Previous Policy Number

Term Type

Term Number 3

Policy Type

Effective Date  

Expiration Date 02/02/2018

Rate as of Date

Rating State Ohio

Producer of Record

Producer Code

The **Policy Review** page compares the existing policy and the rewrite of the policy. Click “+” next to the folders titled to view more specific comparison details.

11

The system will prefill Bill the Down as **Yes**. This **Billing** information is carried over from the original policy. Click **Bind Options**, then click **Issue Policy**. When asked “Are you sure you want to bind and issue this policy?” click **OK**.

<input type="radio"/>	4 Pay	\$202.25	\$202.25	3	\$7.00	\$830.00
<input type="radio"/>	6 Pay	\$161.80	\$129.44	5	\$7.00	\$844.00

Payment Schedule Estimator

Down Payment Information

Bill the Down

12

The **Rewrite Bound** page will open and you can see that your rewrite has been bound.

For questions about using AMsuite, contact American Modern's Customer Service Team @ 1-800-543-2644.

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Accidents/Violations & MVR's

How to Remove Duplicated Accidents and Violations

Manually entered Accidents/Violations may become duplicates from system generated reports. These duplicates will not allow you to move forward in the policy process and need to be removed.

- 1 To remove these manually entered duplicates, **click** the “Accidents/Violations” tab.
- 2 Then click the checkbox next to the Manual submission, and click **Remove** to delete the duplicates.
- 3 Revisit the Drivers page and update the number of accidents and violations on the **Driver Experience** tab, so that the number matches the entries on the **Risk Analysis** page.

The screenshot shows the 'Risk Analysis' page in AMsuite. The 'Accidents/Violations' tab is selected. A red box highlights the 'Manual' entry in the 'Violations' table. A blue callout bubble contains the following text:

To remove any manually added Accidents/Violations first check the box of the manual added Accidents/Violations and then click remove.

Source	Occurrence Date	Description	Detail	Driver	Chargeable	Exclude
MVR	05/05/2015	<none>	<none>		Yes	<input type="radio"/> Yes <input type="radio"/> No
Manual					No	

Accidents/Violations & MVR's

How to View Motor Vehicle Records

The Motor Vehicle Records are only available after you proceed to issuance. To view the Motor Vehicle Record:

- 1 Select **Risk Analysis** from the left-hand navigation pain.
- 2 Click the **Motor Vehicle Records** tab on the Risk Analysis page.
- 3 Select the **MVR Report Details** button.



The screenshot shows the AMsuite interface for Risk Analysis. On the left is a navigation menu with 'Risk Analysis' selected. The main area has a 'Risk Analysis' header with a 'CLICK HERE TO LEARN MORE' button. Below the header are navigation buttons: '< Back', 'Next >', 'Quote', 'Quote(Demo)', 'Save Draft', 'Versions', and 'Withdraw Transaction'. There are also 'Add UW Issue' and 'Request Approval' buttons. A tabbed interface shows 'Motor Vehicle Records' as the active tab, highlighted with a red box. Below the tabs is a table with columns: Name, Gender, Age, License State, MVR Status, Report Date, # Accidents, # Violations, and Points. Two rows of data are visible. A red box highlights the 'MVR Report Details' button, with a callout box pointing to it that says 'MVR will become available once the policy quote is issued.'

Name	Gender	Age	License State	MVR Status	Report Date	# Accidents	# Violations	Points
[REDACTED]	Female	19	Ohio	Received	05/05/2015			
[REDACTED]	Male	42	Ohio	Received	05/05/2015			

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