


NAVIGATING THE CUIC WEB SITE



Casualty Underwriters Insurance Company
Personal Auto Insurance Coverage

Logged in as: Logout

Agent Tools

HOME

About CUIC Auto

Contact Us

Other Products

Agent Login

Welcome to Casualty Underwriters agent/broker home page.

Casualty Underwriters is striving to assist our brokers through this new internet format. Using "Agent Tools" you can inform us of payments taken at your office and the manner in which they will be remitted to Casualty. To "sweep" your account of the money remitted to you, you will first need to contact us for instructions on setting up your account routing.

We also have a client status option that shows all your current policies with Casualty:

- Active
- Lapsed and can be reinstated with a late fee
- Expired and must be rewritten
- Cancelled

Also using the online quoter you can quote applications and changes and bind them immediately to CUIC.


If you need some assistance, please use our "Contact Us" option above.

Agent ID:

Login:

Password:

Login



[About SSL Certificates](#)

1

TABLE OF CONTENTS

GETTING STARTED & LOGGING IN	3-4
AGENCY ADMINISTRATION	5-6
Manage Users	5
ACH Trust/Sweep Account Setup	6
Commission Statements	6
AGENT TOOLS	7-35
Client Status & Filters	8-17
Viewing Policy	8-9
Making a payment	10-12
Deleting payments (pg. 33)	12
Processing Policy Changes	13-16
Filing a Claim	17
Online Quoter	18-33
Starting a new quote	18-19
Adding Vehicles	20-23
Adding Drivers	24
Adding Violations	25-26
Adding Coverages	27
Processing from the Rate tab	28-33
Payment Summary	34
Documents Listing	35
News	35
Help / Forms	36
ABOUT CUIC AUTO	37
CONTACT US	38
OTHER PRODUCTS	38
NEWSLETTER	38
FREQUENTLY ASKED QUESTIONS	39-40

GETTING STARTED

- **Agent ID** is the Producer Code.
- The **Login** and **Password** are initially assigned by CUIC. The initial sign in information will need to be changed by the Administrator in the first 7 days or the account will be locked.
- An administrator is set up from the initial information provided. It is the administrator's responsibility to manage the users in the office.

CUIC

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Agent ID:

Login:

Password:

Login



[About SSL Certificates](#)

NOTE: As agents and agency staff use and work through the various tools of this website, they will see important messages typed in red. Please be cognizant of these messages as they are very important. There is always a reason for seeing these messages. They may be disclaimers, warnings, or information to pass on to your client.

After logging in, the **Agent Home Page** will appear.

CUIC

Casualty Underwriters Insurance Company
Personal Auto Insurance Coverage

Logged in as: Logout

You have 1 unread document(s) marked as Important. [Click here](#) to view the documents.

Agent Tools

HOME

About CUIC Auto

Contact Us

Other Products

Newsletter

Agent Home Page

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[Click here to read the new CUIC Newsletter](#)

Hello Curtis Hedrick!

Welcome to the Casualty Underwriters Insurance Company Agent Management System.



Most of the information needed is under the **Agent Tools** drop down and the **Agency Administration** bar at the bottom of the page.

CUIC

Casualty Underwriters Insurance Company
Personal Auto Insurance Coverage

Logged in as: Logout

You have 23 unread document(s) marked as Important. [Click here](#) to view the documents.

Agent Tools

HOME

About CUIC Auto

Contact Us

Other Products

Newsletter

Agent Tools

Client Status

Online Quoter

Payment Summary

Documents Listing

News

Help / Forms

ays your clients' policy information, the current premium due and the due date. You can expand the (ed or excluded), all covered vehicles and the current address on record.


o access quotes done previously and saved as well as to bind and upload coverage.

e will display the recent payment history, with the payment detailed by method of remittance to CUIC.

ard payment you are moved to a page that will display information necessary to process the credit card payment.

Policy Document Listing - This page will display important documents posted for policies.

Help / Forms - Helpful answers to frequently asked questions as well as Underwriting Guidelines, Policy and supplemental forms.

 Reports generated on this web site use the Adobe PDF format. If you do not already have Adobe Reader, click [here](#) to download the most recent version. If you are using a version prior to 7.0 we recommend downloading a more current version. There are features in the newer versions that allow PDF files to be opened much quicker.

Agency Administration

Manage Users

Commission Statements

ACH Trust/Sweep Account Setup

Agency Administration:

REQUIREMENTS Reports generated on this web site use the Adobe PDF format. If you do not already have Adobe Reader, click [here](#) to download the most recent version. If you are using a version prior to 7.0 we recommend downloading a more current version. There are features in the newer versions that allow PDF files to be opened much quicker.

Agency Administration

[Manage Users](#) [ACH Trust/Sweep Account Setup](#)

[Commission Statements](#)

Manage Users – allows for adding & editing office staff that will need to log into the CUIC website.

This is where the administrator starts after being first appointed or, if the office has moved this is where the changes need to be made.

- Fill in all boxes that have red stars and click on the **Save** button. The new user will show up on the **Current Users** grid.
- To change information for an existing user, select the **Edit** button next to the user **Email** box in the **Current Users** grid. After changing the information click on the **Save** button.
- To exit, click on the **Agent Tools** tab.

CUIC Casualty Underwriters Insurance Company
Personal Auto Insurance Coverage

Logged in as: Test Tester CASUALTY UNDERWRITERS INS CO Logout

Agent Tools **HOME** **About CUIC Auto** **Contact Us** **Other Products**

User Management

Add User

Items marked with a ★ are required fields.

First Name: ★ Address: ★

Last Name: ★

Login: ★ City: ★

Password: ★ State: ★

Confirm Password: ★ Zip: ★

Company: ★ Phone: ★

Agency: 00002 Email: ★

Agency Admin: ☐ (User Administrator)

Save

Current Users

Go to Page 1 Records 1 - 1 of 1							
First Name	Last Name	Login	CUIC Admin	Agent Admin	ProducerID	Email	
Test	Tester	Tester	No	Yes	00002	junk@iai-online.com	Edit / Delete

Go to Page 1 Records 1 - 1 of 1

ACH Trust/Sweep Account Setup – Administrator function to add Trust Account information for sweeping premium payments. This information is encrypted and cannot be seen by CUIC.

- If the account number changes, go to this function to complete the change.
 - Please read the information in red on this page.

ACH Account Setup

Routing # (9 digits) Account # Check #

⎵ ⎵ ⎵

⎵ ⎵ ⎵

TRANSIT SYMBOL ON US SYMBOL

Account Name:

Routing Number:

Account Number:

Account Type:

Your account numbers are not being displayed for security purposes, but are currently being stored by our system. Please fill out the form completely if you wish to make changes to a your account information.

If you are changing the account numbers, payments submitted before this change will still use the previous account number. All payments submitted after making this change will pull from the new account.

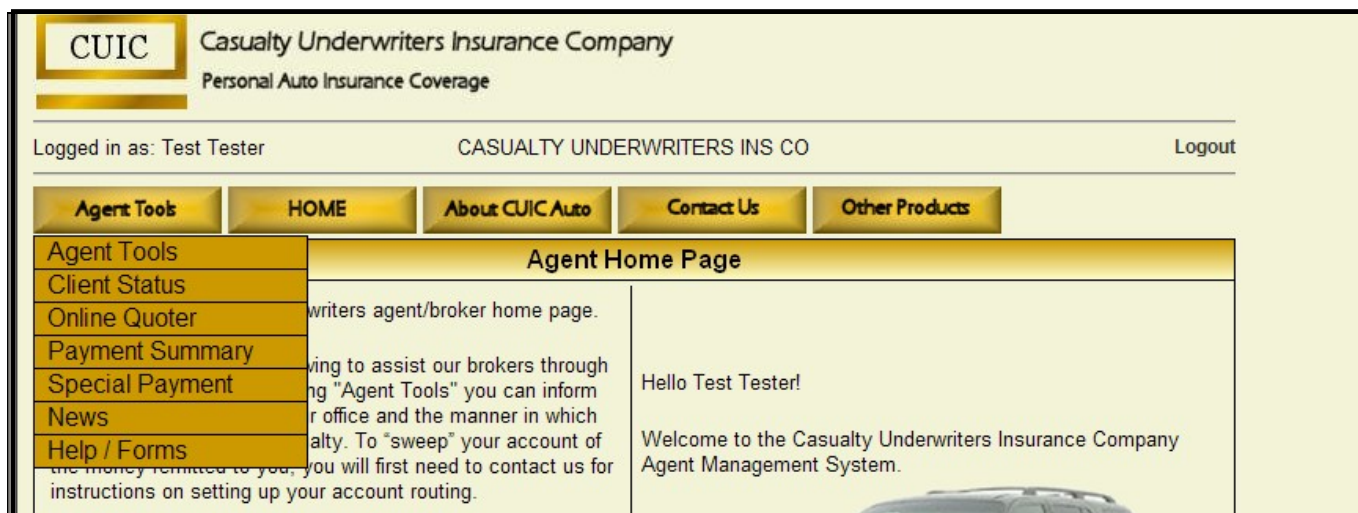
Commission Statements: The commission statements are readily available through the website.

- Commissions are paid every Tuesday and the statement is uploaded to the agency account. Click on the **View** button to review the statement. An email will be sent to inform the agency when these statements are ready for review.
- Any **MVR Charges** can also be viewed. To avoid any MVR chargebacks an agency must do the following:
 - Bind 50% of MVR pulls.
 - Bind at least 10 applications in any given month.

