UMIALIK
INSURANCE COMPANY
A member of the Western National Insurance Group

Agents Xpress℠

Frequently Asked Questions

Will AgentsXpress underwrite the risk prior to submission?
- AgentsXpress is not an expert underwriting system.
- Business Rules are generated to help the entry process and trigger possible concerns.
- Each application is reviewed by an underwriter for acceptability.

What information is needed to receive a quote?
- Required fields are designated by an asterisk (*).

How do I assign drivers with youthful operators in the household?
- Only assign principal youthful operators to the vehicle they operate.
- Do not assign drivers on the policy if there is an occasional operator.
- Do not assign a driver to any excess autos.

Why am I unable to secure a quote, process an application, or make a change request?
- Required information is missing or entered incorrectly.
- Any messages that begin with "Action" on the Summary/Payment/Submit tab must be resolved.
- The rating engine has experienced technical difficulties.

What do I do if I'm unsure of what data to enter?
- Click on the question mark (?) and a small window will appear with definitions or additional information regarding the data required.

Why am I receiving the message that I can only continue in VIEW mode?
- Someone else is currently working with that client record.
- AgentsXpress was not exited properly. To unlock the client, the user identified by the system must enter the client and exit by selecting one of the following options: Save and Exit, Exit Without Saving, Home, or Signout.

What do I do if I select Add Another Resident/Operator or Add Another Vehicle by mistake?
- The system will require you to add some information before leaving the page. If you do not want to add an operator/vehicle then go down to the bottom of the page and select delete operator/vehicle. This will allow you to go to the next page without adding any information.

How do I know when the application has been submitted?
- Once the payment information has been entered on the summary page, click the "Next" box. On this page, click on the "Confirm Payment & Submit". This button will upload the application.

Why is an existing client's name and address protected on an application?

- Because the client's name and address can be tied to multiple policies, therefore, a change needs to be processed prior to entering a new application. Contact us to process the change. Once the change has been processed you can then create the application with the correct information.

How do I quote a change to an existing policy?

- Click on the Change/Cancel Policy Link.
- Create a change for the client you would like to quote. Then go to the Summary/Payment/ Submit tab to see the new premium and view the changes on View/Print Summary. Exit the policy and delete the change if not needed from the Pending Activity page.

How do I delete an entry on the Pending Activity page?

- In order to delete an entry, it must have been created in your office, be pending, and the producer who created the entry must be selected on the Pending Activity page.

Why don't all clients have a hot link on the Pending Activity page?

- Only the Applications that were created in your office have a hot link.
- Only the Changes that have an active status and do not have any pending activity have a hot link. Only one change can be done at a time.

What are the definitions of the statuses on the Pending Activity page?

- P = Pending. Pending means it has been created but has not been submitted.
- U = Underwrite. Underwrite means the change/cancellation was submitted and is waiting for underwriter review. All changes will go from pending status to underwrite status. Applications will only show pending status until submitted. Once the application has been submitted you may view it through AgentsXpress History or through InquiryXpress.

What are the definitions of the statuses on the AgentsXpress History page?

- A = Accepted. Accepted means a change/cancellation has been accepted.
- T = Declined. Declined means a change/cancellation has been declined by Umialik Insurance Company.
- D = Deleted. Deleted means an entry has been deleted from the Pending Activity page by the agency.
- S = Submitted. Submitted means an application has been submitted.

How do I print my documents if I forgot to print them prior to submission?

- Applications: Go to AgentsXpress History and locate your policy. Proceed to the Summary/ Submit page and print the necessary documents.
- Changes/Cancellations: Select the policy from the Pending Activity page and go to the Summary/Submit page and print the necessary documents. Once an underwriter has approved the changes they will be removed from the Pending Activity page and you must then go to AgentsXpress History and follow the Application directions.

How can I make a correction to a previously submitted application?

- A change will have to be submitted through AgentsXpress to amend the application if it has been approved. If you cannot hot link on the policy number, the application has not been approved. Contact an underwriter to make the correction.

Our Mission
To act with integrity in the service of others.