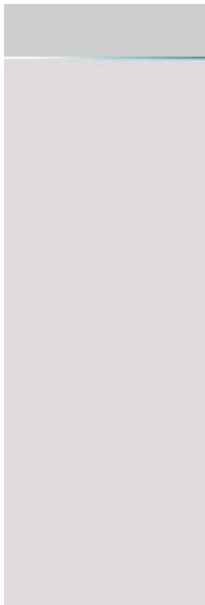


Welcome to RHQ's New Quoting Website Initial Logon Instructions

The following instructions are for the Agency Security Officer (Agency SO) who is in charge of setting up and maintaining the users in the agency. The following is a step-by-step guide designed to lead the Agency SO through his/her own initial account setup, as well as instructions for adding additional agency users.

Log into the site and click submit

- Enter your assigned User ID
- Enter the temporary Password
- Click the **Submit** button.



Homeowner's Program

[Login here to access instant homeowner's insurance quoting and binding:](#)

Login

User Id:

Password:

[forgot password?](#)

As the Agency SO, after your first time logging in, you will be required to change the temporary password.

Change Your Password

User ID:

Old Password:

New Password:

6-16 characters, no spaces allowed:

Retype New Password:

You will be directed to the User Profile page where you will need to complete the following fields:

- First Name
- Last Name
- Password Hint
- Email

[Contact Us](#) [Logout](#)

User Profile

Welcome: Agency SO
Agency Name Here

Maintaining: Agency User

Your agency: 12345

Please review your user profile below and click the Update button to submit any changes you make.

You cannot change any fields that have been disabled. To make permanent changes to disabled fields, please contact your Security Officer.

Some data labels below include help links, click the link to view the description.

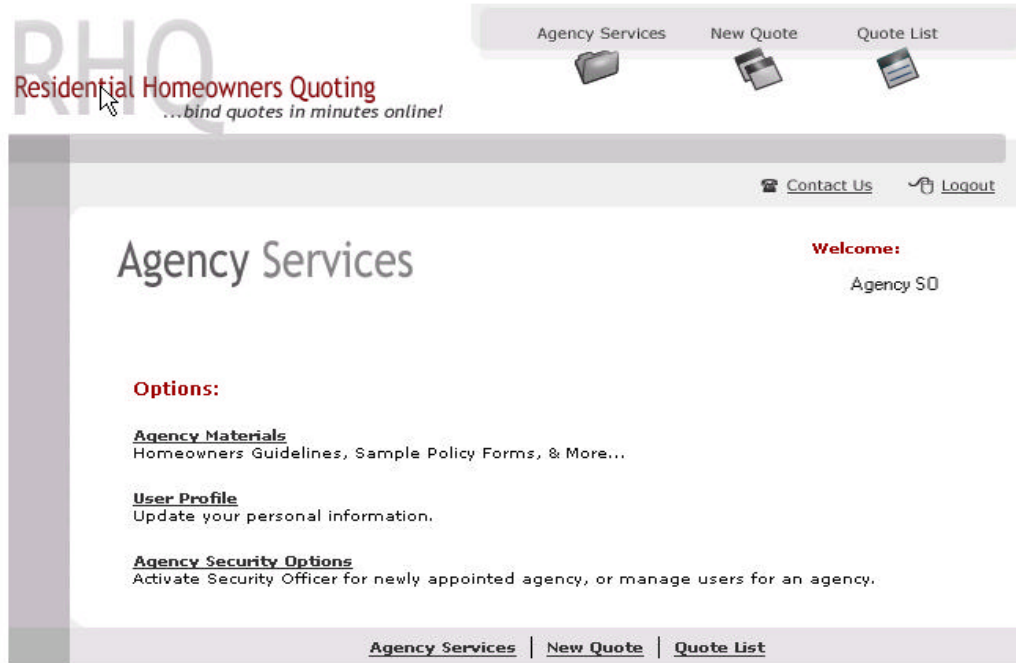
Surplus Lines Wholesaler	<input type="text" value="Surplus Wholesaler"/>
Retail Agent Number	<input type="text" value="Agent Number"/>
Retail Agent Company Name	<input type="text" value="Agency Name"/>
First Name	<input type="text" value="First Name"/>
Last Name	<input type="text" value="Last Name"/>
User Role	<input type="text" value="Marketing S.O."/>
User Status	<input type="text" value="Active"/>
User ID	<input type="text" value="User ID"/>

Click the **Update** button once you have completed the form.