Agent Tools	HOME	About CUIC Auto	Contact Us	Other Products	Newsletter
Commission Statement History					
From	To	Report Date			
11/27/2018	12/03/2018	12/04/2018	View	MVR Charges	
11/20/2018	11/26/2018	11/27/2018	View	MVR Charges	
11/13/2018	11/19/2018	11/20/2018	View	MVR Charges	
11/06/2018	11/12/2018	11/13/2018	View	MVR Charges	
10/30/2018	11/05/2018	11/06/2018	View	MVR Charges	
10/23/2018	10/29/2018	10/30/2018	View	MVR Charges	
10/16/2018	10/22/2018	10/23/2018	View	MVR Charges	
10/09/2018	10/15/2018	10/16/2018	View	MVR Charges	
10/02/2018	10/08/2018	10/09/2018	View	MVR Charges	
09/25/2018	10/01/2018	10/02/2018	View	MVR Charges	

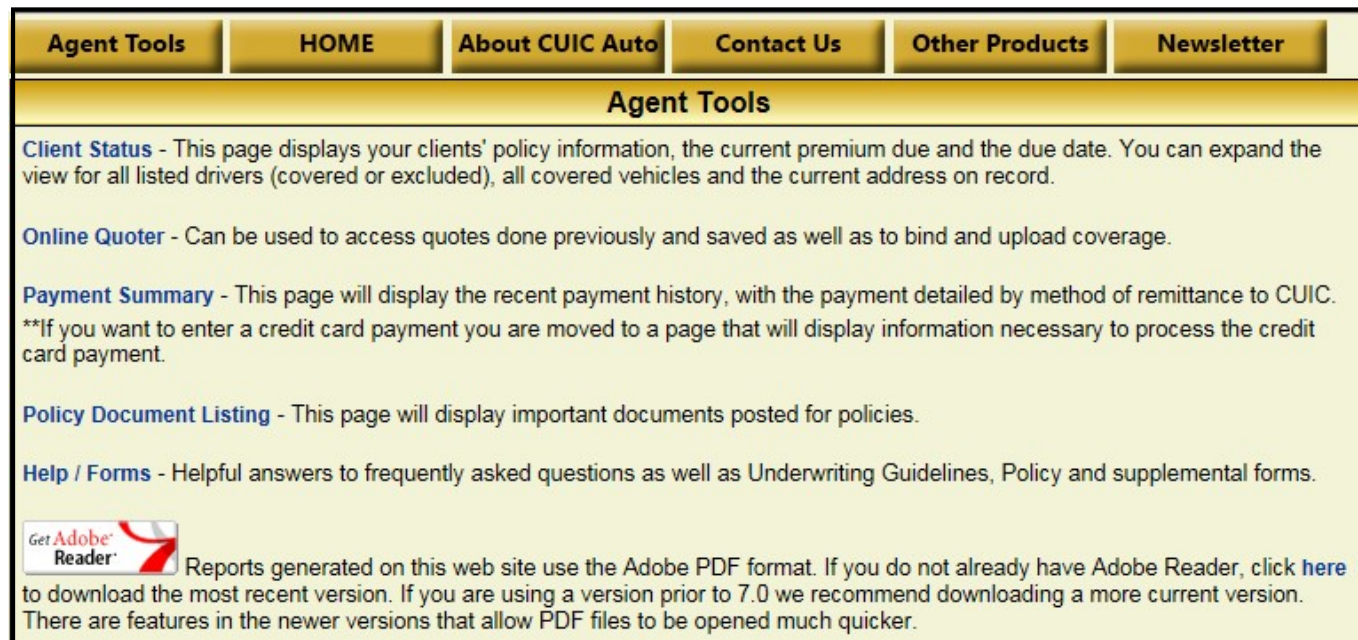
Agent Tools:

Once in the site, most of the information needed will be under the **Agent Tools** drop down.



The screenshot shows the CUIC (Casualty Underwriters Insurance Company) website. The header includes the CUIC logo and the text "Casualty Underwriters Insurance Company" and "Personal Auto Insurance Coverage". Below the header, it says "Logged in as: Test Tester" and "CASUALTY UNDERWRITERS INS CO" with a "Logout" link. A navigation bar contains buttons for "Agent Tools", "HOME", "About CUIC Auto", "Contact Us", and "Other Products". The "Agent Tools" dropdown menu is open, showing options: "Agent Tools", "Client Status", "Online Quoter", "Payment Summary", "Special Payment", "News", and "Help / Forms". The main content area is titled "Agent Home Page" and contains a welcome message: "Hello Test Tester!" and "Welcome to the Casualty Underwriters Insurance Company Agent Management System." There is also a small image of a car at the bottom right.

This section defines the different options that are available on the drop down.



The screenshot shows the "Agent Tools" page. The navigation bar includes buttons for "Agent Tools", "HOME", "About CUIC Auto", "Contact Us", "Other Products", and "Newsletter". The main content area is titled "Agent Tools" and contains descriptions for several tools:

- Client Status** - This page displays your clients' policy information, the current premium due and the due date. You can expand the view for all listed drivers (covered or excluded), all covered vehicles and the current address on record.
- Online Quoter** - Can be used to access quotes done previously and saved as well as to bind and upload coverage.
- Payment Summary** - This page will display the recent payment history, with the payment detailed by method of remittance to CUIC. **If you want to enter a credit card payment you are moved to a page that will display information necessary to process the credit card payment.
- Policy Document Listing** - This page will display important documents posted for policies.
- Help / Forms** - Helpful answers to frequently asked questions as well as Underwriting Guidelines, Policy and supplemental forms.

At the bottom, there is a "Get Adobe Reader" button and a message: "Reports generated on this web site use the Adobe PDF format. If you do not already have Adobe Reader, click [here](#) to download the most recent version. If you are using a version prior to 7.0 we recommend downloading a more current version. There are features in the newer versions that allow PDF files to be opened much quicker."

Client Status – Displays the insured’s policy information. There are many filtering features that can be completed from this screen.

Agent Tools	HOME	About CUIC Auto	Contact Us	Other Products	Newsletter				
Client Status Report									
Policy ID: <input type="text"/>		Named Insured: <input type="text"/>							
Status: <input type="text" value="Active"/>		Due on or After: <input type="text"/>							
Bill Type: <input type="text"/>		Due on or Before: <input type="text"/>							
Agent ID: <input type="text"/>									
		<input type="button" value="Filter Policies"/>		<input type="button" value="Clear Filter"/>					
		<input type="button" value="Print Report"/>							
Go to Page 1 Records 1 - 1 of 1									
	Policy ID	Named Insured	Phone	Due Date	Status	Min Payment			
View	CUICD-			10/14/2019	ACTIVE	\$130.94	Pay	Changes	Claims
Go to Page 1 Records 1 - 1 of 1									

- **Policy ID:** Type in the 5 numbers associated with the policy number and click the Filter button. Click on the [View](#) button in order to go to the policy information screen.
 - ✓ This message is at the top of the web page to alert you to important documents that need to be reviewed.
You have 67 unread document(s) marked as Important. Click [here](#) to view the documents.
- **Status:** By clicking on the drop-down arrow you can navigate the following policy information.
 - ✓ Active
 - ✓ All
 - ✓ Cancelled
 - ✓ Expired
 - ✓ Lapsed
 - ✓ NOC / Non-Renewal
- **Bill Type:** Direct or Recurring (ACH/CC)
- **Agent ID:** If there is more than one ID for your agency.
- **Named Insured:** Filter by last name.
 - ✓ A PDF report can be printed based off the filtering selections.
- **Due on or After/Before:** Filter by date ranges.
- The information can be filtered by clicking on the button.

View – allows the user to see the policy information & activity by scrolling down the page; insured information, policy information, payment history, claim filing & history, document uploads, any correspondence that has been sent to the insured, and miscellaneous request forms that can be printed for that policy.

Go to Page 1 Records 1 - 1 of 1		
	Policy ID	Named Insured
View	CUICD-	
Go to Page 1 Records 1 - 1 of 1		

- You will be taken to this screen after the **View** button is clicked. Additional information can be viewed as you scroll down the page. The blue links allow you to do certain tasks. Click the **<< Back** button to return to the **Client Status Report**.

Agent Tools	HOME	About CUIC Auto	Contact Us	Other Products	Newsletter			
Policy Information								
Policy ID: CUICD- Status: ACTIVE		Named Insured: Payment Due Date: 11/30/2020 Expiration: 12/01/2020 Original Issue Date: 12/01/2014 Work Phone: Mailing Address:						
Producer: Home Phone: Physical Address:								
Policy Billing								
No Bill is currently due. The next bill will look as follows: Payment Due Date: 11/30/2020 Minimum Payment & Fee: 18.00								
Fee: 9.00 Late Fee: 0.00 NSF Fee: 0.00 SR22 Fee: 0.00 Total Fees: 9.00								
Policy Drivers								
Driver Name	License	DOB	Status	Points	SR22			
		09/18/1963	Covered	1	No			
Liability Coverages								
BI: 25/65 PD: 15 MP: None PIP: Basic			UIM: No UI: None					
Policy Vehicles / Coverages								
Model Year	Make	Model	VIN	Coll	Comp	Towing	UMPD	AddEquip
2014	FORD	TAURUS SE	1FAHP2D93EG153320	Declined	Declined	No	No	No

- Click on the green **Pay**, **Changes**, and **Claims** buttons to service individual policies.

