Creating a Quick Quote

Non-Trucking Liability and Physical Damage

General Information

Click on the link to access Great Roadmap: gaigtrucking.cloudinsurer.com

Follow these instructions to create a Quick Quote. Once a Quick Quote has been created and the premium calculated, you can then create a Full Quote and Issue.

Login Page

1. Log into Great Roadmap using your GAIG username and password.
2. On the Create New Quote tile, select **Non Trucking Liability and Physical Damage** from the drop down-menu.
3. Click **Let's Begin**.

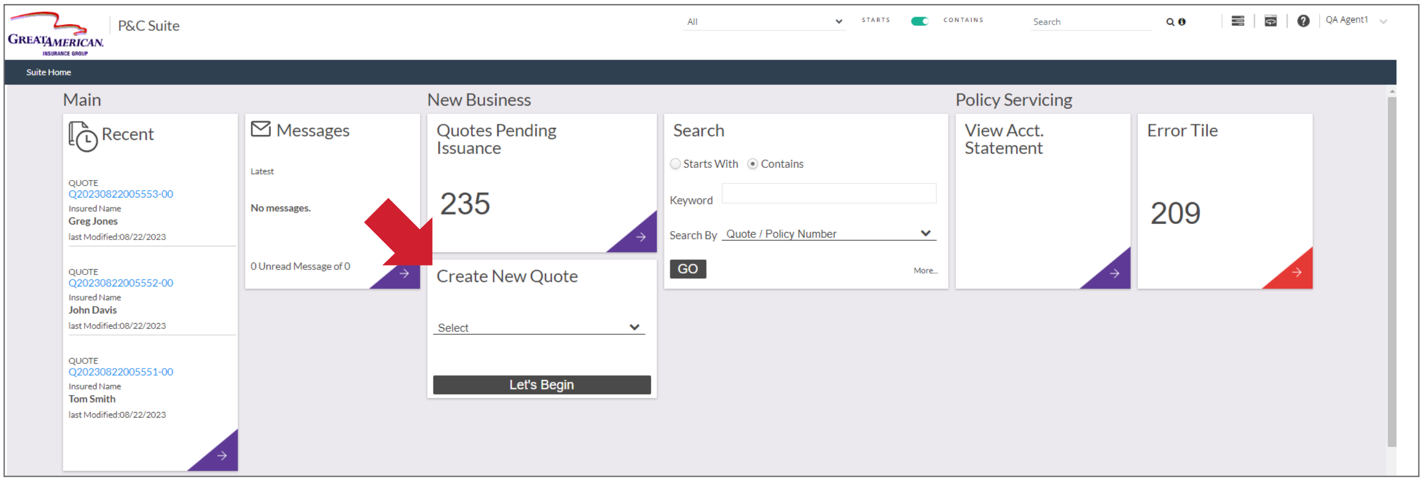

Figure 1. Home screen.

Quote Screen

1. Click on the search icon and select the **Term of Insurance** from the pop-up menu.
2. Enter the **Effective Date**.

NOTE: *Required fields are indicated by a red bar.*

3. Select the **Type of Business** and enter the insured's information. This defaults to Individual.

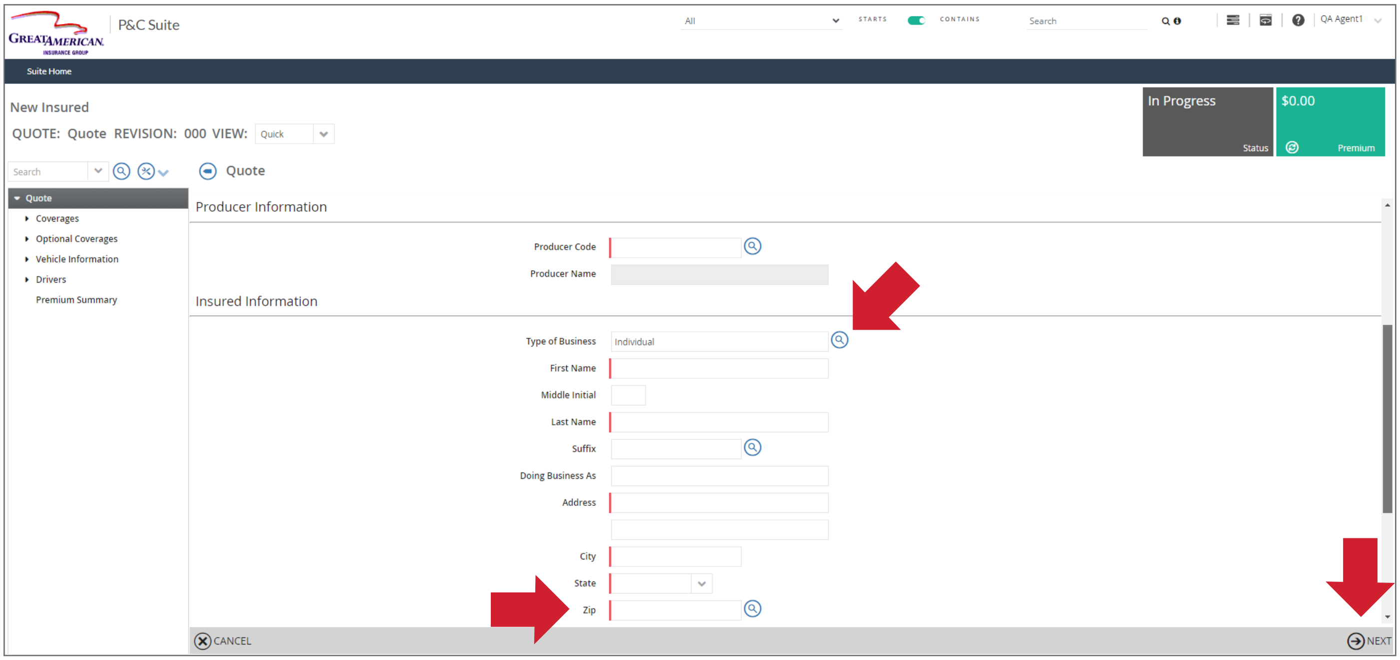

Figure 2. Insured Information.

NOTE: *If you enter the zip code first, the city and state will auto-populate.*

4. For **Garage details same as Insured Details?** Do the following:
   a. If the garage address is the same as the insured's address, select **Yes**.
   b. Otherwise, select **No** and enter the garage address.

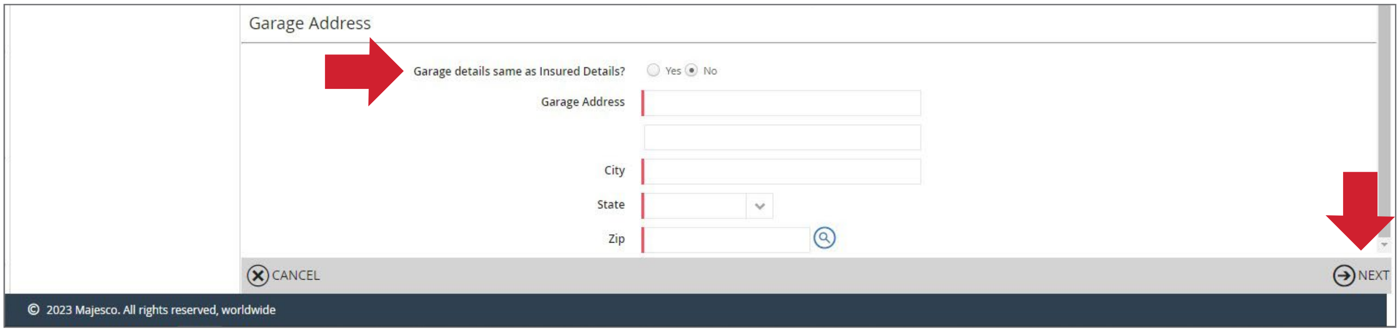

Figure 3. Garage Address.

5. When finished, click **NEXT**.

Coverages

1. Select your product(s) **NTL** and/or **PD**. You can choose one or both.
2. For NTL and PD Coverages, enter the coverage **Limit** and **Deductible** information as required.

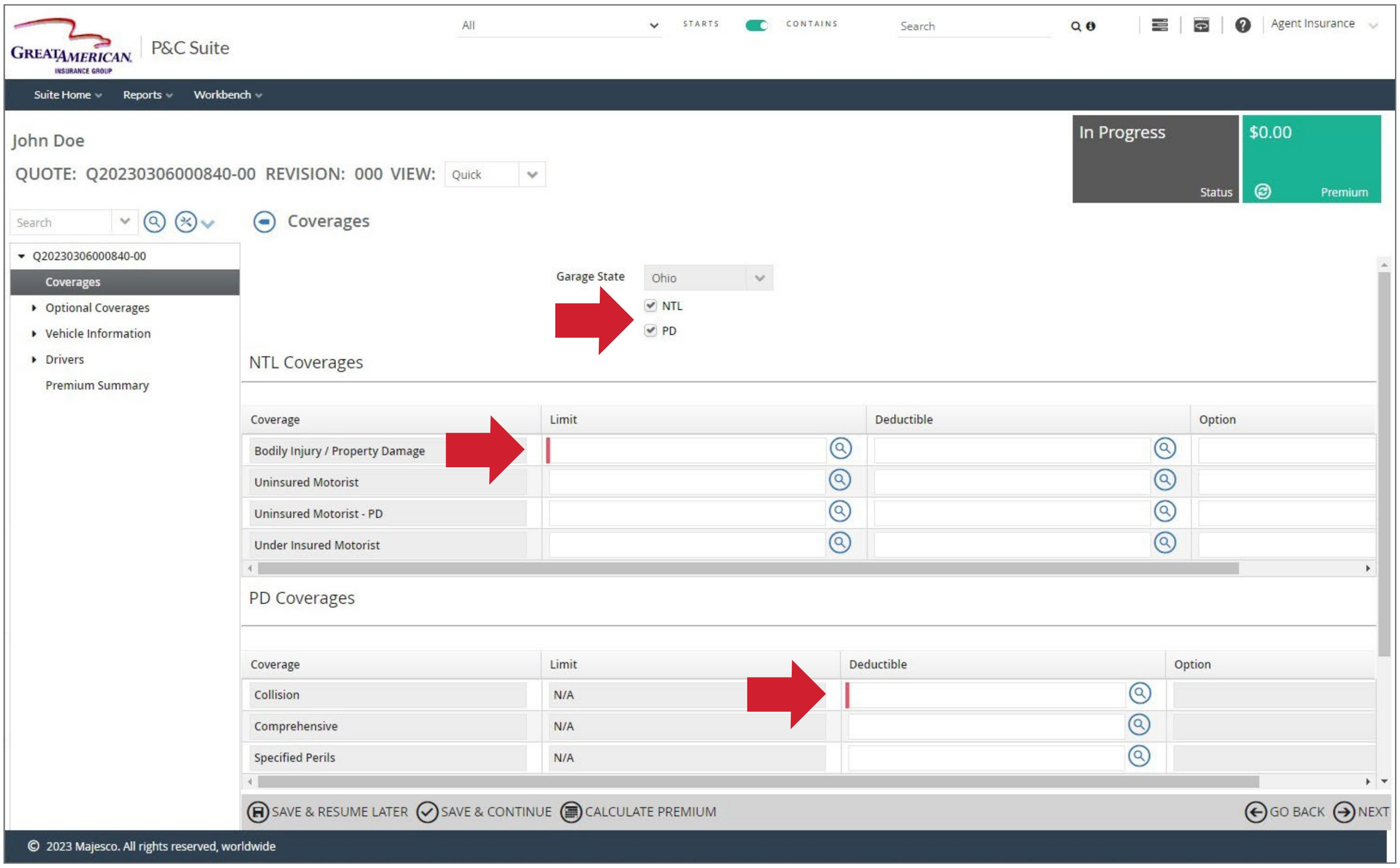

Figure 4. Coverages

3. For Rating Information, select the **Primary Commodity Hauled**.
4. Select the **Usage**.
5. Click **NEXT** when finished.

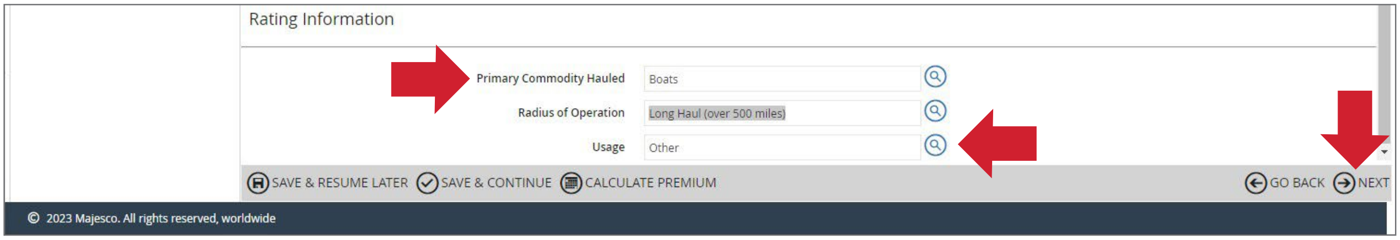

Figure 5. Rating Information

Optional Coverages

1. Select the **TruxPro** and/or **Deductible Buy Back** as needed. If you select Deductible Buy Back, fields for the limits and amount will become available.
   a. Select **Aggregate Limit Applies** and enter the **Aggregate Limit.**

   OR

   b. Enter the **Liability PD Limit**, **Cargo Limit**, or **Trailer PD Limit** individually as needed.
2. Select a **Retained Amount** from the pop-up window.