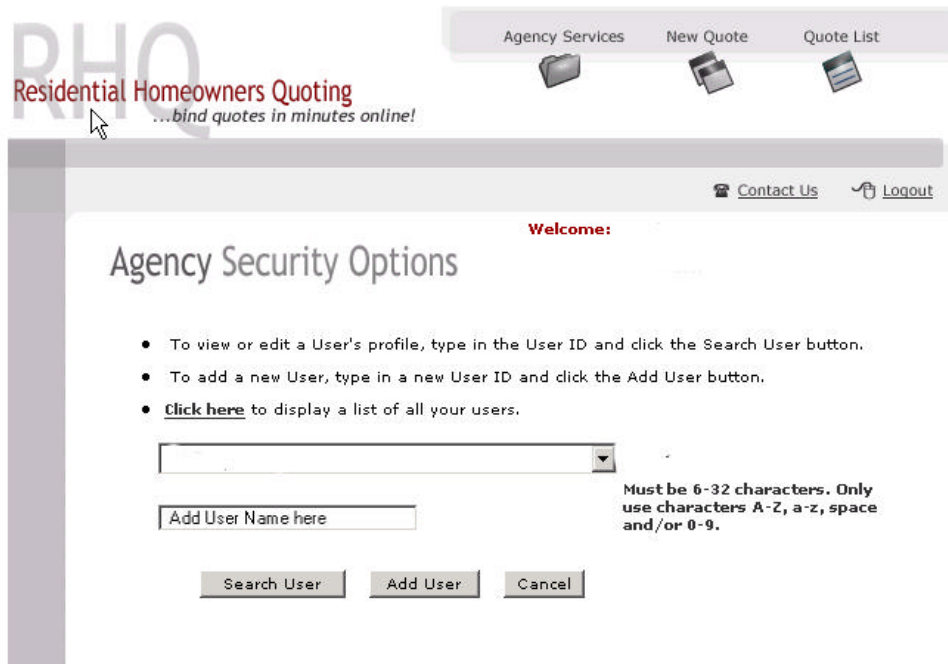
You will receive confirmation that the profile has been updated.

You can now proceed to the [Agency Services](#) page to setup other agency users, or you can begin quoting by selecting the [New Quote](#) tab.

- **To add users** from the [Agency Services](#) page, click on the [Agency Security Options](#) link.



- Type the individuals User Name in the Add User Name here field.
- Click **Add User**.



Later you will use the [Agency Security Options](#) page to search for users, add additional users or maintain the profiles of existing ones.

To set-up additional agency users

- Complete the User Profile information
- At the User Role field, we suggest that you select the Agency User designation for the other agency users. This allows all users to access each other's quotes. (For an explanation of User Role click on the link)
- You will assign a unique User Id for each agency user
- You will assign a unique Password for each agency user

The screenshot shows the RHO Residential Homeowners Quoting interface. At the top, there is a navigation bar with links for "Agency Services", "New Quote", and "Quote List". Below this is the RHO logo and the text "Residential Homeowners Quoting ...bind quotes in minutes online!". On the right side, there are links for "Contact Us" and "Logout". The main content area is titled "User Profile" and includes a "Welcome:" message for "INS. SERVICES" and a link for "Insurance Services". Below this, it says "Adding User: test.". A message instructs the user to review their profile and click "Submit" or "Reset". The form fields are as follows:

Surplus Lines Wholesaler	MGA	
Retail Agent Number	Agent #	Retail Agent List
Sub Agent Number		
First Name	Users First Name	
Last Name	User Last Name	
User Role	Select	
User Status	Active	
User ID	test	
Password	Assign Password	6-16 characters, no spaces allowed;

When you are finished, click the **Submit** button and you will receive confirmation that the User has been created. Click **OK** and you may continue adding more users.