Agent Tools	HOME	About CUIC Auto	Contact Us	Other Products	Newsletter				
Client Status Report									
Policy ID: <input type="text"/> Status: Active <input type="button" value="v"/> Bill Type: <input type="button" value="v"/> Agent ID: <input type="text"/>		Named Insured: <input type="text"/> Due on or After: <input type="text"/> Due on or Before: <input type="text"/>							
<input type="button" value="Filter Policies"/> <input type="button" value="Clear Filter"/> <input type="button" value="Print Report"/>									
Go to Page 1 Records 1 - 1 of 1									
<input type="button" value="View"/>	Policy ID	Named Insured	Phone	Due Date	Status	Min Payment	<input type="button" value="Pay"/>	<input type="button" value="Changes"/>	<input type="button" value="Claims"/>
				10/14/2019	ACTIVE	\$130.34			
Go to Page 1 Records 1 - 1 of 1									

Pay – allows the agent to make a payment from this screen.

- ✓ Make sure to *verify* the **policy number**, insured's **name & address** prior to processing payments.
- ✓ Verify the amount due.

Agent Tools	HOME	About CUIC Auto	Contact Us	Other Products	Newsletter
<< Back		Payment Notification		<< Back	
The last payment was posted to the policy on 09/16/2019 for \$185.18.					
Payment Method: <input type="button" value="v"/>					
Payment Amount: <input type="text"/>					
Agent: <input type="text" value="NS INS AGCY INC"/>					
<input type="button" value="Submit Payment"/>					
Policy Information					
Policy ID: CUICD-			Named Insured:		
Status: ACTIVE			Payment Due Date: 10/14/2019		
Home Phone: <input type="text"/>			Expiration: 10/15/2019		
Physical Address: <input type="text"/>			Work Phone: <input type="text"/>		
			Mailing Address: <input type="text"/>		
Policy Premiums					
Policy Currently Paid To: 10/15/2019					
Policy Billing					
Current Billing Due:					
Fee: 9.00			Minimum Payment & Fee: 130.94		
Late Fee: 0.00					
NSF Fee: 0.00					
SR22 Fee: 0.00					
Total Fees: 9.00			Full Payment & Fee: 740.60		

- ✓ Select the **Payment Method** by clicking on the button.

Agent Tools	HOME	About CUIC Auto	Contact Us	Other Products	Newsletter
<< Back		Payment Notification		<< Back	
The last payment was posted to the policy on 09/16/2019 for \$185.18.					
Payment Method: <input type="button" value="v"/>					
Payment Amount: <input type="text"/>					
Agent: <input type="text" value="NS INS AGCY INC"/>					
<input type="button" value="Submit Payment"/>					


The following screen will appear. Completely fill in the CC holder information and click on the button.



Submit Payment

Agent Tools	HOME	About CUIC Auto	Contact Us	Other Products	Newsletter
Payment Notification					
<< Back					
The last payment was posted to the policy on 09/16/2019 for \$100.00					
Payment Method: Credit Card					
Cardholder's Name:					
Billing Address (Line 1):					
Billing Address (Line 2):					
City:					
State:					
Zip Code:					
Payment Amount:					
Agent:					
Submit Payment					

- ✓ The next screen will appear.
- ✓ Confirm the payment amount is correct.
- ✓ Click on the [Confirm Payment](#) button.

Agent Tools	HOME	About CUIC Auto	Contact Us	Other Products	Newsletter
Payment Notification					
<< Back					
Payment Method: Credit Card					
Cardholder's Name:					
Payment Amount:					
Confirm Payment Make Changes					
When you click the [Confirm Payment] button, you will be taken to a 3rd party payment provider to confirm the transaction.					
Policy Information					
Policy ID: CUICD-78524					
Status:					
Cancel Reason:					
Home Phone:					
Physical Address:					
Named Insured:					
Payment Due Date:					
Expiration: 08/07/2019					
Work Phone:					
Mailing Address:					

- ✓ Confirm the card number with the insured.
- ✓ Type in the Expiration Date and Security Code and click on the  button.
- ✓ A box will appear that will say if the payment was approved.

- ✓ If the payment is accepted the following screen will appear.
- ✓ Hit the  button and hand the insured a copy. If they call the payment in ask if they want the confirmation # or copy of the receipt. They may want a copy either by postal mail or email.
- ✓ When finished click on the  button.

NOTE: *If the payment has been declined, the system will default back to the **Payment Notification** screen with a message in red saying the payment was declined.*

12

MAKING CHANGES TO ACTIVE POLICIES

Changes – Click on the green Changes button; goes to the *CUIC Quoter* screen to make policy changes.

- ✓ Click on the tab where the change will occur
- ✓ This is a good opportunity to confirm with the insured that all information is correct on the policy.

Create a Quote CUICD-

Insured First Name:
Insured Middle Name:
Insured Last Name:
Attention of:

Garaging Address
Garage Address:
Place any Unit (Apt, Ste, Trlr, etc.) Numbers below. Do not specify the Unit type.
Apartment / Suite / Lot #:
Zip Code:
City: **Copy Address >>**
State:

Mailing Address
Mail Address:
Place any Unit (Apt, Ste, Trlr, etc.) Numbers below. Do not specify the Unit type.
Apartment / Suite / Lot #:
Zip Code:
City:
State:
Phone Number: () - Ext
Save and Continue >>

- ✓ The **Vehicles & Drivers** tabs will have blue link buttons that will allow for changes.

Add a Vehicle CUICD-

Year	Make	Model	AE Value	Add Additional Equipment	Loss Payee/Add Int	Edit	Remove
2014	Honda	CIVIC LX	0.00	Add Additional Equipment	Loss Payee/Add Int	Edit	Remove
2003	Toyota	COROLLA CE/S/LE	0.00	Add Additional Equipment	Loss Payee/Add Int	Edit	Remove

Add a Vehicle

Please add any Lienholders before hitting Continue.

Continue >>

Add a Driver CUICD-

First Name	Middle Name	Last Name	Edit	Drop Driver
<input type="text"/>	<input type="text"/>	<input type="text"/>	Edit	Drop Driver

Add Driver

Add Past Drivers License Numbers

Continue >>

- ✓ If adding a new rated or excluded for suspended driver, a new **MVR** and **Claims Report** will need to be pulled.

First Name	Last Name	Number of Violations	Points	
		1	0	Violation for this Driver

Continue >>

Automatic MVR Reporting

MVR Reporting Status

First Name	Last Name	State	MVR Status
------------	-----------	-------	------------


Claim Reporting Status

First Name	Last Name	Claim Report Status
------------	-----------	---------------------

Pull MVR **Pull Claims Report**

NOTE: MVRs will not be pulled for existing drivers on change quotes.


First Name	Last Name	TransactionMessage	MVRTransactionCode	MVRTransactionDate
TransactionMessage		ClaimTransactionCode	ClaimTransactionDate	


✓ For coverage changes, simply click on the  box and select the desired coverage.


NOTE: If adding comprehensive, collision, or UMPD, photos of the vehicle and proof of ownership will need to accompany the change request.


Select Coverages	CUICD-
------------------	--------


Save and Continue >>

Bodily Injury (BI): 25/65 


Property Damage (PD): 25 


Personal Injury Protection (PIP): Basic 


Uninsured Motorist Bodily Injury (UI): 25/65 


Underinsured Motorist Bodily Injury (UIM): 25/65 


Coverages for 2003 Toyota COROLLA CE/S/LE

Uninsured Motorist Property Damage (UMPD): 3500 


Comprehensive (COMP): Declined 


Collision (COLL): Declined 


Towing / Labor (TL): No  Coverage not available on vehicle of this age.


Additional Equipment (AE): No 


Coverages for 2014 Honda CIVIC LX

Uninsured Motorist Property Damage (UMPD): No 

Comprehensive (COMP): 200 

Collision (COLL): 500 

Towing / Labor (TL): No 

Additional Equipment (AE): No 

Save and Continue >>

- ✓ As with the new quotes, the Rate tab will look similar. The differences are the **red** information and warning statements.

NOTE: Please pay special attention to the information in **RED** as this is vital information pertaining to the insured and policy.

Start	Vehicles	Drivers	Violations	Coverages	Rate	Exit Quote
Policy Rating						CUICD-
<p>This policy is on a recurring payment method. If no change payment is collected, the amount withdrawn for the next recurring transaction will be adjusted based on this change.</p> <p>Make Changes Effective: 10 / 07 / 2019</p> <p>Select Payment Amount to Bind Coverage: \$0.00 --- No Payment Collected --- Policy expires on 10/17/2019 if outstanding bill not paid. ▼</p> <p style="color: red; text-align: center;">Please inform the Insured of the following:</p> <p style="color: red;">The outstanding bill on this policy will still be owed based on the payment option selected. \$217.32 is still owed. Policy will cancel on 10/17/2019 if additional payment is not made. No further billing notice will be sent unless additional money is collected. If no money is collected with this change, the due date of the policy may change.</p> <p>Additional money may be collected after a payment option has been selected. Simply increase the payment amount on the payment screen when directed there at binding time.</p> <p style="text-align: center;">For more information on Change Payments, see the Change Payments Guide.</p> <p>Every effort has been made to calculate these rates accurately. We reserve the right to change this premium based on unforeseen errors and/or additional information.</p>						
Underwriting and Binding						

- ✓ Select the payment amount option from the drop down button. This will show the payment options to be selected; what will be needed for the change to keep the policy effective and paid to date.