NOTE: *For each Limit and Retained Amount, anything over $10,000 will be referred to an underwriter. Liability PD Limit, Cargo Limit, and Trailer PD Limit are not required. You can also select Aggregate Limit Applies.*

NOTE: *Towing & Storage defaults to $10,000 and is used for quoting. However, higher limits may be considered by referring to your underwriter.*

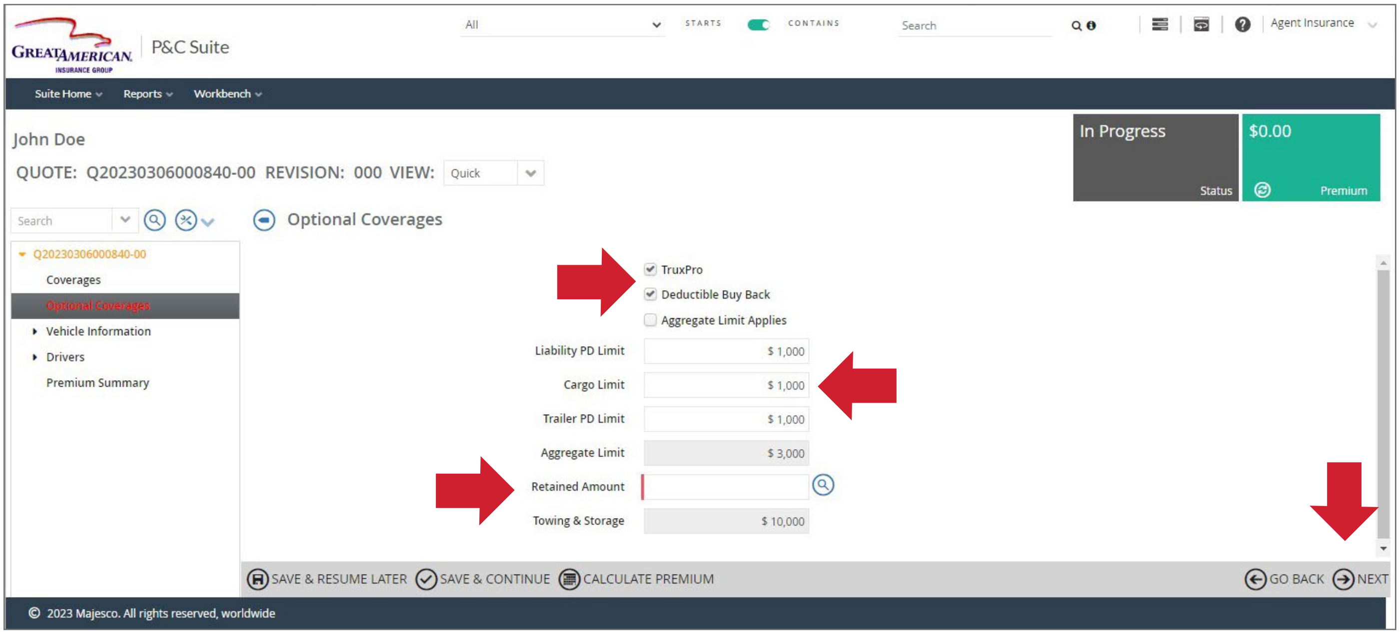

Figure 6. Optional Coverages

3. When finished, click **NEXT**.

Vehicle Information

1. Click **ADD** to add a vehicle. This will open up a new screen.

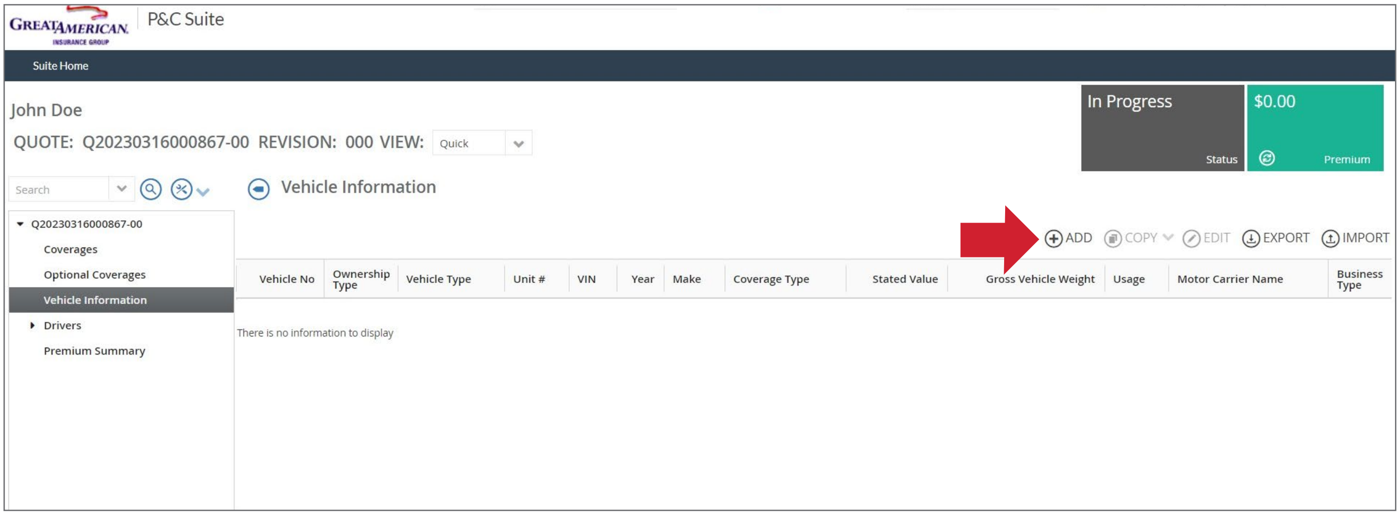

Figure 7. Vehicle Information.

2. Enter the required Vehicle Information.
   a. If you are adding more than one vehicle, you can click **SAVE AND NEW** and continue adding vehicles as needed.

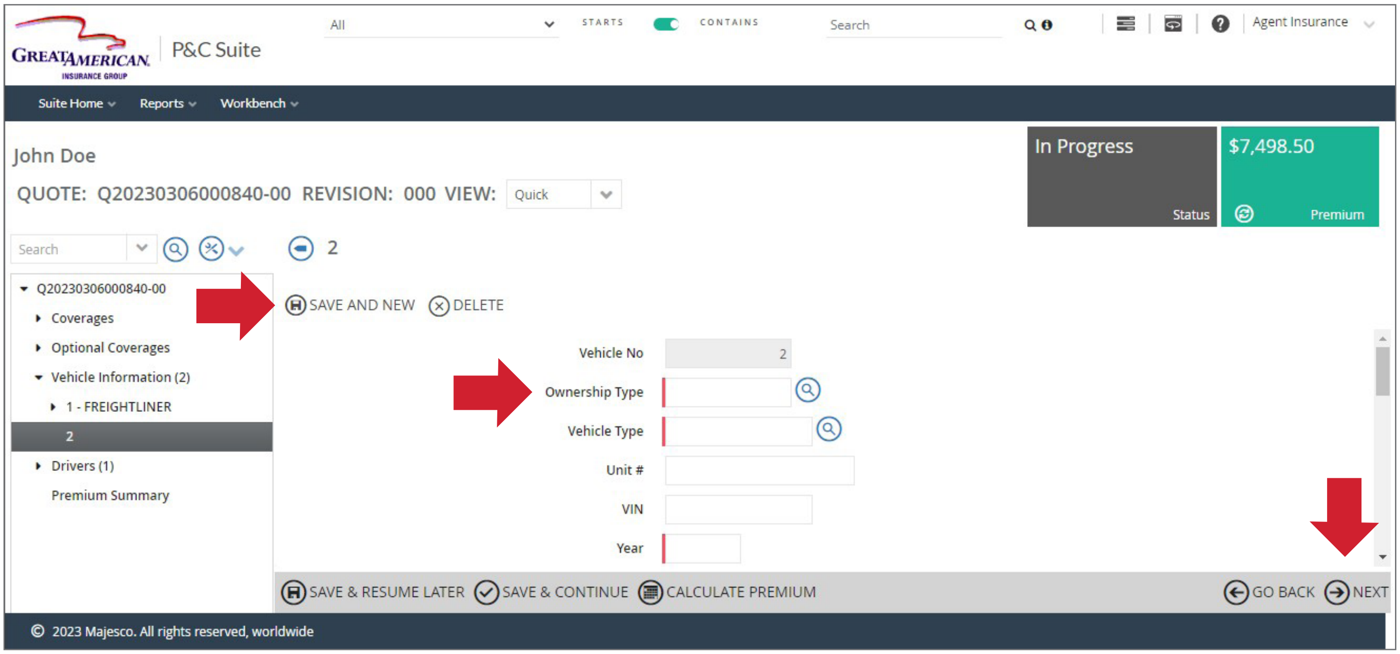

Figure 8. Adding a vehicle.

3. When finished, click **NEXT**. The vehicle(s) you added will be listed in a table on the Vehicle Information screen.
4. On the Vehicle Information screen, click **DONE WITH VEHICLE INFORMATION** to begin entering the drivers on the next screen.

Drivers

1. Click **ADD** to add a driver. This will open up a new screen.

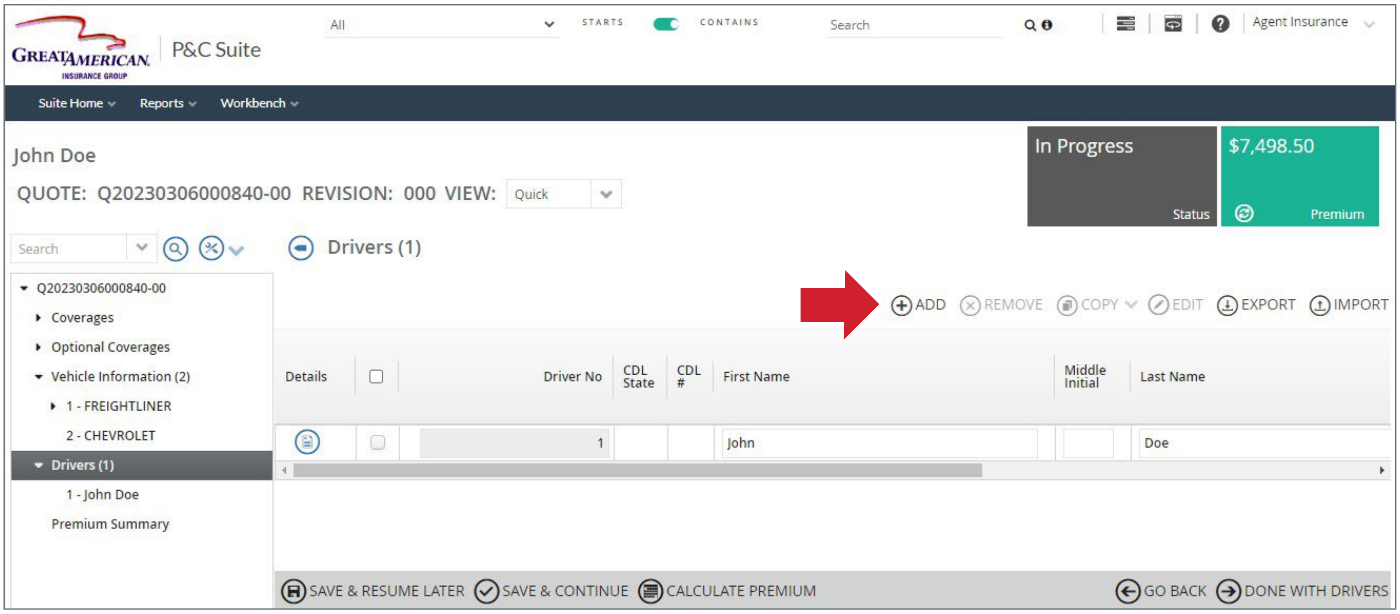

Figure 9. Adding a driver.

2. Enter the required Driver Information.
   a. If you are adding more than one driver, you can click **SAVE AND NEW** and continue adding drivers as needed.

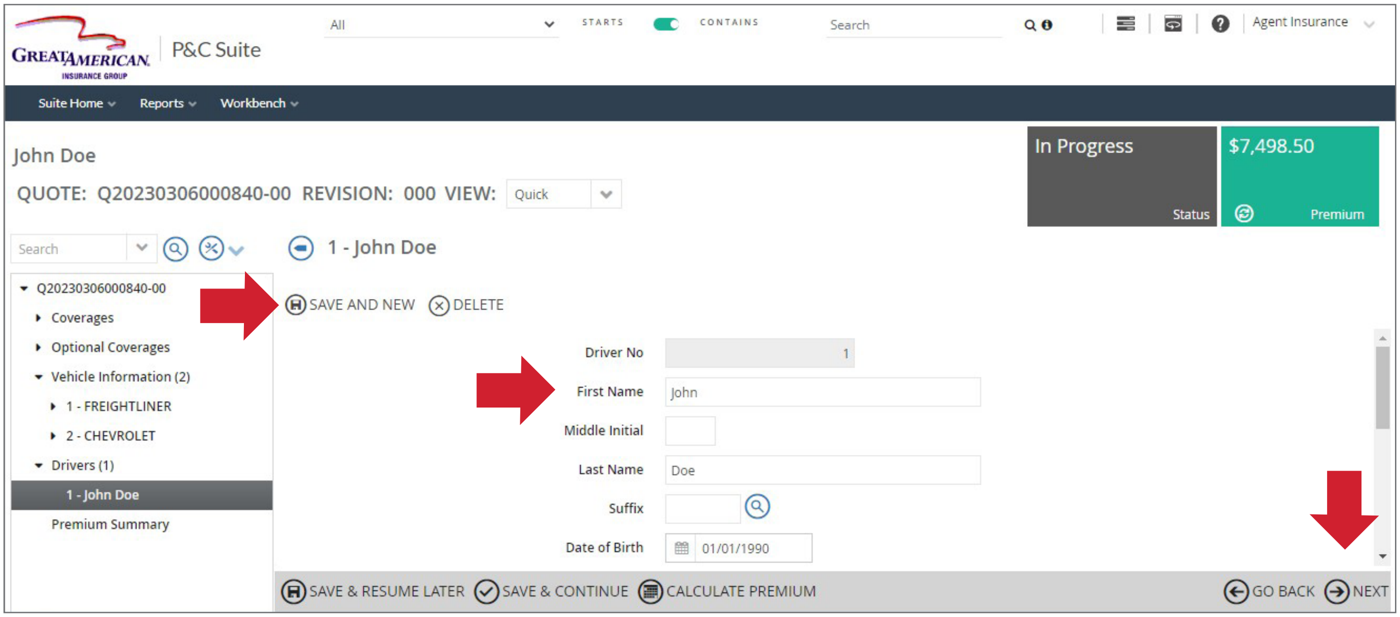

Figure 10. Adding a vehicle.

3. When finished, click **NEXT**. The driver(s) you added will be listed in a table on the Drivers screen.
4. On the Drivers screen, click **DONE WITH DRIVERS** to go to the next screen.

Premium Summary

1. On the Premium Summary screen, click **CALCULATE PREMIUM** to see the Premium Summary.

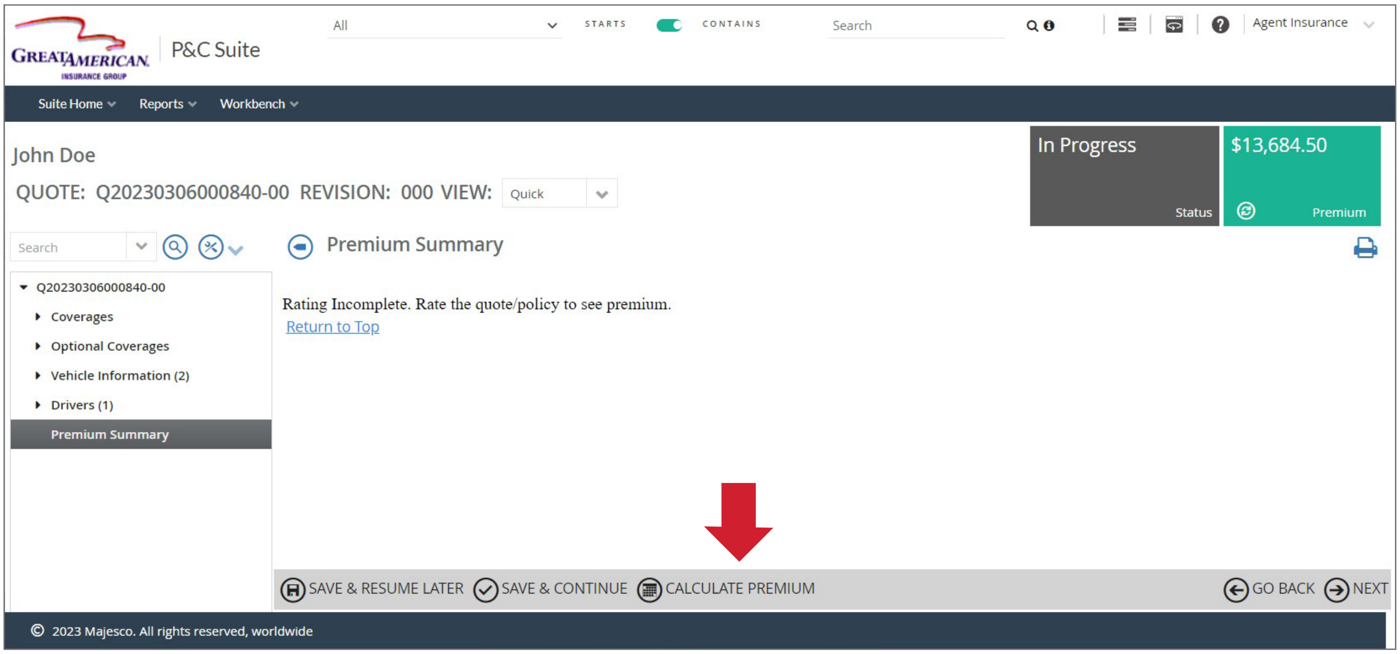

Figure 11. Premium Summary before calculating premium.