RHQ Quoting Website Tips

Assigning the Agency Security Officer (SO)

Every agency should designate an employee to be the Security Officer (SO). The SO is responsible for the initial setup of all users who will access the RHQ Website for quoting. The SO is also responsible for maintaining user profiles, resetting passwords, and activating and deactivation users as required. Each agency will receive an initial User ID and temporary password for the SO.

Agent Users

The agency SO should add all users to the website as soon as possible, and a good time to do this is when the SO first logs onto the website. This saves time and helps the SO become familiar with the RHQ security requirements. By assigning individual user ids and passwords, agencies can track policies by users.

Pending Quotes on the Quote List Options Page

Once a quote request has been submitted, the status can be checked by going to the Quote List Options page. To clear a quote with a *Pending* status, click on the option *Update* to refresh the page. This will update the status for the quote to either *Accepted* or *Rejected*.

Rejected Quotes on the Quote List Options Page

If the status of a quote indicates *Rejected*, click on the word *Rejected* to view the reason. The reasons for rejections will be noted “in red” on the Quote page. This could vary from “The specified street cannot be located,” to, “Ineligible swimming pool: 3.” Adjustments to the original quote can then be made and must be resubmitted.

Accepted Quotes on the Quote List Options Page

An *Accepted* status for a quote will indicate a quote number in the *Status* column. The quote number is a link to the Quote Detail screen. This area allows you to:

- Edit and review any of the entered quote information
- Edit the dwelling amount, the personal liability and deductible information
- View the breakdown of total charges
- E-mail, print and **bind** the application

The quote must be resubmitted if edits are made to the original quote.

Binding an Accepted Quote from the Quote Detail Page

Binding a quote is done online and is available once the quote is in an *Accepted* status. Binding a quote is done from the Quote Detail screen by selecting “*Bind Quote*.” If the following information had not previously been entered, the program will prompt for the information before the quote can be bound: Mortgagee data, billing/payment information, and optional endorsement selection. Although a quote has been accepted, when the binder is submitted, the system checks with a claims reporting service to verify any homeowner claims within the past three years for the “property address” and for the “name of the insured.” Based on claim information, the binder can be rejected at this point.

Quotes/ Binders Numbers

It is important to be aware of the difference between a quote number and a binder number because both will show up in the *Status* column. Quote numbers start with the prefix **QA** and binder numbers start with **GU3 (for 2003)** and will also be the policy number.

Searching for the Quote List Options Page

There are two options available for searching for a quote on the Quote List Options page:

- Use the *Quote List Menu* and select *List Setup* to filter or view specific quotes by status, reference code, or date.
- The *Search* function helps to locate specific quotes by Applicant's First Name, Applicant's Last Name, Property Address, or Quote Number (only for accepted quotes).

Using the Reference field on the Quote Page

To allow for sorting by *Reference Code* on the Quote List Options page, a user can easily access "just" their quotes by adding an individual code such as the "users initials" in the *Reference* field at the bottom of the Quote page.

Forget Password?

- For an Security Officer
 - Try the *Forget Password* option below the login in box. The correct User Id and email address is required.
 - If the password hint does not help, call the MGA or send an e-mail using the address posted on the login page.
- For a Agent User
 - Try the *Forget Password* option below the login in box. The correct User Id and email address is required.
 - If the password hint does not help, contact the agency SO to reset the password.
 - If the SO is not available, call the MGA or send an email to the address posted on the login page.