<p>This policy is on a recurring payment method. If no change payment is collected, the amount withdrawn for the next recurring transaction will be adjusted based on this change.</p> <p>Make Changes Effective: 10 / 07 / 2019</p> <p>Select Payment Amount to Bind Coverage:</p>		<p>\$0.00 --- No Payment Collected --- Policy expires on 10/17/2019 if outstanding bill not paid.</p> <p>\$217.32 --- Payment for current bill with change --- Policy expires on 11/16/2019</p>
<p style="color: red; text-align: center;">Please inform the Insured of the following:</p> <p style="color: red;">The outstanding bill on this policy will still be owed based on the payment option selected. \$217.32 is still owed. Policy will cancel on 10/17/2019 if additional payment is not made. No further billing notice will be sent unless additional money is collected. If no money is collected with this change, the due date of the policy may change.</p> <p>Additional money may be collected after a payment option has been selected. Simply increase the payment amount on the payment screen when directed there at binding time.</p> <p style="text-align: center;">For more information on Change Payments, see the Change Payments Guide.</p> <p>Every effort has been made to calculate these rates accurately. We reserve the right to change this premium based on unforeseen errors and/or additional information.</p>		
Underwriting and Binding		

- The **Underwriting and Binding** portion of the rating page shows what the premium will be after the change.
- It will also show the **Policy Rating Detail** and any changes in coverage rates.
- After the payment has been selected proceed by clicking on the **Bind Changes** button and repeat the steps from the **Online Quoter** section (Rate Tab pg 28).
- The change will be forwarded to the CUIC system for processing.

Underwriting and Binding							
Payment Type	Premium	Fees	Total				
8 Month Full Payment	\$67.00	\$8.00	\$86.00				
Monthly Installment	145.00	\$8.00	164.00				
	1 Month	6 Month					
Original Premium (No Fees):	\$41.00	\$246.00					
Premium After Change (No Fees):	\$145.00	\$857.00					
Current Outstanding Bill:							
Paid Thru: 04/26/2010							
Current Billed Term: 10/27/2009 - 11/26/2009							
Underwriting Information							
Bind Changes		Print Quote					
View / Attach Documents							
Policy Rating Detail							
Make	Model	First Name	Last Name	Coverage	Limit / Deductible	Rate	Monthly Rate
CHEVY	S-10			UMPD	No	0.00	0.00
				BI	25/50	77.00	13.00
				PD	15	\$1.00	16.00
				MP	None	0.00	0.00
				UI	25/50	25.00	4.00
				UIM	25/50	23.00	4.00
				COMP	Declined	0.00	0.00
				COLL	Declined	0.00	0.00
				TL	No	0.00	0.00
				AE	No	0.00	0.00
Dodge	NEON E 3/NEON 3XT			BI	25/50	73.00	12.00
				PD	15	\$7.00	16.00
				MP	None	0.00	0.00
				UI	25/50	25.00	4.00
				UIM	25/50	23.00	4.00
				COMP	600	110.00	19.00
				COLL	600	\$23.00	66.00
				TL	No	0.00	0.00
				AE	No	0.00	0.00
Total						\$67.00	145.00

NOTE: Please see the **CHANGE PAYMENT GUIDE** in Agent Tools > Help / Forms for a more detailed explanation of the premium breakdown.

Claims – allows the agent to file a claim on behalf of the insured.

- ✓ Click on this button and the following page appears.
- ✓ Fill out all pertinent information and click the **File Claim** button.
- ✓ The information is sent to our claims department for processing.

The screenshot shows a web form titled "File a Claim". At the top, there are navigation tabs: "Agent Tools", "HOME", "About CUIC Auto", "Contact Us", "Other Products", and "Newsletter". The form fields are as follows:

- Policy Number: CUICD-44883
- Reporting Party: [text box]
- Relationship to Insured: [text box]
- Date of Loss: [MM/DD/YYYY format]
- Driver Involved: [dropdown menu]
- Phone Number: [text box with area code and number]
- Email Address: [text box]
- Police Report #: [text box]
- Vehicle Involved: [dropdown menu]
- Current Vehicle Location: [text box]
- Location of Accident: [text box]
- Description of Accident: [large text box]
- Other Party Name: [text box]
- Other Party Address: [text box]
- Other Party City/State/Zip: [text box]
- Other Party Phone Number: [text box]
- Other Party Carrier: [text box]
- Other Party Policy Number: [text box]
- Other Party Vehicle(s) Make/Model/Year or Property: [large text box]

A "File Claim" button is located at the bottom right of the form.

- ✓ Claims can also be filed by clicking on the blue **View** button from the **Client Status Report** page. Scroll down in the Client View screen until you see the **File a Claim** bar.
- ✓ Click on the blue **Click here to file a claim** link and the same page as shown above will appear.

File a Claim							
Click here to file a claim.							
Claims							
Claim Number	Date Of Loss	Post Date	Insured Driver	Insured Vehicle	Open Claims	Total Claims	Total Paid

Online Quoter — Process to start new applications and bind coverages. Can be used to access and review prior quotes. *Once a quote has been bound no updates can be performed.*

Agent Tools	HOME	About CUIC Auto	Contact Us	Other Products	Newsletter
Agent Tools					
Agent Tools	ays your clients' policy information, the current premium due and the due date. You can expand the				
Client Status	ed or excluded), all covered vehicles and the current address on record.				
Online Quoter					
Payment Summary	o access quotes done previously and saved as well as to bind and upload coverage.				
Documents Listing	will display the recent payment history, with the payment detailed by method of remittance to CUIC.				
News	ard payment you are moved to a page that will display information necessary to process the credit				
Help / Forms					
Admin Console					

- The following page will appear.
 - ✓ Click on the “**Start a New Quote**” button to begin quoting a new application.

CUIC Quoter Home									
Start a New Quote									
<< Prev Next >> Records 1 - 0 of 0									
Quote ID	Policy ID	First Name	Last Name	Status	Date	Bound	Processed		
<< Prev Next >> Records 1 - 0 of 0									
Insured/Driver Last Name:							Status: -		
Policy ID:							Quote ID:		
Set Filter				Clear Filter					

- The next screen will appear. Just click on each tab left to right and follow the instructions to complete the quote. The fields must be filled in before going to the next tab. Click the **Continue >>** when ready to resume to the next tab.

NOTE: *Throughout the quoting process there will be help links and information to assist you.*

Start	Vehicles	Drivers	Violations	Coverages	Rate	Exit Quote
Create a Quote						
Garaging Zip Code: <input type="text"/>						
Continue >>						
Printable Help						
ADDRESS HELP						
Open Address Help						

- After putting in the Garaging Zip Code and hitting the Continue button, the following screen will appear. This will be the **Start** tab.
 - ✓ Fill out all the fields that apply. The ones with white background do not have to be completed. Click on the **Save and Continue >>** button.
 - ✓ This will prompt the system to go to the next tab or the **Vehicles** tab if the address is verified.

Create a Quote

Insured First Name:

Insured Middle Name:

Insured Last Name:

Attention of:

Garaging Address

Garage Address:

Place any Unit (Apt, Ste, Trlr, etc.) Numbers below. Do not specify the Unit type.

Apartment / Suite / Lot #:

Zip Code:

City: **Copy Address >>**

State: UT

Mailing Address

Mail Address:

Place any Unit (Apt, Ste, Trlr, etc.) Numbers below. Do not specify the Unit type.

Apartment / Suite / Lot #:

Zip Code:

City:

State:

Phone Number: () - Ext

Save and Continue >>

- ✓ The system will give a warning message for address errors. Verify the address is correct.
- ✓ There are two options to choose from.
 - The address can be edited.
 - Or, you can override the system and save as is.

Create a Quote

Address errors may affect the accuracy and/or the availability of reports for: MVRs, Claims, Credit and Undisclosed Drivers.

Address match not found or address is undeliverable.

The Input Mailing Address was:

1234 W DISNEY LN S
NORTH SALT LAKE UT 84054

Edit Address >> **Override DPV, Save As-Is >>**

[Printable Help](#) **ADDRESS HELP** [Open Address Help](#)

- Once the Override button has been selected, the system will be prompted to go to the **Vehicles** tab.

Vehicles

Tab

- Click on the **Add Vehicle by VIN**. Type in the VIN Number and the system will match the vehicle to that VIN.

Start Vehicles Drivers Violations Coverages Rate Exit Quote

MICKEY MOUSE

Add a Vehicle

Year	Make	Model	AE Value			
<div style="border: 1px solid black; padding: 5px; display: inline-block;">Add Vehicle by VIN</div>						
Year: -	Make: ▾	Model: ▾				
	Body Style: ▾					
Antilock Brakes:						
Airbags:						
Turbo:						
Own or Lease: -						
Symbol: /						
<div style="border: 1px solid black; padding: 5px; display: inline-block;">Save Vehicle</div>						

Mike Mouse

Add a Vehicle

Year	Make	Model	AE Value			
VIN Number: 19UUA8F5XAA024027						
<div style="display: flex; justify-content: center; gap: 10px;"> <div style="border: 1px solid black; padding: 5px;">Lookup By VIN</div> <div style="border: 1px solid black; padding: 5px;">Cancel</div> </div>						

Mike Mouse

Add a Vehicle

Year	Make	Model	AE Value			
VIN Number: 19UUA8F5XAA024027						
Year: 2010						
Make: ACUR						
Model: TL						
Body Style: SEDAN 4D						
Antilock Brakes: Yes						
Airbags: Yes						
Turbo: No						
Own or Lease: -						
Symbol: 19						
<div style="border: 1px solid black; padding: 5px; display: inline-block;">Save Vehicle</div>						

*****If the vehicle is a "LEASE" please select the Lease option*****

*****All others select "OWN" even if it has a lien holder*****

Turbo: ▾

Own or Lease: ▾

Symbol: ▾

Own
 Lease

NOTE: In 1981, the National Highway Traffic Safety Administration of the United States standardized the VIN format. It required all on-road vehicles sold to contain a 17-character VIN, which does not include the letters O (o), I (i), and Q (q) (to avoid confusion with numerals 0, 1, and 9).