2. Once the premium has been calculated, you can choose **General** or **Scheduled Vehicles** from the drop down menu to see a diversification of premium.

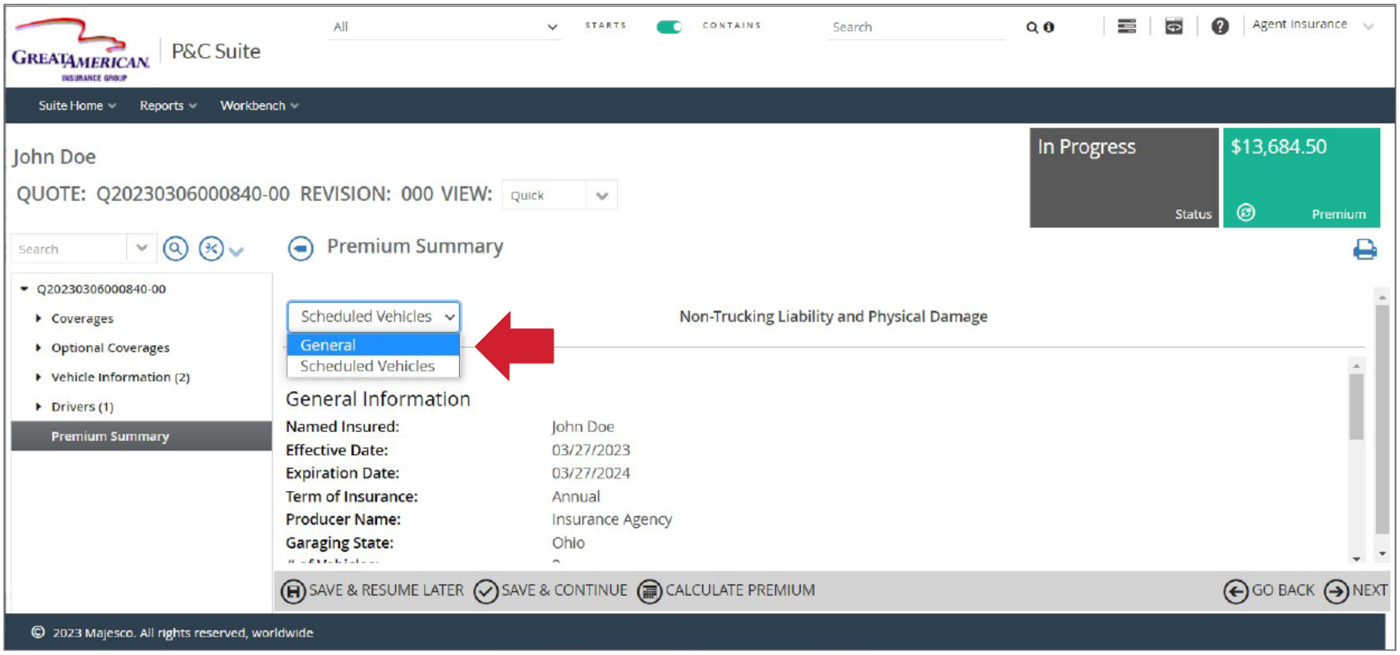

Figure 12. Premium Summary with view and print options.

3. Click **Next** to go to the Dashboard. From there you can convert the Quick Quote into a Full Quote.

Converting a Quick Quote to a Full Quote

Non-Trucking Liability and Physical Damage

General Information

Once a Quick Quote has been created, you can convert it to a full quote from the dashboard. To do a Full Quote, you will need to enter billing, vehicle and driver information.

On the dashboard, under Choose Next Action, click **Convert to Full Quote**.

NOTE: *You have to the option to make changes to the Quick Quote by clicking Edit or Revise. Clicking Edit will allow you to make changes but will not keep a revision history. Clicking Revise will allow you to make changes and the system will create a new quote version. The user can then select which version they want to use to convert to a policy. Inquire will give you the ability to review the quote but not make any changes.*

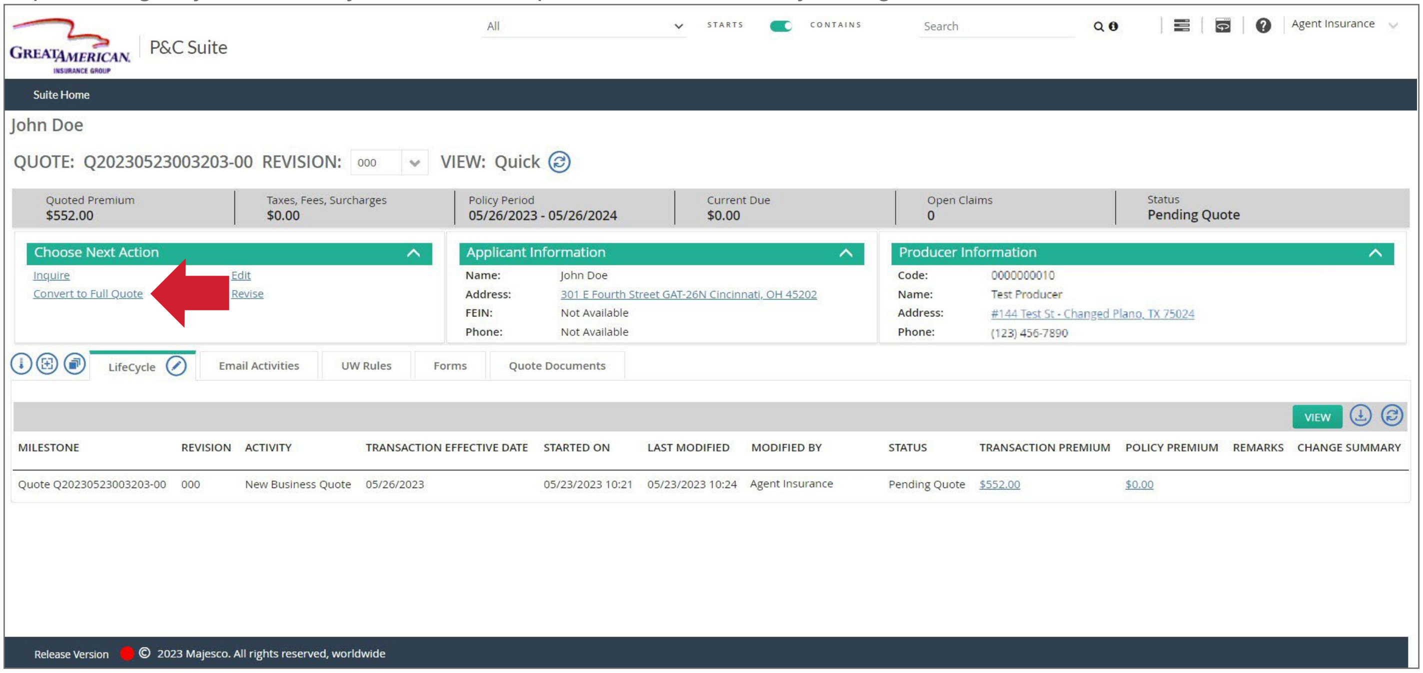

Figure 1. Dashboard.

Billing Information and Coverage Review

1. On the Quote screen, scroll down to the Billing Information section and select a **Billing Option**.

NOTE: *For Direct Bill, you will need to verify the billing address and make a payment in the system before you can bind and issue the policy. For Agency Bill, the Billing Information fields will auto-populate, and the agent will be responsible for collecting any payment.*

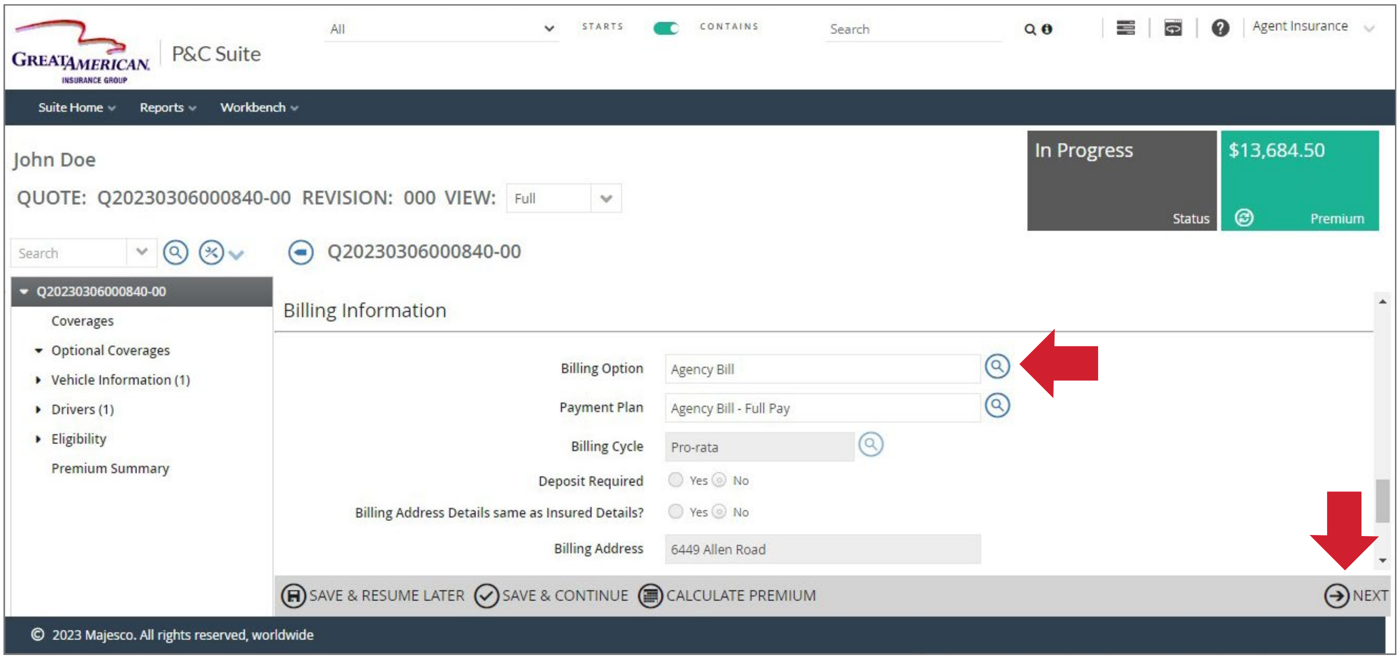

Figure 2. Billing Information.

2. Click **NEXT** when finished entering the billing information to review or change the Coverages screen.
3. When finished, click **NEXT** again to review or change the Optional Coverages screen.
4. When finished, click **NEXT** to go to the Vehicle Information screen.

Vehicle Information

1. Click the details icon to open the vehicle details screen.

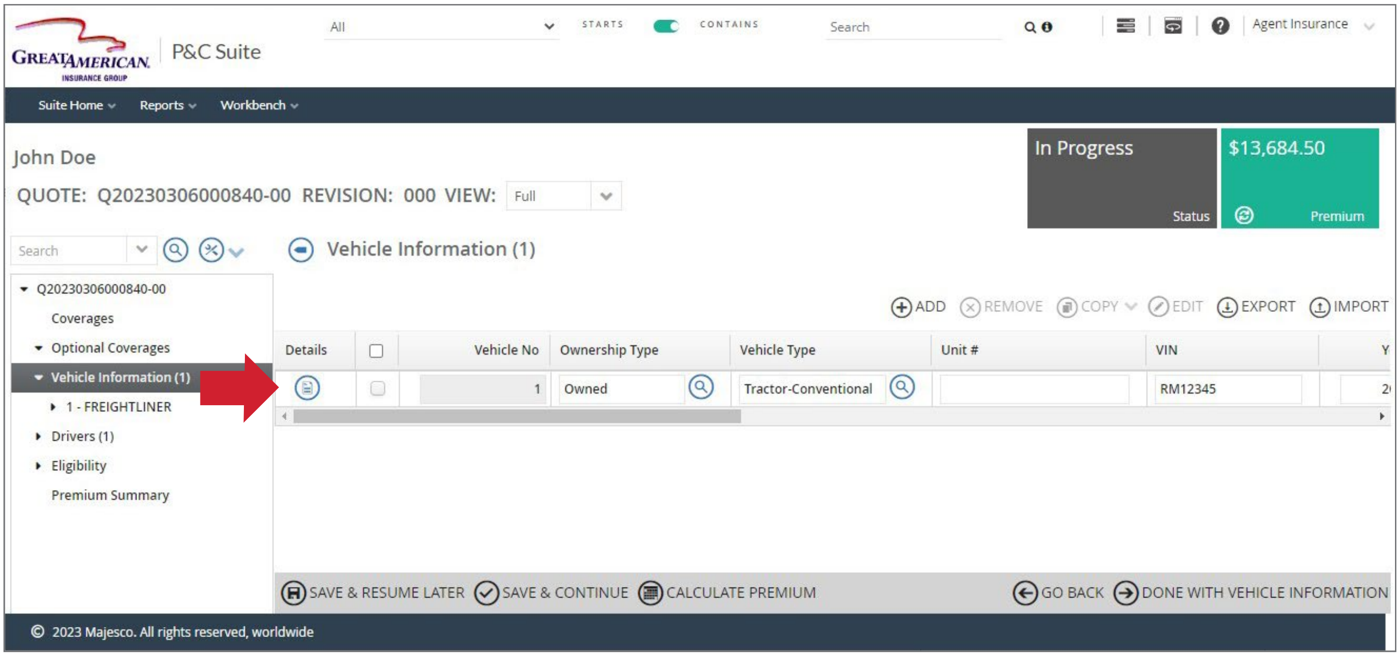

Figure 3. Vehicle Information

2. On the Vehicle Details screen, enter the **VIN**.

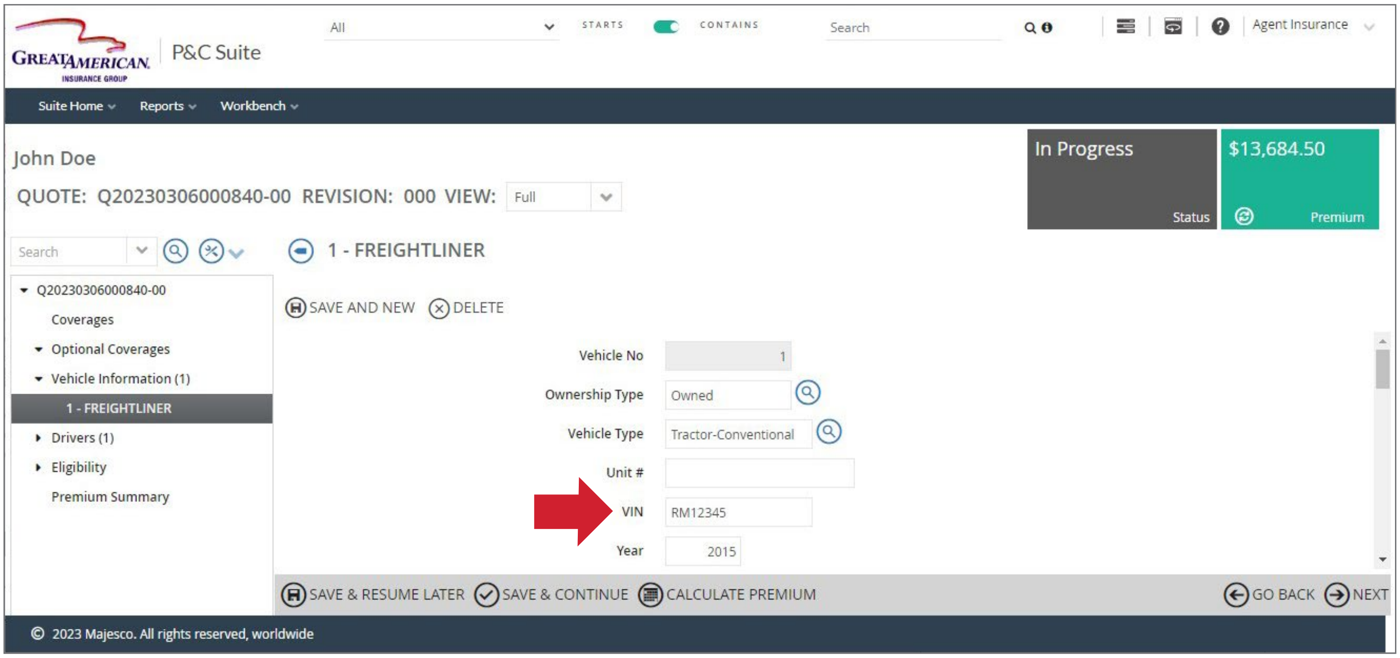

Figure 4. VIN

3. To add any additional interest, do the following:
    a. Scroll down to the Additional Interest section.
    b. Click **ADD**.
    c. Select the **Interest Type** from the pop-up window.
    d. Enter any required information (name, address, etc.).
    e. Continue to add any additional interest as needed.