- If the vehicle is a pre-1980 model, you will not be able to decode the **VIN**. Click on the drop-down arrow on the **Year**, scroll down to the bottom of the list and select the “**Pre-1980**” option.

The screenshot shows the 'Add a Vehicle' form in the Mickey Mouse system. The 'Year' dropdown menu is open, showing a list of years from 1988 down to 1980, with 'Pre-1980' at the bottom. A red box highlights the 'Pre-1980' option, and a red arrow points from the instruction text to it. The form includes fields for Year, Make, Model, AE Value, VIN Number, and various vehicle features like Antilock Brakes, Airbags, and Turbo. A 'Save Vehicle' button is at the bottom.

- The following page will appear.
- Fill out the vehicle information on this page.

NOTE: Do not fill in the VIN until after clicking the save vehicle button. If the vin is filled in prior you will receive an error message.

The screenshot shows the 'Add a Vehicle' form after clicking the 'Save Vehicle' button. The form is now populated with fields for VIN Number, Year, Make, Model, Body Style, Antilock Brakes, Airbags, Turbo, Own or Lease, and Symbol. A 'Cancel' button is now visible next to the 'Save Vehicle' button.

NOTE: There are other instances where the Pre-1980 option will need to be selected. If the VIN will not decode and the system says it is “Invalid” or some 1991 or older pickup trucks where the VIN will not decode. Call CUIC for assistance.

- Click on **Save Vehicle** once the **Vehicle** information has been entered.
- Click on the **Add a Vehicle** for each additional vehicle that needs to be added.

Mickey Mouse

Add a Vehicle

Year	Make	Model	AE Value				
2010	Acura	TL	0.00	Add Additional Equipment	Loss Payee/Add Int	Edit	Remove

Add a Vehicle

Please add any Lienholders before hitting Continue.

Continue >>

- To add **Additional Equipment** click on the **Add Additional Equipment** button. This is for any added equipment that did not come standard on the truck but was added as after market parts. **Modified suspension and engines or mural-type paint do not qualify for coverage.**
 - ✓ Fill in the description and value boxes. The premium is calculated using this information.
 - Provide support for the value through receipts or online valuations.
 - ✓ Click on **Save Additional Equipment**; this will take you back to the vehicle screen.

EDUARDO GONZALEZ

Add a Vehicle CUICD-84155

Year	Make	Model	AE Value				
2000	GMC	YUKON DENALI (CARRYOVER)	0.00	Add Additional Equipment	Loss Payee/Add Int	Edit	Remove

Add ons for 2000 GMC YUKON DENALI (CARRYOVER)

Description: Value:

Additional Equipment Description: Value:

Save Additional Equipment Cancel

- To add a lien holder click on the **Loss Payee/Add Int** link.
 - ✓ Select the **Type**
 - Loss Payee – loan institution that the vehicle is financed through.
 - Additional Interest – select this in addition to Loss Payee if vehicle is being leased or is a rent to own.
 - ✓ Fill out remaining boxes and click on the **Save Add Interest/Loss Payee**.

MICHAEL MOUSER

Add a Vehicle

Year	Make	Model	AE Value				
1979	CHEVROLET	K1500	2,500.00	Add Additional Equipment	Loss Payee/Add Int	Edit	Remove

Additional Interest for 1979 CHEVROLET K1500

Name: Address: City: State: Zip: Type:

Type: Loss Payee Additional Interest

Name: Address: City: State: Zip Code:

Save Add Interest/Loss Payee Cancel

- Click on the **Continue >>** button when all vehicles, additional equipment, and lien holder information have been entered. This will take you to the Drivers tab.

Start	Vehicles	Drivers	Violations	Coverages	Rate	Exit Quote	
Mickey Mouse							
Add a Vehicle							
Year	Make	Model	AE Value				
2010	Acura	TL	0.00	Add Additional Equipment	Loss Payee/Add Int	Edit	Remove
<div>Add a Vehicle</div> <p>Please add any Lienholders before hitting Continue.</p> <div>Continue >></div>							

Drivers Tab

- Fill out all boxes.
 - ✓ Check the Driver's License for effective date to determine if experience is more than 3 years or less.
 - ✓ If an SR-22 filing is needed, check this box. The proper rating will be added.
 - ✓ If the driver is to be excluded, send in a signed exclusion form.
 - ✓ Click on the Save Driver button to enter the driver on the quote.

Start	Vehicles	Drivers	Violations	Coverages	Rate	Exit Quote
MICHAEL MOUSER Add a Driver						
<div style="text-align: right; margin-bottom: 10px;">First Name: <input style="width: 150px;" type="text" value="MICHAEL"/></div> <div style="text-align: right; margin-bottom: 10px;">Middle Initial: <input style="width: 150px;" type="text"/></div> <div style="text-align: right; margin-bottom: 10px;">Last Name: <input style="width: 150px;" type="text" value="MOUSER"/></div> <div style="text-align: right; margin-bottom: 10px;">Date of Birth: <input style="width: 50px;" type="text" value="01"/> / <input style="width: 50px;" type="text" value="01"/> / <input style="width: 50px;" type="text" value="1980"/></div> <div style="text-align: right; margin-bottom: 10px;">SSN: <input style="width: 50px;" type="text" value="123"/> - <input style="width: 50px;" type="text" value="45"/> - <input style="width: 50px;" type="text" value="6789"/></div> <div style="text-align: right; margin-bottom: 10px;">State Licensed: <input style="width: 50px;" type="text" value="UT"/> <input style="width: 20px;" type="button" value="v"/></div> <div style="text-align: right; margin-bottom: 10px;">Current Drivers License: <input style="width: 150px;" type="text" value="123456789"/></div> <div style="text-align: right; margin-bottom: 10px;"> <input checked="" type="checkbox"/> Check here if the Driver has more than 3 years driving experience: </div> <div style="text-align: right; margin-bottom: 10px;">Months of Driving Experience: <input style="width: 150px;" type="text" value="N/A"/></div> <div style="text-align: right; margin-bottom: 10px;">Gender: <input style="width: 50px;" type="text" value="Male"/> <input style="width: 20px;" type="button" value="v"/></div> <div style="text-align: right; margin-bottom: 10px;">Marital Status: <input style="width: 50px;" type="text" value="Single"/> <input style="width: 20px;" type="button" value="v"/></div> <div style="text-align: right; margin-bottom: 10px;">SR 22 Filing Required: <input style="width: 50px;" type="text" value="Yes"/> <input style="width: 20px;" type="button" value="v"/></div> <div style="text-align: right; margin-bottom: 10px;">Excluded Driver: <input type="checkbox"/></div> <div style="text-align: right;"> Save Driver </div>						

- This brings up the following page.
- You can add drivers or add other license numbers for any added driver.
- Once all drivers have been listed click on the Continue >> button. This will take you to the Violations Tab.

Start	Vehicles	Drivers	Violations	Coverages	Rate	Exit Quote										
MICHAEL MOUSER Add a Driver																
<table border="1" style="width: 100%; border-collapse: collapse; margin-bottom: 10px;"> <thead> <tr> <th style="width: 25%;">First Name</th> <th style="width: 25%;">Middle Name</th> <th style="width: 25%;">Last Name</th> <th style="width: 20%;"></th> <th style="width: 5%;"></th> </tr> </thead> <tbody> <tr> <td>MICHAEL</td> <td></td> <td>MOUSER</td> <td>Edit</td> <td>Drop Driver</td> </tr> </tbody> </table> <div style="text-align: center; margin-bottom: 10px;"> Add Driver </div> <div style="text-align: center; margin-bottom: 10px;"> Add Past Drivers License Numbers </div> <div style="text-align: center;"> Continue >> </div>							First Name	Middle Name	Last Name			MICHAEL		MOUSER	Edit	Drop Driver
First Name	Middle Name	Last Name														
MICHAEL		MOUSER	Edit	Drop Driver												

Violations

Tab

- Click on the **Pull MVR** **Pull Claims Report** buttons.
 - ✓ Motor Vehicle Report – shows the status of the driver’s license and any moving violations.
 - ✓ Claims Report – will show prior accidents that have been reported in the name and DL number of the insured.

Start	Vehicles	Drivers	Violations	Coverages	Rate	Exit Quote										
MICHAEL MOUSER Add Violations																
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 20%;">First Name</th> <th style="width: 20%;">Last Name</th> <th style="width: 20%;">Number of Violations</th> <th style="width: 10%;">Points</th> <th style="width: 30%;"></th> </tr> </thead> <tbody> <tr> <td>MICHAEL</td> <td>MOUSER</td> <td>0</td> <td>2</td> <td>Violation for this Driver</td> </tr> </tbody> </table> <div style="text-align: center; margin-top: 5px;"> Continue >> </div>							First Name	Last Name	Number of Violations	Points		MICHAEL	MOUSER	0	2	Violation for this Driver
First Name	Last Name	Number of Violations	Points													
MICHAEL	MOUSER	0	2	Violation for this Driver												
Automatic MVR Reporting																
MVR Reporting Status																
First Name		Last Name		State	MVR Status											
MICHAEL		MOUSER		UT	Not Run											
Claim Reporting Status																
First Name		Last Name		Claim Report Status												
MICHAEL		MOUSER		Not Run												
Pull MVR Pull Claims Report																

- Once the reports have been pulled the status boxes will show either “**Pulled**” or “**In Process**”.
 - ✓ If they show pulled, any violations will be shown and points added.
 - ✓ Some states take 24hrs to pull so the status will show **In Process**.
 - Washington, Hawaii, California & Alaska.
 - ✓ There is a tracking grid below the pull buttons that will show the date/time and results of each pull made.