***NOTE:** Additional Insureds will need to be reviewed by an Underwriter.*

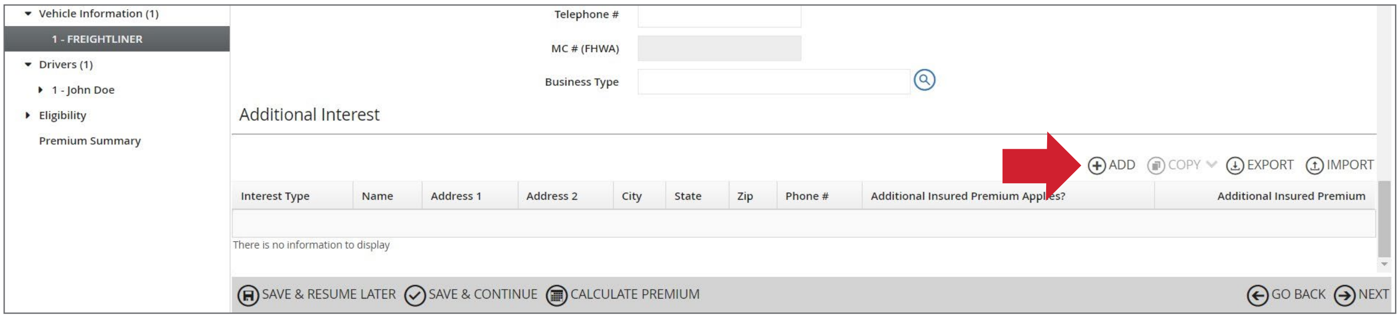

Figure 5. Additional Interest

4. Click **NEXT** when finished.
5. Continue to add a VIN and any additional interests for each vehicle. When finished, click **DONE WITH VEHICLE INFORMATION**.

Drivers

1. Click the details icon to open the driver details screen.

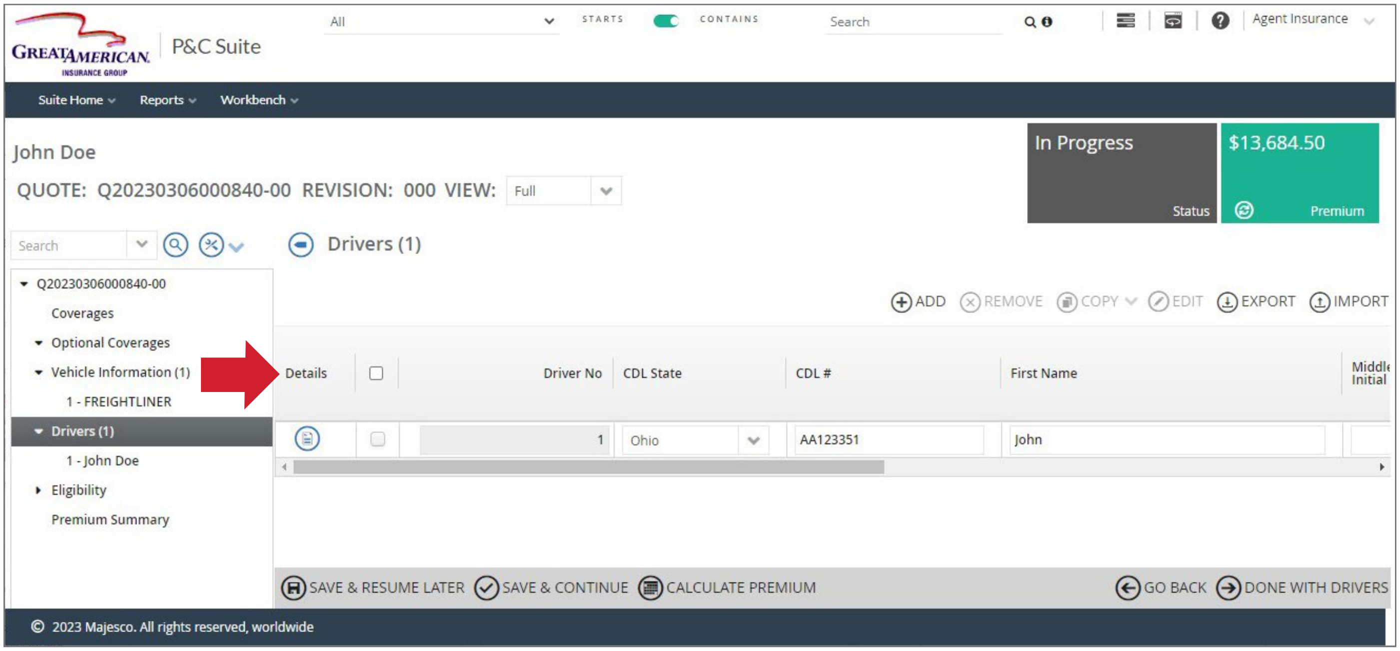

Figure 6. Driver screen.

***NOTE:** At this point, an MVR will be pulled on the driver.*

2. Select the **CDL State** from the drop-down menu.
3. Enter the **CDL** #.
4. Continue to add information as required.

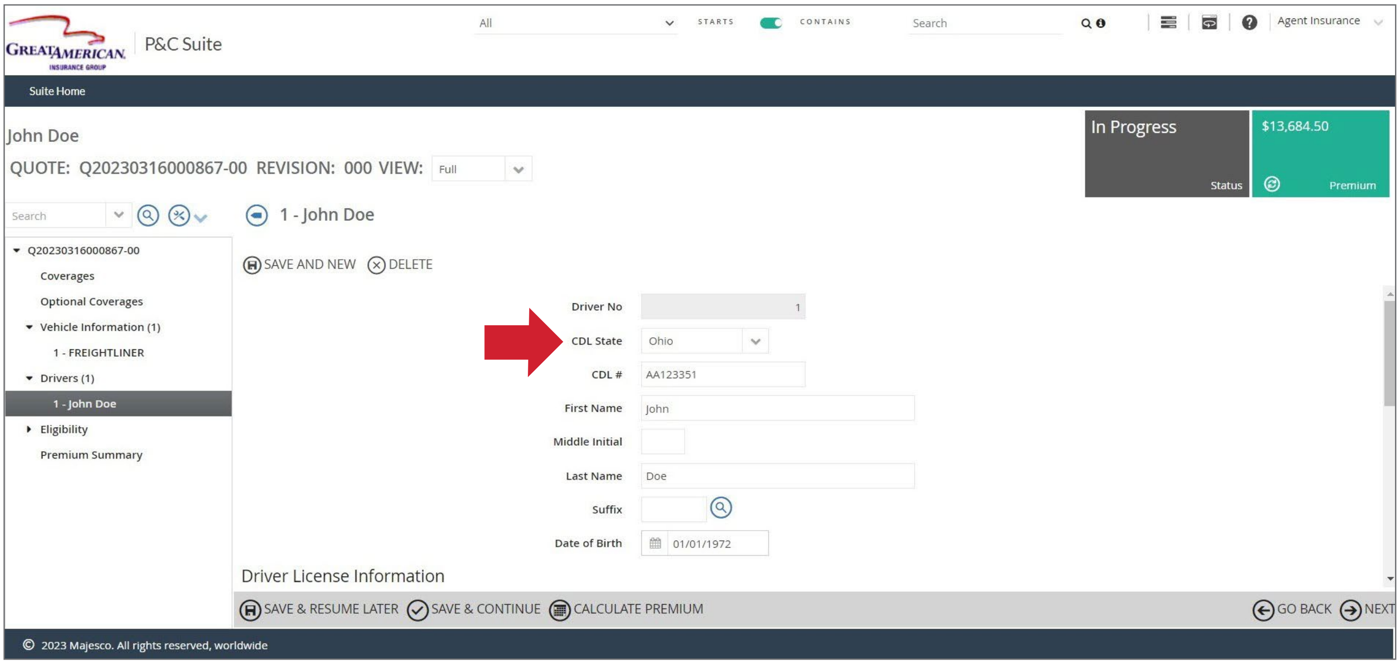

Figure 7. Driver details screen.

5. Click **NEXT** when finished.
6. Continue to add details for each driver. When finished, click **DONE WITH DRIVERS.**

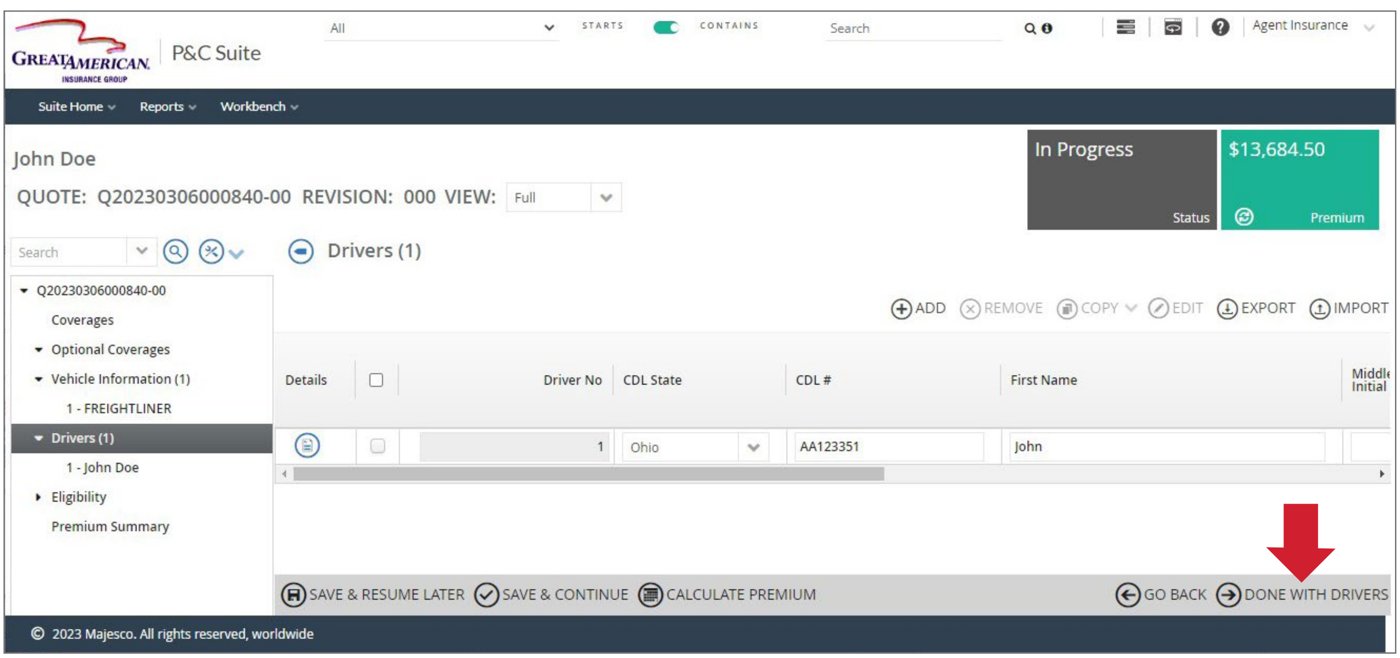

Figure 8. Driver's added and MVR pulled.

Eligibility

1. On the Eligibility screen, select **Yes** or **No** for each of the questions.

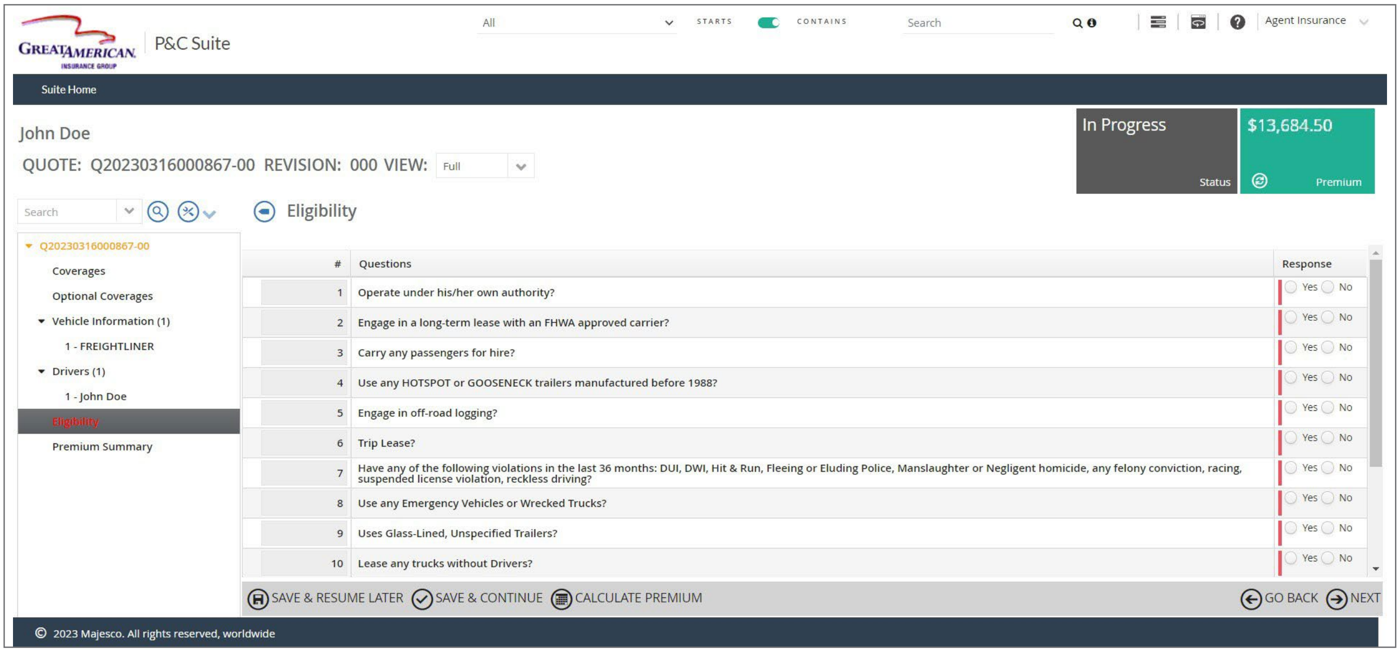

Figure 9. Eligibility.

2. When finished, click **NEXT**.

Premium Summary

1. On the Premium Summary screen, click **CALCULATE PREMIUM** to see the Premium Summary.

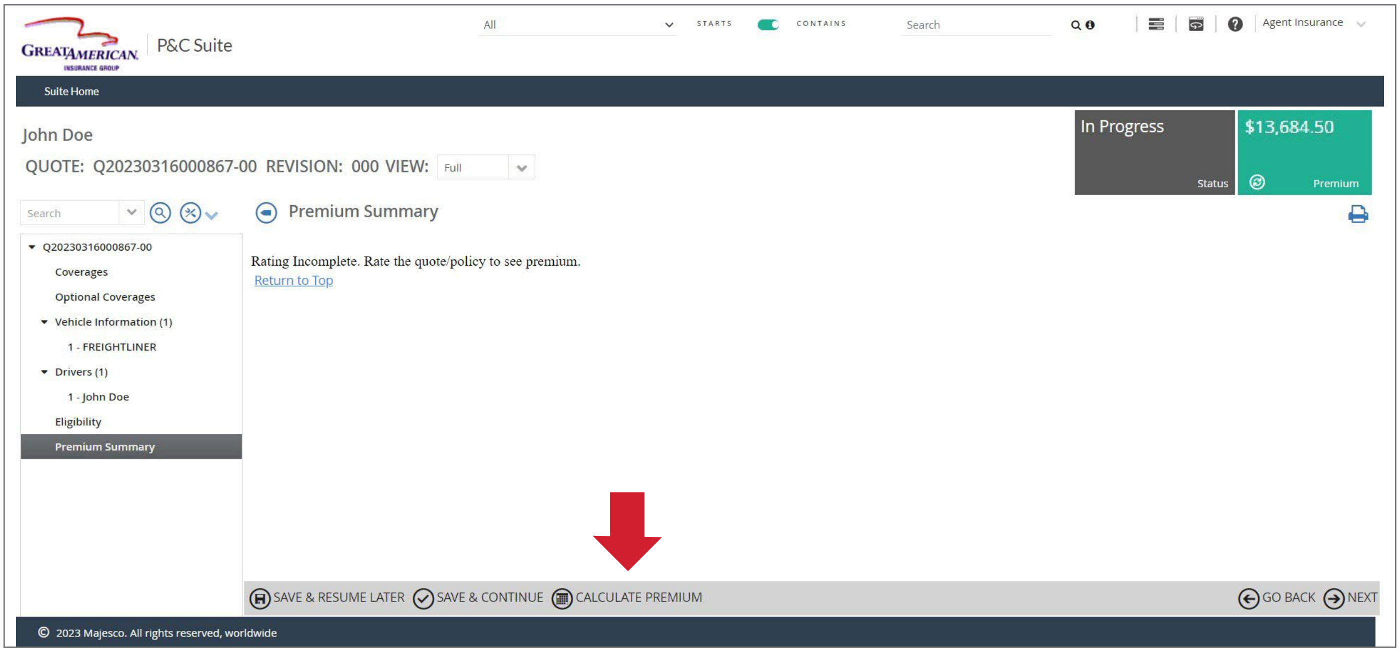

Figure 10. Premium Summary before calculating premium.

2. Once the premium has been calculated, you can choose **General** or **Scheduled Vehicles** from the drop down menu to see a diversification of premium.

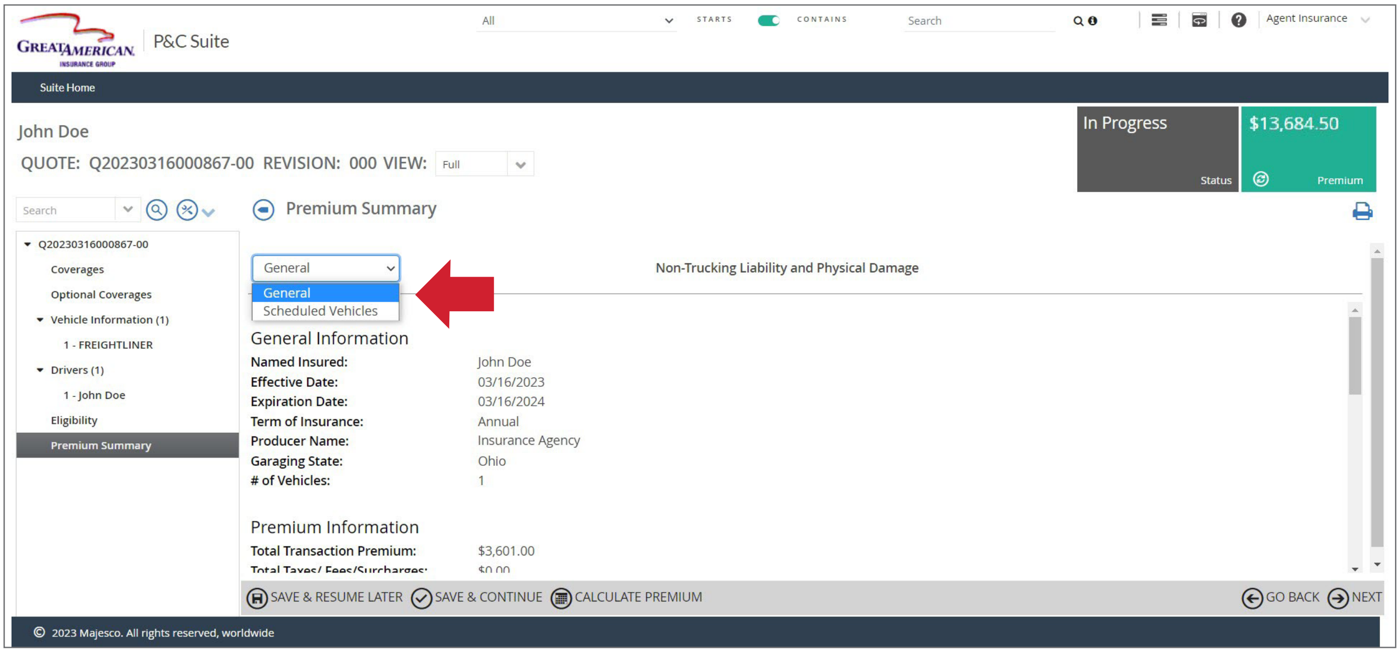

Figure 11. Premium Summary with view and print options.

3. Click **NEXT** to go to the Dashboard. From there you can issue the policy.

Converting a Full Quote to a Policy

Non-Trucking Liability and Physical Damage

General Information

Once a Full Quote has been created and accepted, you can now convert it to a Policy.

1. On the dashboard, under Choose Next Action, click **Convert to Policy**.

NOTE: *You have to the option to make changes to the Quick Quote by clicking Edit or Revise. Clicking Edit will allow you to make changes but will not keep a revision history. Clicking Revise will allow you to make changes and the system will create a new quote version. The user can then select which version they want to use to convert to a policy. Inquire will give you the ability to review the quote but not make any changes.*

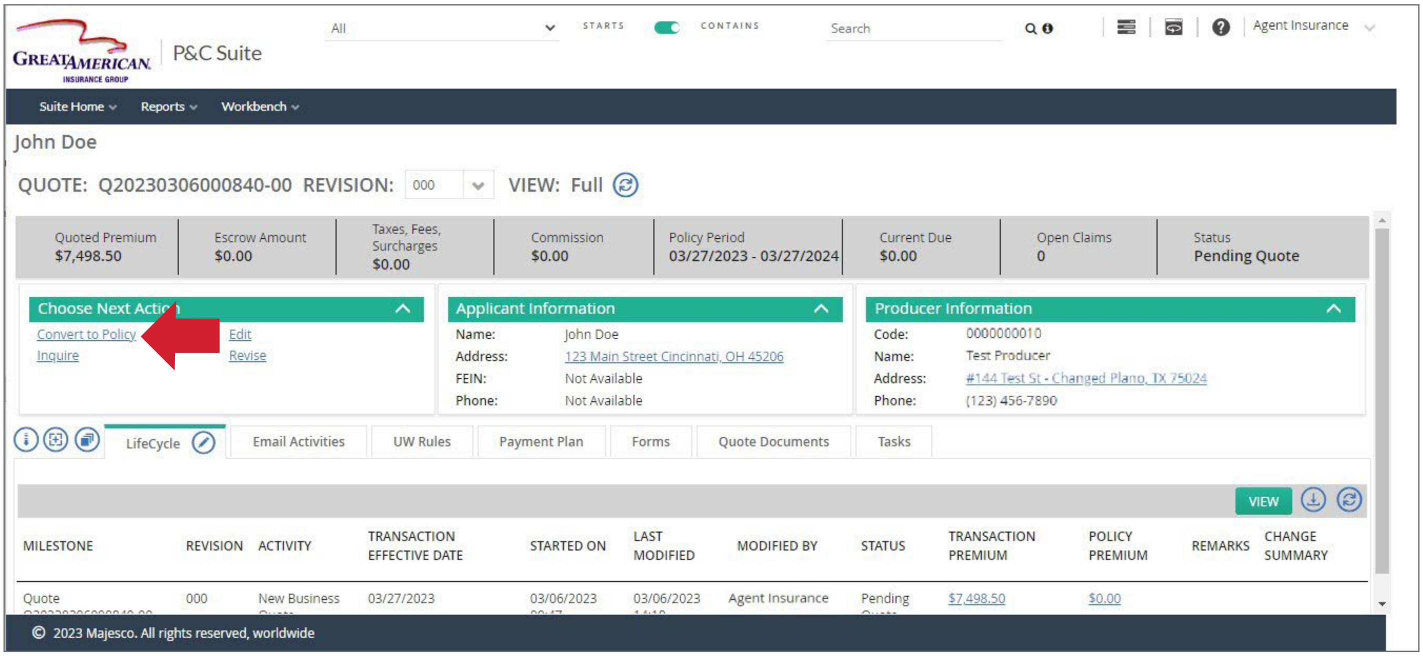

Figure 1. Dashboard.

2. On the Policy screen, you have the option to review each of the screens or simply click **CALCULATE PREMIUM**.

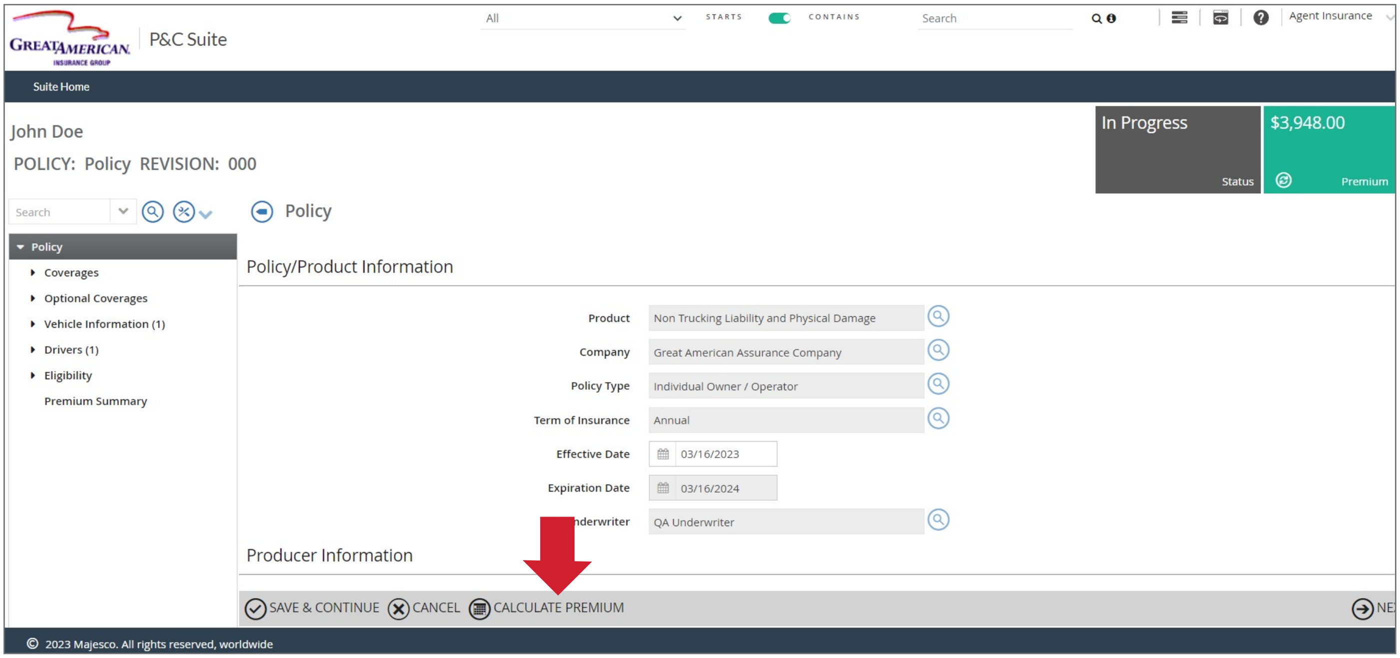

Figure 2. Calculating Premium.

3. Click **Next** when finished to return to the dashboard.

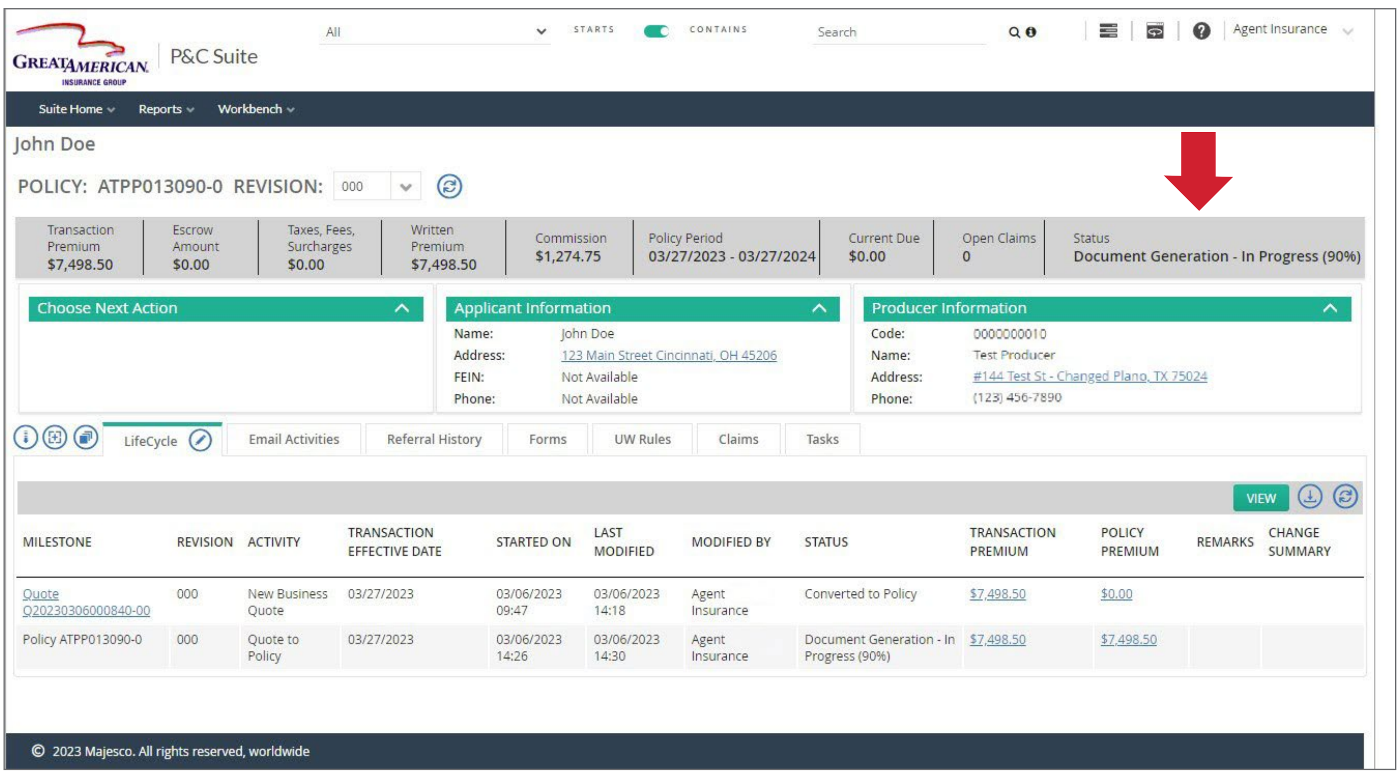

Figure 3. Status.