Automatic MVR Reporting				
MVR Reporting Status				
First Name		Last Name		State
				NC
				Pulled
Claim Reporting Status				
First Name		Last Name		Claim Report Status
				Pulled
Pull MVR Pull Claims Report				
First Name	Last Name	TransactionMessage	MVRTransactionCode	MVRTransactionDate
		MVR Request Made	REQMADE	8/10/2020 3:35:01 PM
		Response Request Made -- Pulled	RESPMADE	8/10/2020 3:35:07 PM
TransactionMessage		ClaimTransactionCode		ClaimTransactionDate
Claim Report Request Made		REQMADE		8/10/2020 3:35:11 PM
Claim Report Pulled Successfully		RESPMADE		8/10/2020 3:35:17 PM

- Once you have pulled the reports, click on the [Violation for this Driver](#) link.
- This will list all of the violations from the reports that have been pulled including points. SR-22 points do not show up on this screen.
- The Source box will show how the Violations were added, either from the **MVR** or the **User** (if agent enters information manually)
- Violations can be added by the user but only if there is support showing they exist (**not recommended**).
 - ✓ Click on the down arrow on the Violation box and select the violation type.
 - ✓ Type in the violation date from the support.
 - ✓ Click on the **Save Violation** button to add violations by user.

Start	Vehicles	Drivers	Violations	Coverages	Rate	Exit Quote														
MICHAEL MOUSER																				
<div> <div>Add Violations</div> <table border="1"> <thead> <tr> <th>First Name</th> <th>Last Name</th> <th>Number of Violations</th> <th>Points</th> <th></th> </tr> </thead> <tbody> <tr> <td>MICHAEL</td> <td>MOUSER</td> <td>0</td> <td>2</td> <td>Violation for this Driver</td> </tr> </tbody> </table> </div>							First Name	Last Name	Number of Violations	Points		MICHAEL	MOUSER	0	2	Violation for this Driver				
First Name	Last Name	Number of Violations	Points																	
MICHAEL	MOUSER	0	2	Violation for this Driver																
<div> <div>Violations For MICHAEL MOUSER</div> <table border="1"> <thead> <tr> <th>Violation</th> <th>MVR</th> <th>Violation Date</th> <th>Source</th> <th>Points</th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td colspan="7"> <div> <div>Violation: -</div> <div>Date of Violation: <input type="text"/> / <input type="text"/> / <input type="text"/></div> <div> <div>Save Violation</div> <div>Cancel</div> </div> </div> </td> </tr> </tbody> </table> </div>							Violation	MVR	Violation Date	Source	Points			<div> <div>Violation: -</div> <div>Date of Violation: <input type="text"/> / <input type="text"/> / <input type="text"/></div> <div> <div>Save Violation</div> <div>Cancel</div> </div> </div>						
Violation	MVR	Violation Date	Source	Points																
<div> <div>Violation: -</div> <div>Date of Violation: <input type="text"/> / <input type="text"/> / <input type="text"/></div> <div> <div>Save Violation</div> <div>Cancel</div> </div> </div>																				

- After all violations have been entered, click the **Continue >>**.
- This will send you to the Coverages tab.

Start	Vehicles	Drivers	Violations	Coverages	Rate	Exit Quote										
MICHAEL MOUSER																
<div> <div>Add Violations</div> <table border="1"> <thead> <tr> <th>First Name</th> <th>Last Name</th> <th>Number of Violations</th> <th>Points</th> <th></th> </tr> </thead> <tbody> <tr> <td>MICHAEL</td> <td>MOUSER</td> <td>0</td> <td>2</td> <td>Violation for this Driver</td> </tr> </tbody> </table> <div>Continue >></div> </div>							First Name	Last Name	Number of Violations	Points		MICHAEL	MOUSER	0	2	Violation for this Driver
First Name	Last Name	Number of Violations	Points													
MICHAEL	MOUSER	0	2	Violation for this Driver												
Automatic MVR Reporting																

- Select the desired coverages.
- Full coverages; UMPD, COMP, COLL, TL, & AE are not available for vehicles over 24 years old.
- Click on the **Save and Continue >>** button.
- This will take you to the Rate tab.

Start	Vehicles	Drivers	Violations	Coverages	Rate	Exit Quote
MICHAEL MOUSER						
Select Coverages						
Save and Continue >>						
Bodily Injury (BI): 25/65 ▾						
Property Damage (PD): 25 ▾						
Personal Injury Protection (PIP): Basic ▾						
Uninsured Motorist Bodily Injury (UI): 25/65 ▾						
Underinsured Motorist Bodily Injury (UIM): 25/65 ▾						
Coverages for 1979 K1500						
Uninsured Motorist Property Damage (UMPD): No ▾ Coverage not available on vehicle of this age.						
Comprehensive (COMP): Declined ▾ Coverage not available on vehicle of this age.						
Collision (COLL): Declined ▾ Coverage not available on vehicle of this age.						
Towing / Labor (TL): No ▾ Coverage not available on vehicle of this age.						
Additional Equipment (AE): Yes ▾						
Save and Continue >>						

NOTE: *If adding comprehensive, collision, or UMPD, photos of the vehicle and proof of ownership will need to accompany the change request.*

NOTE: *Except for North Dakota, if writing coverages without UI/UIM, a signed rejection form must accompany the new application or change request. If they are not received at the time of process, the coverages will be added pending the signed form. If the signed form is received within 30 days of request, the coverages will be removed to original effective dates.*

Rate

Tab

MICHAEL MOUSER

Policy Rating

Effective Date: / /

Select a Payment Plan:

Save Information

Underwriting and Binding

Payment Type	Premium	Fees	SR-22 Fees	Total
Monthly Plan Down Payment	179.59	30.00	15.00	224.59
2 Month Down Payment	359.18	30.00	15.00	404.18
6 Month Full Payment	1,077.62	30.00	15.00	1,122.62
Monthly Installment	179.59	9.00		188.59

**Underwriting
Information**

**View / Attach
Documents**

Policy Rating Detail

Make	Model	First Name	Last Name	Coverage	Limit / Deductible	Rate	Monthly Rate
CHEVROLET	K1500	MICHAEL	MOUSER	BI	25/65	166.17	27.69
				PD	15	177.73	29.62
				PIP	Basic	51.30	8.55
				UI	None	0.00	0.00
				UIM	No	0.00	0.00
				UMPD	No	0.00	0.00
				COMP	Declined	0.00	0.00
				COLL	Declined	0.00	0.00
				TL	No	0.00	0.00
				AE	No	0.00	0.00
Nissan/Datsun	MURANO SL/MURANO SE	MICHAEL	MOUSER	BI	25/65	157.86	26.31
				PD	15	168.85	28.14
				PIP	Basic	41.42	6.90
				UI	None	0.00	0.00
				UIM	No	0.00	0.00
				UMPD	No	0.00	0.00
				COMP	500	59.15	9.86
				COLL	500	201.14	33.52
				TL	No	0.00	0.00
				AE	Yes	54.00	9.00
Total						1,077.62	179.59

- Click on the **Underwriting Information** button and answer the questions on the form and click the **Save Information** button.

Start Vehicles Drivers Violations Coverages **Rate** Exit Quote

MICKEY MOUSE **Policy Rating**

Effective Date: / /

Select a Payment Plan:

Save Information

Underwriting and Binding

Payment Type	Premium	Fees	SR-22 Fees	Total
Monthly Plan Down Payment	147.32	30.00	0.00	177.32
2 Month Down Payment	294.64	30.00	0.00	324.64
6 Month Full Payment	883.91	30.00	0.00	913.91
Monthly Installment	147.32	9.00		156.32

Underwriting Information

View / Attach Documents

Start Vehicles Drivers Violations Coverages **Rate** Exit Quote

MICK **Policy Rating**

NEW Preferred Language**

☐ With the exception of any encumbrances, are any vehicles not solely owned by and registered to the applicant?

☐ Any car modified/special equipment?

☐ Any existing damage to vehicle?

☐ Any other losses incurred?

☐ Any car kept at school?

☐ Any car parked on street?

☐ Any other Auto Insurance in household?

☐ Any other insurance with this company?

☐ Any household member in military service?

☐ Any drivers license been suspended/revoked?

☐ Any driver have physical/mental impairment?

☐ Any financial responsibility filing?

☐ Has insurance been transferred within agency?

☐ Any coverage declined, cancelled, or non-renewed during the last 3 years?

☐ Is this brokered business to the agent?

☐ Has agent inspected vehicle?

☐ Are all vehicles listed on this policy used for personal use only?

Remarks:

Previous Address (if less than 3 years)

Address:

City:

State:

Zip Code:

Employer Information

Name:

Address:

City:

State:

Zip Code:

Phone Number:

Save Information

- Documents like vehicle pictures, registrations, exclusion forms, etc. can be attached at this time by clicking on the **View / Attach Documents** button.

Payment Type	Premium	Fees	SR-22 Fees	Total
Monthly Plan Down Payment	147.32	30.00	0.00	177.32
2 Month Down Payment	294.64	30.00	0.00	324.64
6 Month Full Payment	883.91	30.00	0.00	913.91
Monthly Installment	147.32	9.00		156.32

- Click the **Browse...** button and select the document to be uploaded from your computer.

- Click the **Upload Document** button once the file has been selected and click on the **Rate** tab to go back to the main Rate screen.

File Name		
Uploads\298843\SR22 Certificate.pdf	Open	Remove


- You will be taken back to the Policy Rating screen with a message showing there are Documents attached.