5. Under Choose Next Action, click **Book**.

NOTE: *For a Direct Bill policy, a down payment will be required with or without a deposit.*

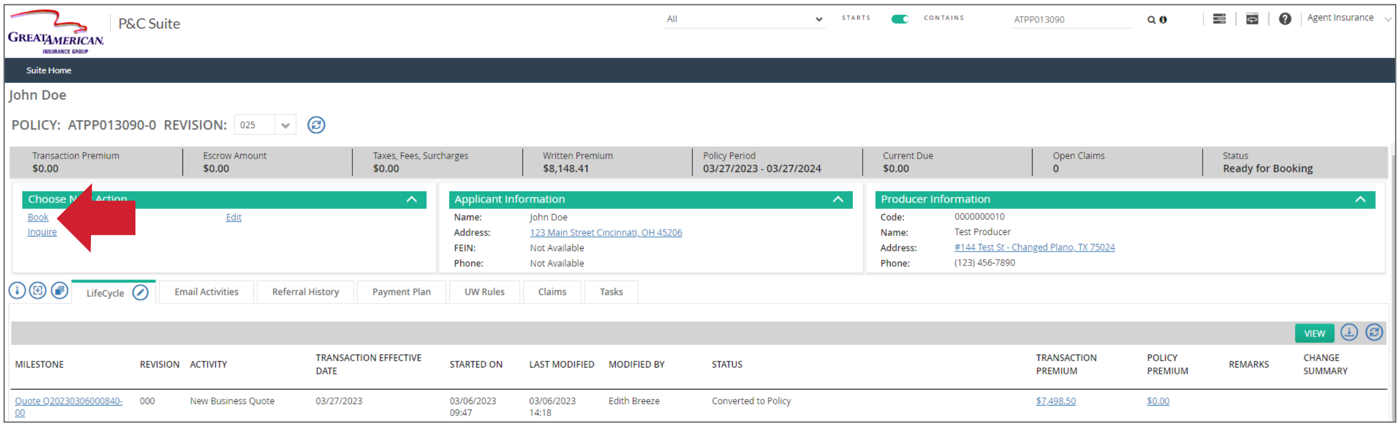

Figure 4. Book the Policy.

6. Wait for the **Status** to update to **In Force**.

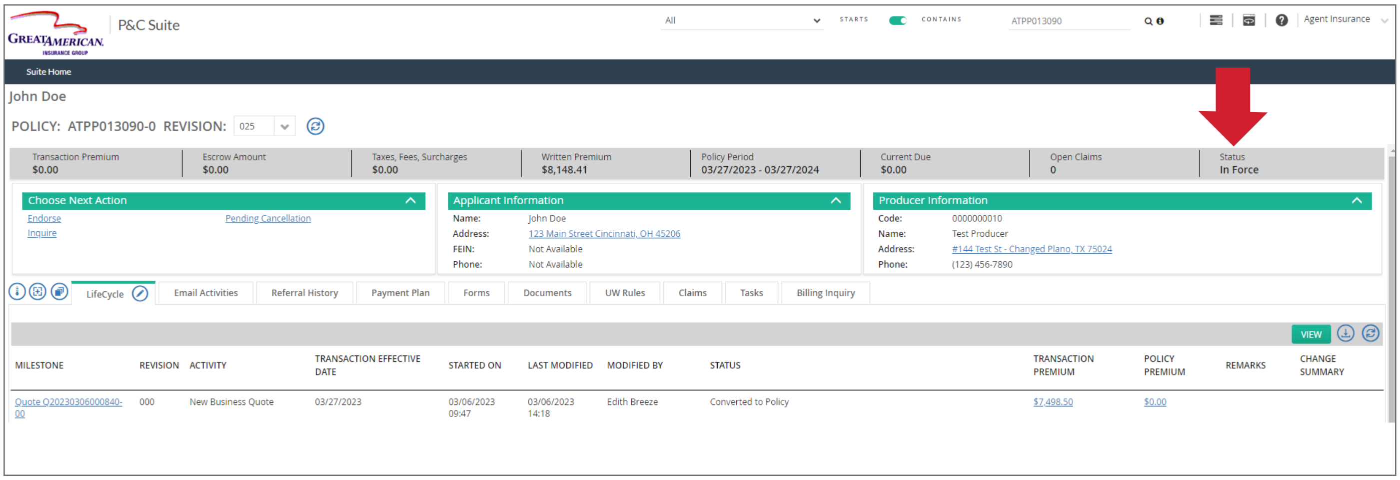

Figure 5. Status updated to In Force.

Creating a Quick Quote

Occupational Accident

General Information

Click on the link to access Great Roadmap: gaigtrucking.cloudinsurer.com

Follow these instructions to create a Quick Quote for Occupational Accident. Once a Quick Quote has been created, you can then create a Full Quote and Issue.

Login Page

1. Login to Great Roadmap using your GAIG username and password.
2. On the Create New Quote Tile, select **Occupational Accident** from the drop-down menu.
3. Click **Let's Begin**.

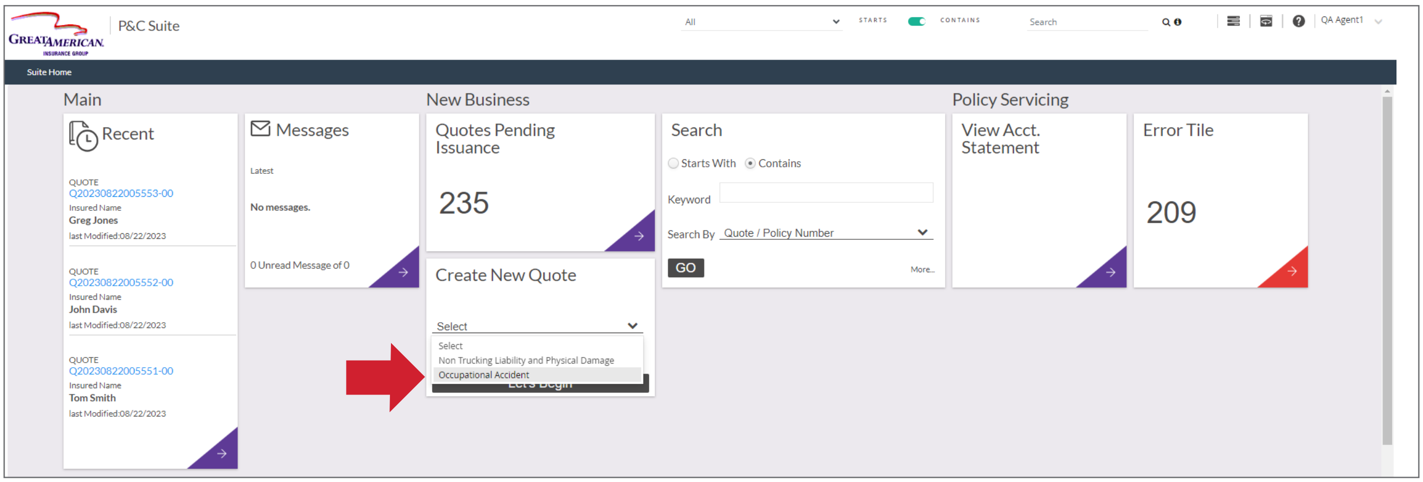

Figure 1. Home screen.

Quote/Product Information Screen

1. Enter the **Effective Date**.

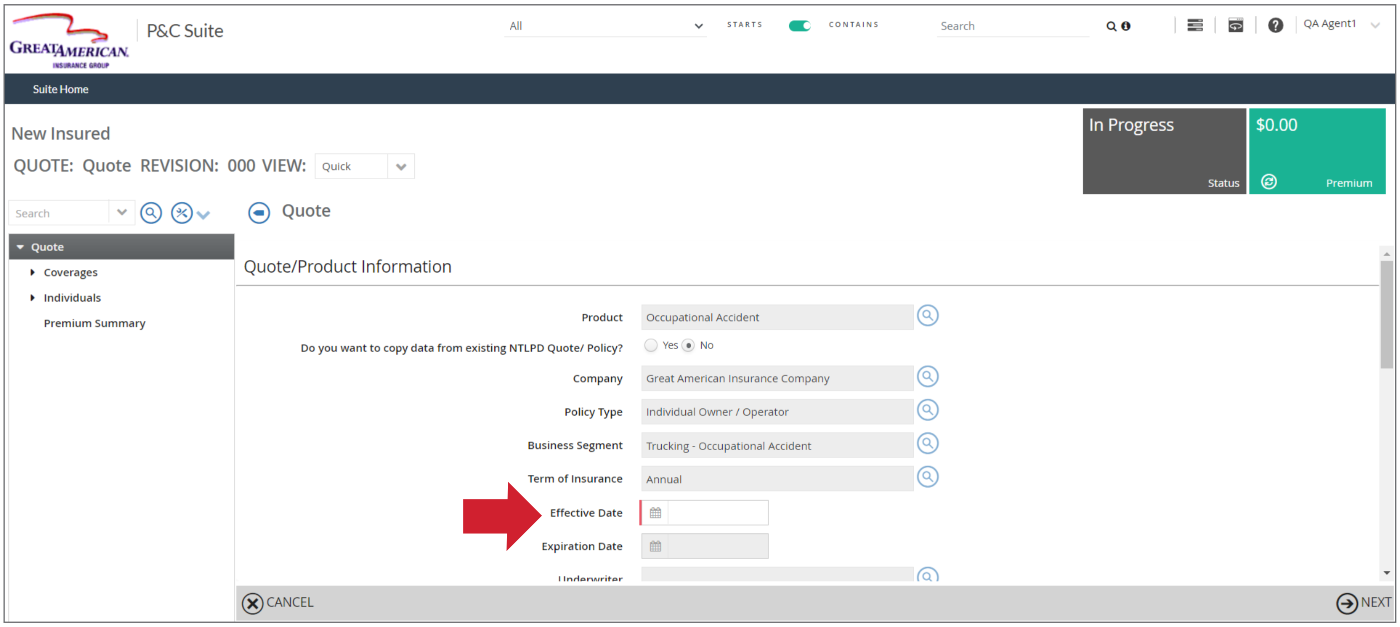

Figure 2. Enter the Effective Date.

NOTE: *Required fields are indicated by a red bar.*

NOTE: *The Effective Date can only be back-dated by 3 days.*

2. Scroll down to Policy Holder Information and enter the required information.

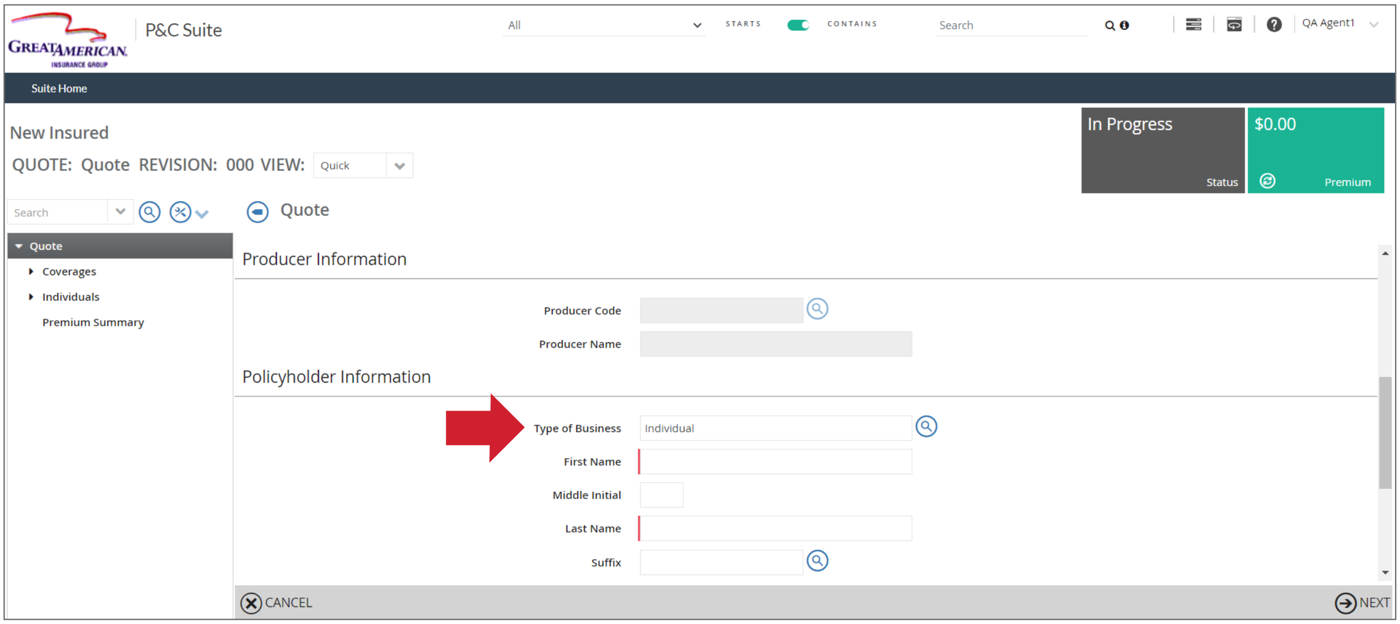

Figure 3. Policyholder Information.

NOTE: *If you enter the ZIP code first, the city and state will auto-populate.*

3. When finished, click **NEXT**.

Coverages Screen

1. Click on the **View Plan Info** to view information about the Schedule of Benefits for each plan.
2. Click the search icon (magnifying glass) to open the **Plan** pop-up window and select a plan.

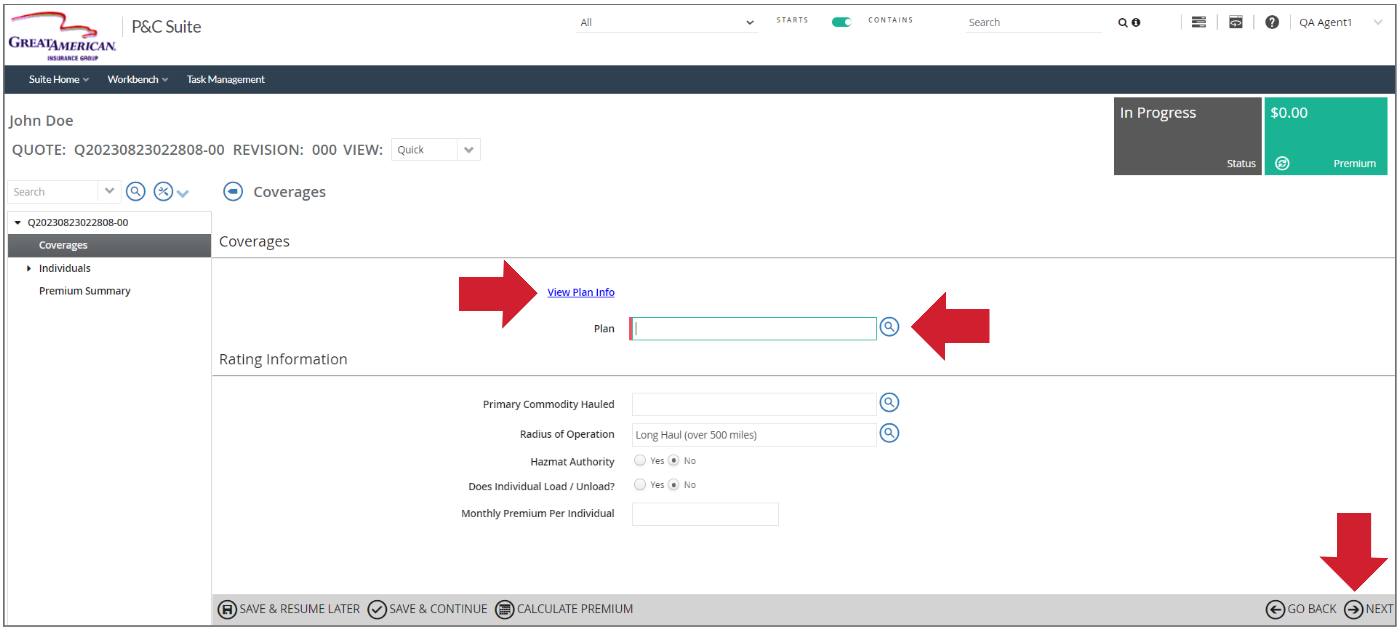

Figure 4. Coverages screen

3. Under Rating Information, do the following:
   a. Select the **Primary Commodity Hauled** from the pop-up window.
   b. Select the **Radius of Operation** from the pop-up window.
   c. Select **Yes/No** for **Hazmat Authority**.
   d. Select **Yes/No** for **Does the Individual Load/Unload**?
4. When finished, click **NEXT**.

Individuals Screen

1. Click **ADD** to add an individual. Up to ten individuals can be added.

NOTE: *The first individual will default to the owner/operator.*

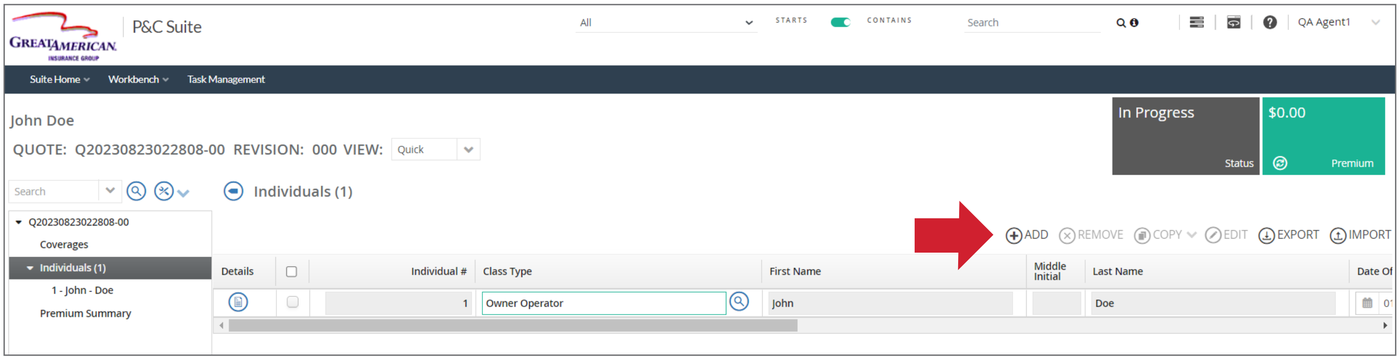

Figure 5. Individuals screen shown with an individual already added.

2. On each individual's screen, enter the **Date of Birth**.

NOTE: *For quick quote, the Date of Birth is the only required field for each individual. All other information (e.g. CDL State, CDL #, etc.) will be required at full quote.*

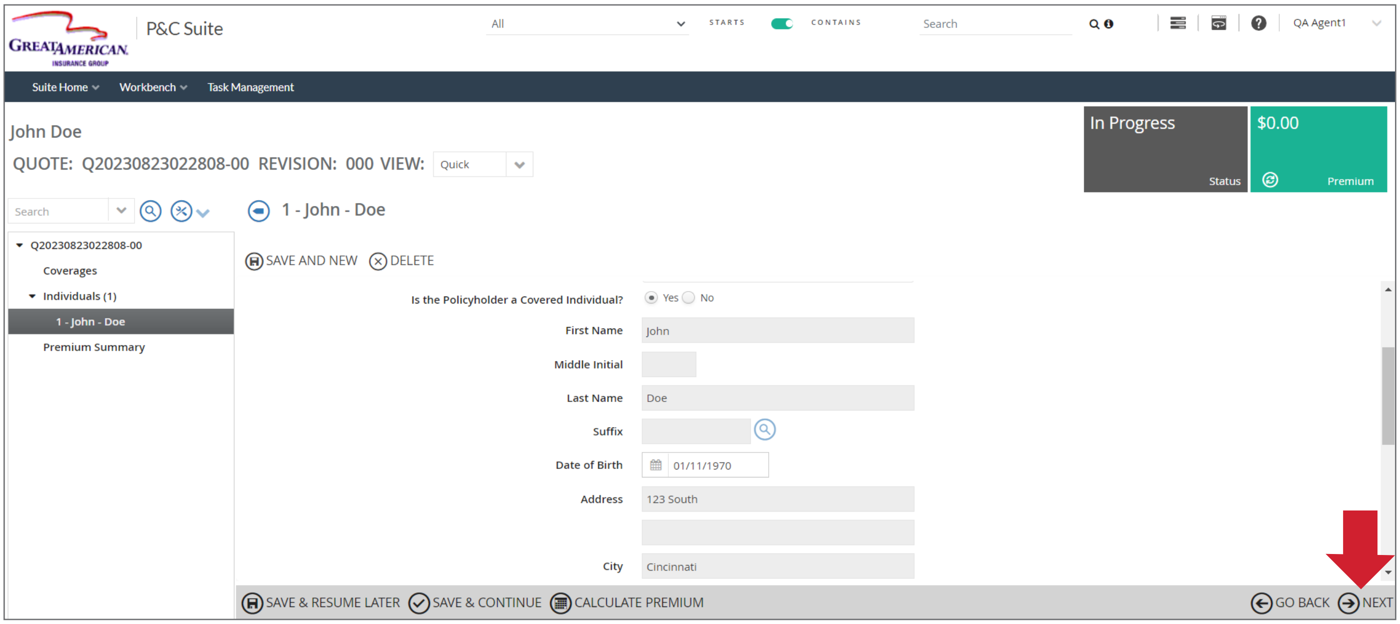

Figure 6. Enter the Individual's Date of Birth.

3. Click **NEXT** and continue adding individuals as needed.

NOTE: *For additional individuals, you will need to select the Class Type (Owner Operator or Passenger) and enter any required information (Associated Owner Operator, Name, DOB, and Address).*

4. When finished, click **DONE WITH INDIVIDUALS**.

Premium Summary Screen

1. On the Premium Summary screen, click **Calculate Premium** to see the Premium Summary.

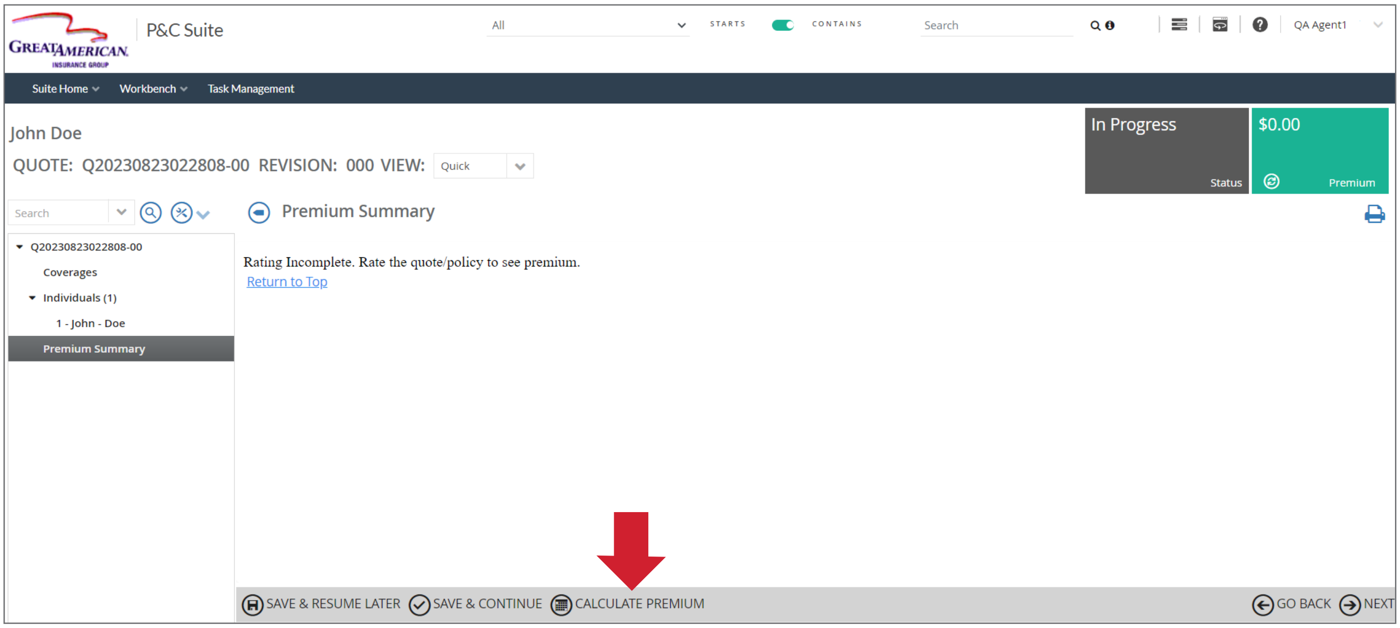

Figure 7. Premium Summary screen before calculating the premium.

2. When finished, click **NEXT** to go to the Dashboard. From there you can convert the Quick Quote to a Full Quote.

NOTE: *On the dashboard, wait for the status to update to Pending Quote.*

Converting a Quick Quote to a Full Quote

Occupational Accident

General Information

Once a Quick Quote has been created, you can convert it to a Full Quote from the dashboard. To do a Full Quote you will need to enter billing information.

On the dashboard, under Choose Next Action, click **Convert to Full Quote**.

NOTE: *You have to the option to make changes to the Quick Quote by clicking Edit or Revise. Clicking Edit will allow you to make changes but will not keep a revision history. Clicking Revise will allow you to make changes and the system will create a new quote version. The user can then select which version they want to use to convert to a policy. Inquire will give you the ability to review the quote but not make any changes.*

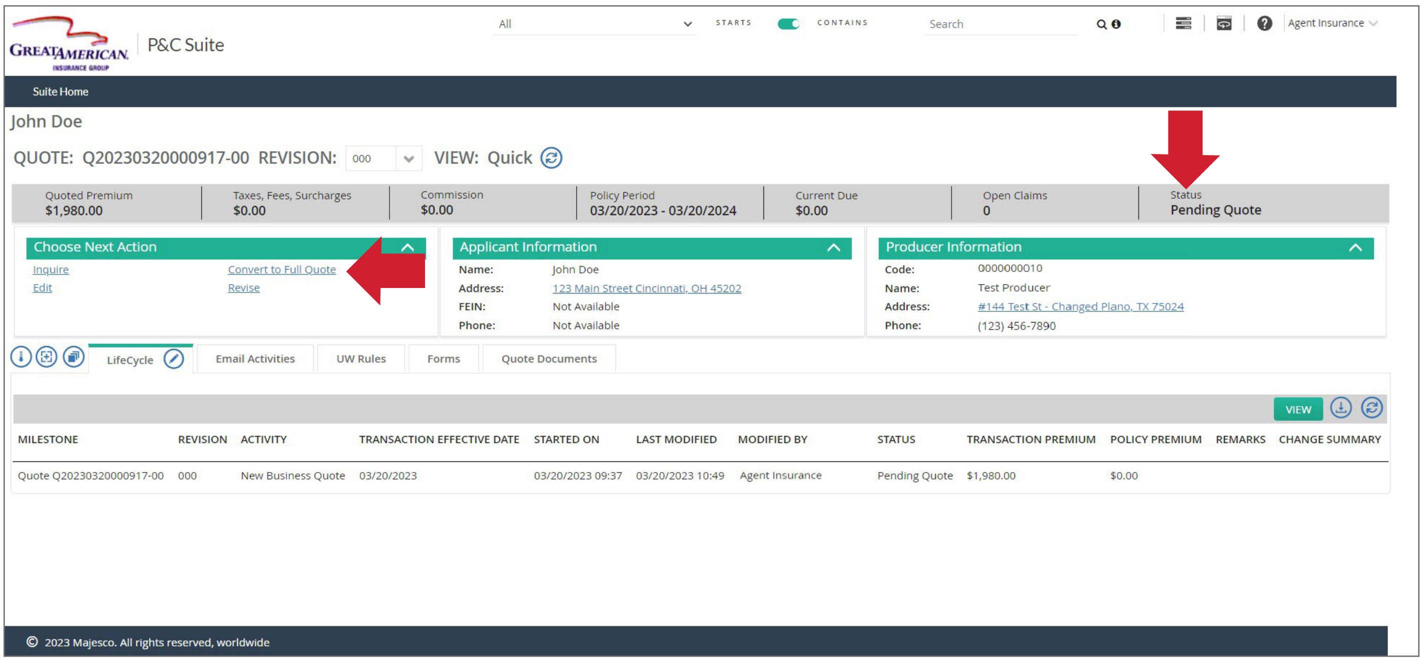

Figure 1. Policy Dashboard showing a Pending Quote status.

Billing Information and Coverage Review

1. On the Quote screen, scroll down to the Billing Information section and select a **Billing Option** and **Payment Plan**.