Underwriting and Binding				
Payment Type	Premium	Fees	SR-22 Fees	Total
Monthly Plan Down Payment	179.59	30.00	15.00	224.59
2 Month Down Payment	359.18	30.00	15.00	404.18
6 Month Full Payment	1,077.62	30.00	15.00	1,122.62
Monthly Installment	179.59	9.00		188.59

Underwriting Information

Print Quote Bind Policy

View / Attach Documents 1 File(s) currently attached to Quote.

- After completing the Underwriting Information and attaching any documents, the quote is ready for payment.
 - ✓ Click the drop-down arrow  to see the different payment selections.
 - ✓ Click on the Payment method the insured wishes to pay then click the **Save Information** button to lock in the payment after the selection has been made
 - This payment method will be locked and no changes can be made after the quote is bound.

Start	Vehicles	Drivers	Violations	Coverages	Rate	Exit Quote
Byron Mouse						
Policy Rating						
Effective Date: 6 Month Payment: \$576.00 + 30.00 Policy Fee = \$606.00.						
Select a Payment Plan: 2 Month Payment: \$196.00 + 30.00 Policy Fee = \$226.00.						
1 Month Payment: \$98.00 + 30.00 Policy Fee = \$128.00.						
Underwriting and Binding						

Start	Vehicles	Drivers	Violations	Coverages	Rate	Exit Quote
MICHAEL MOUSER						
Policy Rating						
Effective Date: 08 / 20 / 2020						
Select a Payment Plan: 1 Month Payment: \$179.59 + 45.00 Policy/SR22 Fees = \$224.59. 						
Save Information						
Underwriting and Binding						

- You can click on the **Print Quote** button to give a copy of the quote to the client.
- If the client wishes to continue with the purchase, click on the **Bind Policy** button.
- This box will pop up, select OK if ready to bind.

- If there is any information missing or the quote needs an override, the system automatically lets the user know. You will be able to click the [here](#) button to go back and complete the missing information.
- Email or call the CUIC office if an **Override** is needed.

Payment Type	Premium	Fees	SR-22 Fees	Total
Monthly Plan Down Payment	147.32	30.00	0.00	177.32
2 Month Down Payment	294.64	30.00	0.00	324.64
6 Month Full Payment	883.91	30.00	0.00	913.91
Monthly Installment	147.32	9.00		156.32

Once all of the tabs have been fixed and any overrides taken care of, you will be taken to the payment screen.
(see *payments procedure*)

- After the payment has been uploaded, and the policy bound, you will be able to print the forms.

The screenshot shows the 'Policy Rating' screen with tabs for Start, Vehicles, Drivers, Violations, Coverages, Rate, and Exit Quote. The 'Rate' tab is active. Below the tabs, the 'Policy Rating' section displays the Effective Date as 10 / 01 / 2019 and a selected payment plan: '1 Month Payment: \$139.55 + 30.00 Policy Fee = \$169.55'. Below this is the 'Underwriting and Binding' section, which states 'Payment has been collected.' and contains a table of payment types.

Payment Type	Premium	Fees	SR-22 Fees	Total
Monthly Plan Down Payment	139.55	30.00	0.00	169.55
2 Month Down Payment	279.10	30.00	0.00	309.10
6 Month Full Payment	837.32	30.00	0.00	867.32
Monthly Installment	139.55	9.00		148.55

Below the table are three buttons: 'Underwriting Information', 'Print Forms' (highlighted with a red box), and 'View / Attach Documents'.

- Check the boxes for the documents you wish to print, or just click the **Select All** button and then click on the **Print Documents** button.
- All docs are printed in PDF format.

The screenshot shows the 'Policy Rating' screen with the same tabs as the previous image. The 'Rate' tab is active. Below the tabs, the 'Policy Rating' section displays the name 'Byron Mouse' and a 'Select All' button. Below this are five checkboxes: 'Application', 'ID Supplemental', 'ID Cards', 'Quote', 'SR22 Filing', and 'Medical Statement'. Below the checkboxes is a 'Print Documents' button. At the bottom of the screen, a disclaimer states: 'This quote is based on information provided by the client and the driving records from the DMV. It is subject to change when the company obtains other underwriting reports including but not limited to claims reports and court documents.'

Payment Summary – displays the recent payment history with the payment detailed by method of remittance to CUIC.

- Click on the **Agent Tools** tab and scroll down to the **Payment Summary** button.

Agent Tools	HOME	About CUIC Auto	Contact Us	Other Products	Newsletter
Agent Tools					
Agent Tools	ays your clients' policy information, the current premium due and the due date. You can expand the				
Client Status	ed or excluded), all covered vehicles and the current address on record.				
Online Quoter					
Payment Summary	to access quotes done previously and saved as well as to bind and upload coverage.				
Documents Listing	will display the recent payment history, with the payment detailed by method of remittance to CUIC.				
News	ard payment you are moved to a page that will display information necessary to process the credit				
Help / Forms					
Admin Console					
Policy Document Listing - This page will display important documents posted for policies.					

- There are several ways the summary can be used.
 - ✓ Fill in any one or a combination of fields to view what you want to see.
 - ✓ A report can be generated to see present or historical data.
 - ✓ A dollar value of receipts can be viewed from any date range.
 - ✓ Same day ACH payments can be deleted.

Agent Tools	HOME	About CUIC Auto	Contact Us	Other Products	Newsletter
Payment Summary					
Start Date: <input type="text"/>		Payment Type: <input type="text"/>			
End Date: <input type="text"/>		Policy ID: <input type="text"/>			
Not Received (Current ACH): <input type="checkbox"/>		Insured: <input type="text"/>			
Customer Payments: <input type="checkbox"/>		All Agents: <input type="checkbox"/>			
<input type="button" value="Set Filter"/>		<input type="button" value="Get Printable Report"/>			
Click here to run a historic payment report					
Report Total: \$1,441.17					
<< Prev Next >> Records 1 - 12 of 12					
Policy ID	Named Insured	Payment Type	Payment Amount	Date of Notification	Made By
CUICD-		Credit Card	73.15	10/4/2019 4:32:52 PM	IAI
CUICD-		Credit Card	193.72	10/4/2019 3:20:45 PM	IAI
					Edit Receipt

NOTE: ACH Payments can only be deleted same day the payment was submitted. If the payment needs to be deleted but the date of submission has passed, you will need to contact the CUIC office.

- To delete an ACH Payment click on the **Edit** button.
- Click on the button. This will remove the payment that was just processed.

Agent Tools	HOME	About CUIC Auto	Contact Us	Other Products	Newsletter
Payment Notification Edit					
<< Back					
Payment Amount: <input type="text" value="166.18"/>					
Agent: <input type="text" value="INSURANCE CO INC"/>					
IAI Users - Do not delete payments this way. Decline the payment from our Payment Report.					
<input type="button" value="Delete Payment"/>					
Policy Information					

Documents Listing – This will show all the documents printed and posted for all policies. For a listing of documents for a specific policy, go to the Client Status screen.

Agent Tools	HOME	About CUI Auto	Contact Us	Other Products	Newsletter
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Daily Documents Report

[Mark Selected as Read](#)
[Mark Selected as Completed](#)
[Print Selected](#)
[Select All](#)

Document Date Start:

Document Date End:

Show Documents Flagged Important Only: ☐

Hide Read Documents: ☐

Hide Completed Documents: ☐

	Policy	Name	Document	Doc Date	Date Read	Completed
<input type="checkbox"/>	View CUICD-		Deleted Vehicle	11/12/2019 3:17:59 PM		Mark Comp
	<input type="checkbox"/>	View CUICD-	UDI LETTER and SURVEY	11/12/2019 12:25:45 PM	11/12/2019 1:56:20 PM	✓
	<input type="checkbox"/>	View CUICD-	Notice of Vehicle Removal	11/12/2019 12:23:35 PM	11/12/2019 1:57:43 PM	Mark Comp
<input type="checkbox"/>	View CUICD-		Add excluded driver	11/12/2019 12:04:30 PM		Mark Comp
<input type="checkbox"/>	View CUICD-		Add Driver	11/12/2019 11:22:51 AM		Mark Comp

News - On this screen you will get any of the news flashes we have sent out in the past which we feel are still pertinent. The day that we send out a newsflash, you will be sent directly to this screen when you sign into the system. Please make sure you read the latest posting if you are automatically brought to the screen.

CUI

Casualty Underwriters Insurance Company
 Personal Auto Insurance Coverage

Logged in as: Test Tester
CASUALTY UNDERWRITERS INS CO
Logout

Agent Tools
HOME
About CUI Auto
Contact Us
Other Products

CUI News

02/02/2010 - CUI would like to remind you of the option of receiving payment from your clients using a VISA, MasterCard or Discovery credit card. For your convenience this option is built into the payment screen and will immediately inform you of the acceptance of the payment and return a confirmation number on the receipt.

01/18/2010 - When our State Sales Representatives were recently in our office, they shared with us your frustration in receiving so much returned mail in your agency mail packet. We have added a note to each policy where we had the insured's mail returned to us and we will now only e-mail to you the copies of the mail which has been returned. Once we receive a current address the declaration pages and ID are sent to the insured's new addresses. We determined that this would help you in making sure that you obtain information on billings so they are received by you in a timely enough manner so that you can contact the insured for payment before the policy lapses. Please help us to be able to e-mail this information, by checking your agency's administrator e-mail address for any incorrect information. This information can be fixed by the administrator going to "agent tools", "manage users" and edit. We hope this will help with your overload of paperwork.

10/01/2009 - GOOD NEWS ***** GOOD NEWS ***** GOOD NEWS ***** Casualty Underwriters has reviewed our procedures and have determined that the Vehicle Inspection is no longer required for physical damage coverage. ***** We want you to still be aware of the condition of the vehicle but an inspection will not need to be faxed to us. GOOD NEWS ***** GOOD NEWS ***** GOOD NEWS

Help / Forms Screen - The last drop-down option is the Help / Forms option shown above.

This is where you will find all forms that you might need to use sometime in writing with CUIC. (You are given the option of printing off all needed forms when you bind an application or change if you click on select all).

We also include on this screen the printable views of the change payments guide, Underwriting Guidelines, a copy of the policy and a billing example. Also include are forms for both the agency to set-up a direct deposit for commissions in the **Reference Tools** section and a form for the insured to set up a direct withdrawal for payments in the **Agent Forms** section.

This also includes the Electronic Signature Disclosure which should be shown to clients, prior to electronically binding them with CUIC. The rest of the forms shown are for your convenience that might be requested.

CUIC Casualty Underwriters Insurance Company
Personal Auto Insurance Coverage

Logged in as: Curtis Hedrick INTER AMERICAS INS CORPORATION [Logout](#)

[ick here to process.](#)
[gent Tools.](#)

Agent Tools **HOME** **About CUIC Auto** **Contact Us** **Other Products** **Newsletter**

CUIC Help

 Reports generated on this web site use the Adobe PDF format. If you do not already have Adobe Reader, click [here](#) to download the most recent version. If you are using a version prior to 7.0 we recommend downloading a more current version. There are features in the newer versions that allow PDF files to be opened much quicker.

Reference Tools

- [Change Payments Guide](#)
- [Underwriting Guidelines](#)
- [Agency Procedure Manual](#)
- [Policy](#)
- [Billing Example](#)
- [Direct Deposit Authorization Form \(For Agency\)](#)

Agent Forms

- [Automatic Withdrawal Form \(For Insured\)](#) ([click here for instructions](#))
- [Electronic Signature Disclosure](#)
- [No Loss Statement](#)
- [Change Endorsement](#)
- [Vehicle Inspection Form](#)
- [Named Driver Exclusion \(UT\)](#)
- [Named Driver Exclusion \(ID ND\)](#)
- [Medical Statement](#)
- [Survey Form](#)
- [Agent of Record Change](#)

If you are having difficulties opening any PDF reports generated by this website, click [here](#) for help on trouble-shooting your issue.

ABOUT CUIC AUTO

Under the **About Us** bar you will see the coverage limits that are currently available through CUIC as well as other information about our products.

CUIC

Casualty Underwriters Insurance Company
Personal Auto Insurance Coverage

Logged in as: Test TesterCASUALTY UNDERWRITERS INS COLogout

Agent Tools

HOME

About CUIC Auto

Contact Us

Other Products

About Us

Casualty Underwriters Insurance Company provides the independent insurance agent with a complete line of personal auto insurance for your clients.

Our auto insurance is a six month policy, payable monthly with a true 1 month down plus policy fees. These policies are direct billed from our offices. The policy term is determined by the submitted premium.

Casualty Underwriters policies are administered by Inter-Americas Insurance at their location in Wichita, Kansas. Our Customer Service Representatives are available from 8-5pm CST Monday - Friday to assist you in servicing your clients needs.

They can be contacted at 316-794-2200 ext. 192.

Casualty Underwriters Coverage Limits:

BI – 25/50 (25/65 UT), 50/100, 100/100 and 100/300

PD – 15, 25, 50

Med Pay - 1,000, 2,000 and 5,000 (ID)

PIP – Statutory Limits (UT)

Uninsured Motorist Limits – 25/50 (25/65 UT) and 50/100 (cannot exceed BI limits)

Underinsured Motorist Limits – 25/50 (25/65 UT)

Uninsured Motorist Property Damage – 3,500 (UT)

Physical Damage Coverage Deductibles – 100, 200, 250, 350, 500, 1000, and 2500

CONTACT US SCREEN

Under the Contact Us tab you will see the information for all the different departments which deal with the Auto Policies, Claims, and Accounting. It also lists our mailing and physical address, fax, and general e-mail addresses. At the bottom of the page is the [Customer Payment Portal](#) link.

Agent Tools	HOME	About CUIC Auto	Contact Us	Other Products	Newsletter
Contact Us					
<u>Customer Service/Underwriting</u> (800) 333-2525 Ext 7080 auto@jai-online.com Curtis Hedrick - Auto Director - Underwriting chedrick@jai-online.com (800) 333-2525 Ext 156 Cindy Cummings ccummings@jai-online.com (800) 333-2525 Ext 164 Lupe Amparan lamparan@jai-online.com (800) 333-2525 Ext 178 FAX Number (316) 794-8470			<u>Claims</u> (800) 333-2525 Ext 7081 autoclaims@jai-online.com Renee Bockover – Claims Manager rbockover@jai-online.com (800) 333-2525 Ext 143 Karyle Nicholson – Claims Examiner knicholson@jai-online.com (800) 333-2525 Ext 172 Kerri Newlon – Claims Examiner knewlon@jai-online.com (800) 333-2525 Ext 134 Casey Coble – Claims Examiner ccoble@jai-online.com (800) 333-2525 Ext 122 <u>Premium Accounting and Commissions</u> Kristi Griffith kgriffith@jai-online.com (800) 333-2525 Ext 118		
<u>Address</u> Casualty Underwriters Insurance Company 2118 N Tyler, Bldg A Wichita, KS 67212 <u>Mailing Address</u> Casualty Underwriters Insurance Company PO Box 9510 Wichita, KS 67277					
Customer Payment Portal					

OTHER PRODUCTS

Clicking this tab will take you to the IAI website for agents. There you will find various forms and important information regarding IAI and CUIC.

NEWSLETTER

This will take you to an informational brochure that is put together by the IAI staff which will give agents important information regarding CUIC and other news and fun facts.

FREQUENTLY ASKED QUESTIONS

What are the fees CUIC charges? We charge a one-time \$30.00 policy fee, a \$9.00 handling fee for each regular premium payment, and a \$12.00 late fee to reinstate a policy. A \$15 SR-22 fee is added for each filing. If a policy lapses, an SR-26 (cancellation) will be sent to the corresponding state. If the policy is reinstated, a new SR-22 must be re-filed causing a new fee.

Do you offer automatic withdrawals for premium payment? Yes, we offer automatic withdrawals from a checking account or from VISA MasterCard or Discovery credit cards. Policyholders electing to use a checking account for automatic withdrawals will pay a \$2.00 handling fee, a savings of \$7.00 per month or \$84.00 per year.

Does CUIC have a grace period? No. Once a policy goes into a Lapse Status, they have 30 days in which to make a payment before the policy hard cancels.

Why can't we bind towing to a vehicle? The vehicle is outside the 5 model years allowed. You will see an error message in red on the web page.

Why can't I put comprehensive and collision coverage on a vehicle? The ACV (Actual Cash Value) of a vehicle more than 24 model years is not cost effective for comprehensive and collision coverage and therefore CUIC does not offer this coverage.

The website will not let me move off the violations page and bind the coverage. Why? You have quoted a person which is unacceptable to CUIC. You should be seeing a message in red that they are unacceptable. You can click on the "violations for this driver" to see what has made them unacceptable.

What do I do if the web site says the MVR is not found? This means that the information given on the driver is incorrect; verify with the insured that the name, date of birth, and driver's license number are correct and retry.

What do I do if the web site says the MVR shows as in process, but it never completes? The MVR is trying to be pulled from the service but there is a delay in the process. There are several reasons this happens; the state is not a participating entity with our service and will take 24 hrs. to receive. States that may take 24 hrs. include California, Washington, Hawaii, & Alaska. Or the state site may be down. This may cause an error message of; **"iiX failed to contact State, Request again later"** which means the state website is down. You can bind the policy without getting the MVR, but please ask the client about any violations they may have to get as accurate of a quote as possible.

Can I exclude a driver that has a driver's license that is not valid, but does not have other coverage? Yes, if they are not the policy holder. All licensed drivers must have a valid driver's license to be a rated driver, but can be excluded if they are suspended, revoked, or denied. Expired licenses cannot be excluded.

Can I exclude someone who has other coverage? Yes, enter the other policy carrier if available.

The web site shows this client is cancelled; can I take a payment? Usually if the web site says the client is cancelled and it shows as rewrite in the due date, you must rewrite the policy. If you think something is wrong with this information or if you forgot to upload a payment which would change this information, call CUIC.

The web site shows this client is lapsed; can I take a payment? YES! When you go to the pay option, it will give you the exact amount which will need to be collected to reinstate the policy. This will be a 30-day amount and the excess premium for the time the policy was lapsed will be shown as a credit on the next months billing.

When will a policy renew? How will it renew? Policies are sent a renewal quote approximately 35 days prior to the anniversary date of the policy. The policy will renew automatically when the policy premium is paid.

What timeframe does a client have for vehicle changes on the policy?

Coverage for a newly acquired car is provided at the broadest coverage currently on the policy. If adding a newly acquired vehicle, they have four days from the date of purchase to notify us of the need for coverage. If they are replacing a covered vehicle with a newly acquired vehicle, they have 30 days from the date of purchase to notify CUIC.

Why did the policy due date change? This periodically happens when the insured makes a change on the policy but does not make a payment. The system will show you how much to collect if there is an amount due. To eliminate billing issues, it is best to take a payment at the time of the change. Other factors are additional violations on an MVR that could not be pulled at the time of the change. If violations are added, this raises the premium which can cause the policy period to be shortened.