NOTE: *For Direct Bill, you need to verify the billing address and make a payment in the system before you can bind and issue the policy. For Agency Bill, the Billing Information fields will auto-populate and the agent will be responsible for collecting payment.*

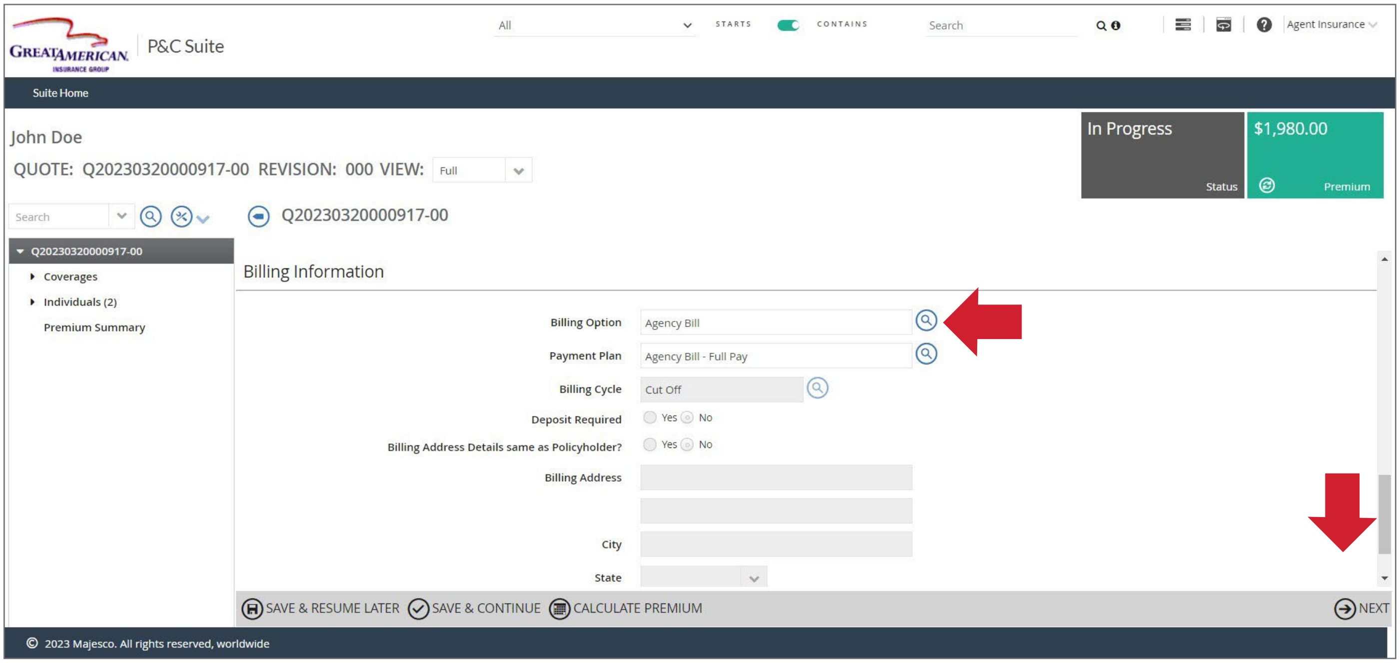

Figure 2. Billing Information.

2. Click **NEXT** when finished entering the Billing Information to review or make changes to the Coverages screen.
3. When finished, click **NEXT** to review or make changes to the Individuals screen.

4. When finished, click **NEXT** to go to the Premium Summary screen.

Print Summary Screen

1. On the Premium Summary screen, click **NEXT** or **SAVE AND CONTINUE** to go to the dashboard.

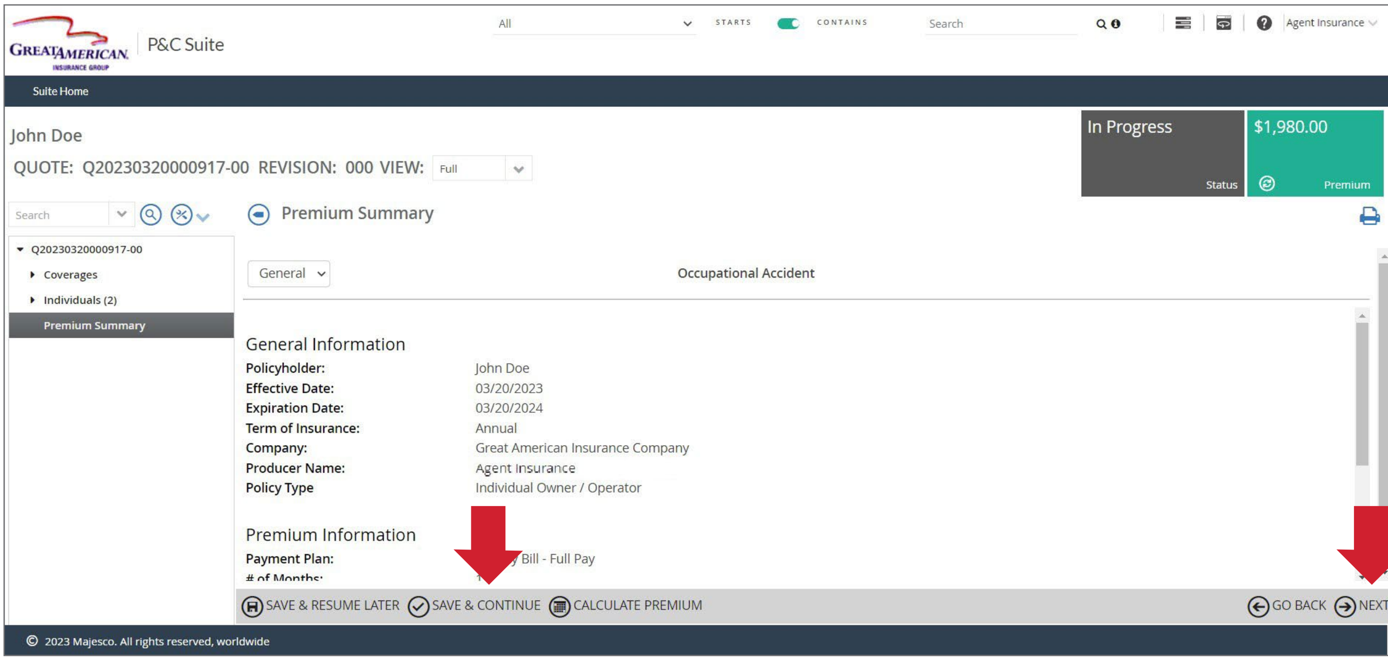

Figure 3. Premium Summary Screen.

2. On the Dashboard, wait for the **Status** to update to **Pending Quote**. From here you can convert the Full Quote to a Policy.

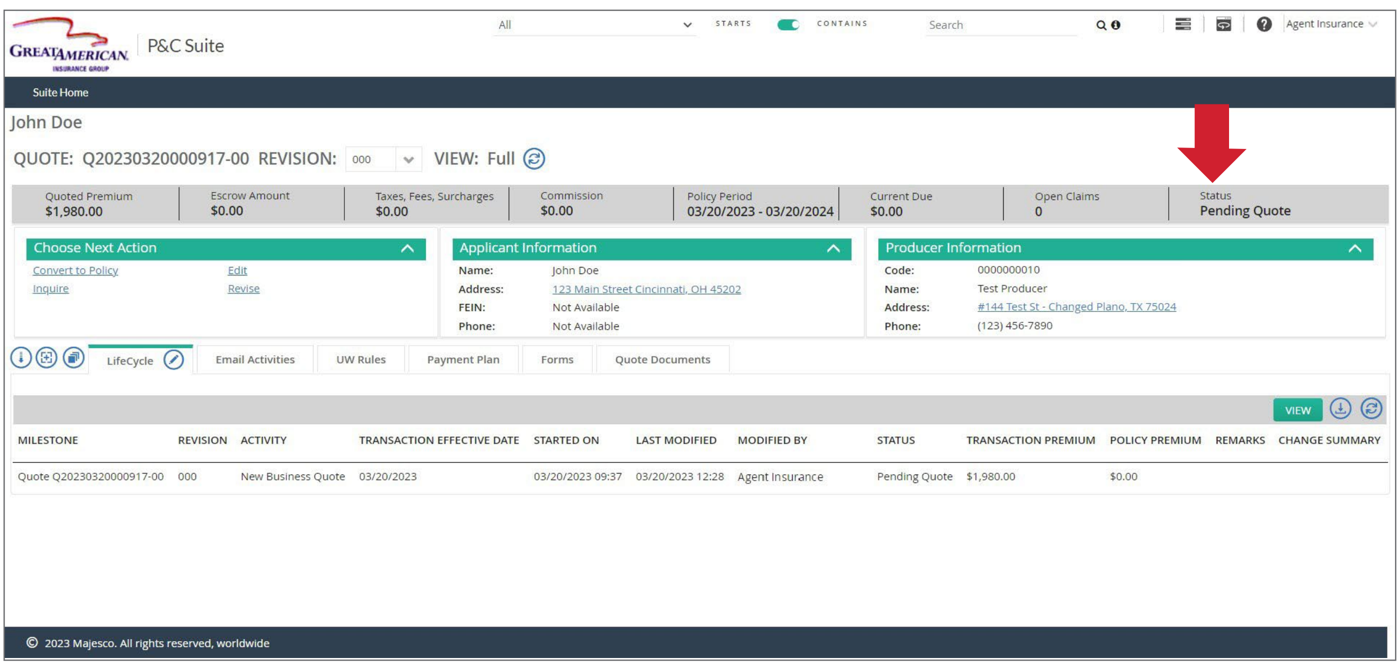

Figure 4. Dashboard with a Full Quote ready to be converted to a policy.

Converting a Full Quote to a Policy

Occupational Accident

General Information

Once a Full Quote has been created and accepted, you can convert it to a Policy from the dashboard.

1. On the dashboard, under Choose Next Action, click **Convert to Policy**.

NOTE: *You have to the option to make changes to the Quick Quote by clicking Edit or Revise. Clicking Edit will allow you to make changes but will not keep a revision history. Clicking Revise will allow you to make changes and the system will create a new quote version. The user can then select which version they want to use to convert to a policy. Inquire will give you the ability to review the quote but not make any changes.*

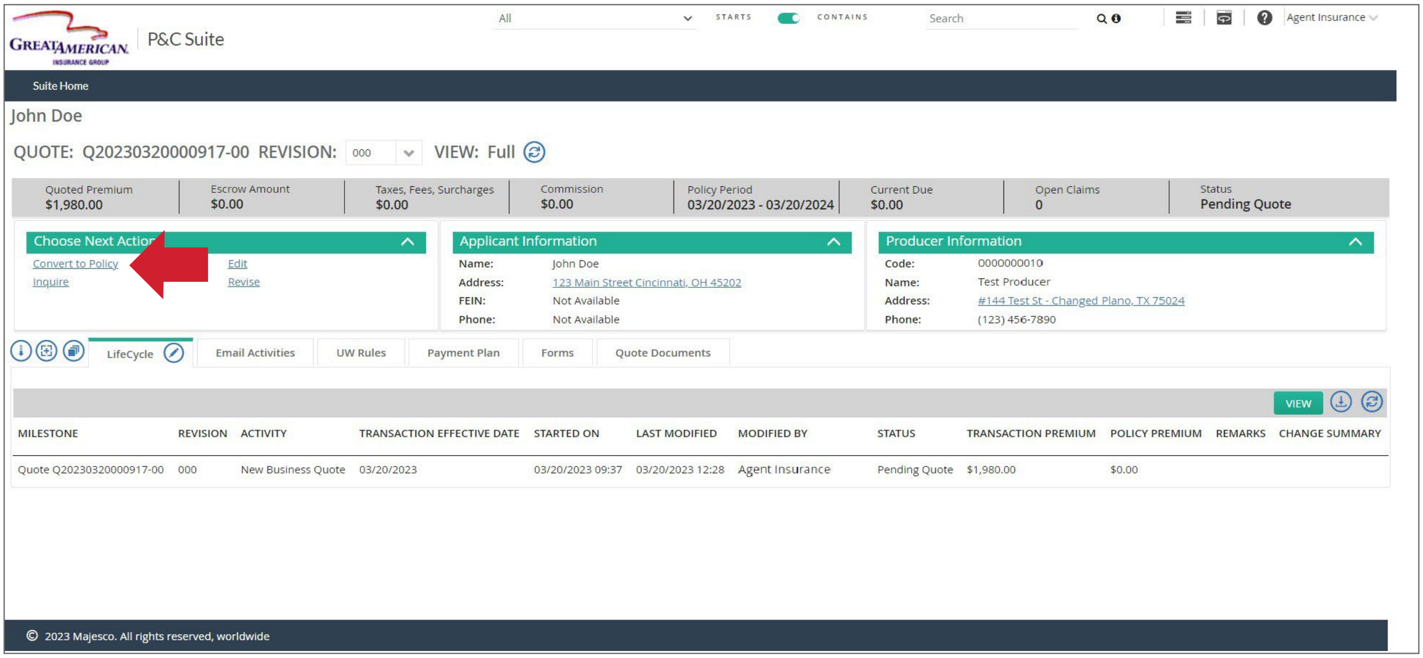

Figure 1. Policy Dashboard showing a Pending Quote status.

2. On the Policy Screen, you have the option to review each of the screens by clicking **NEXT**, or simply click **SAVE AND CONTINUE** to jump to the dashboard.

NOTE: *If you selected Direct Bill, the system will require you to enter any billing information on the Payment Plan tab on the dashboard.*

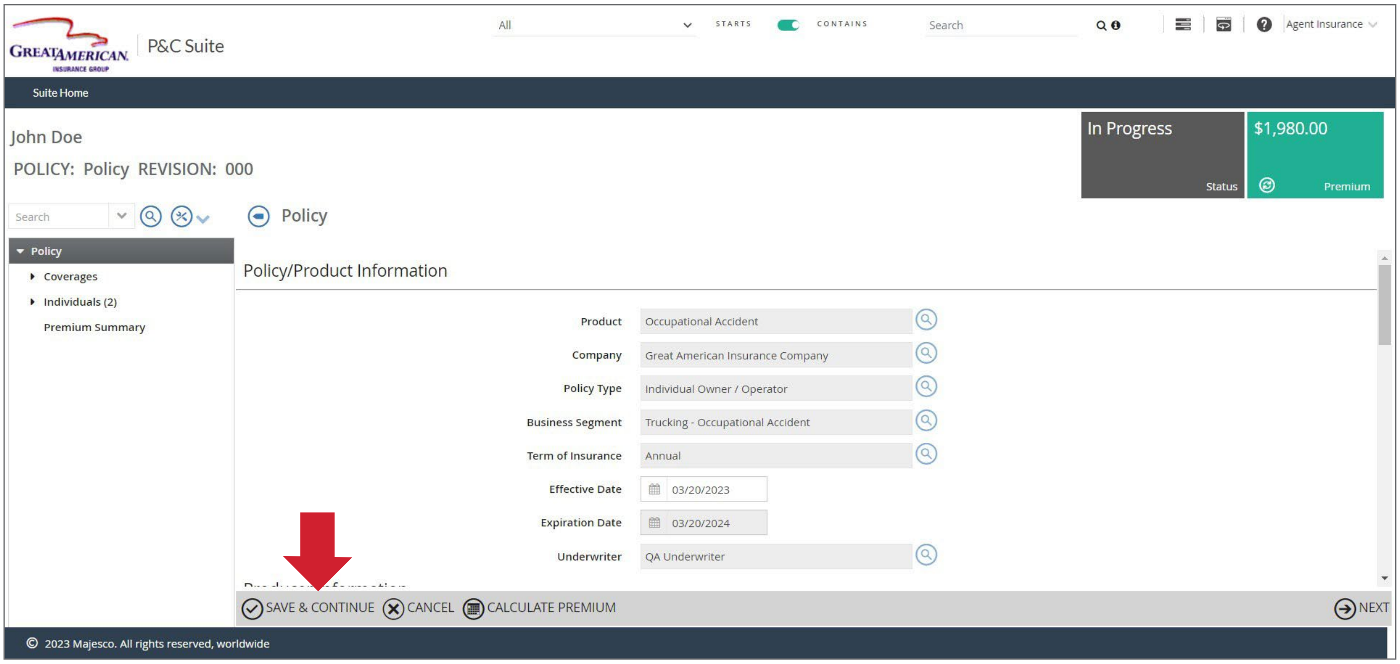

Figure 2. Policy screen.

3. On the dashboard, wait for the Status to update to **Ready for Booking**.

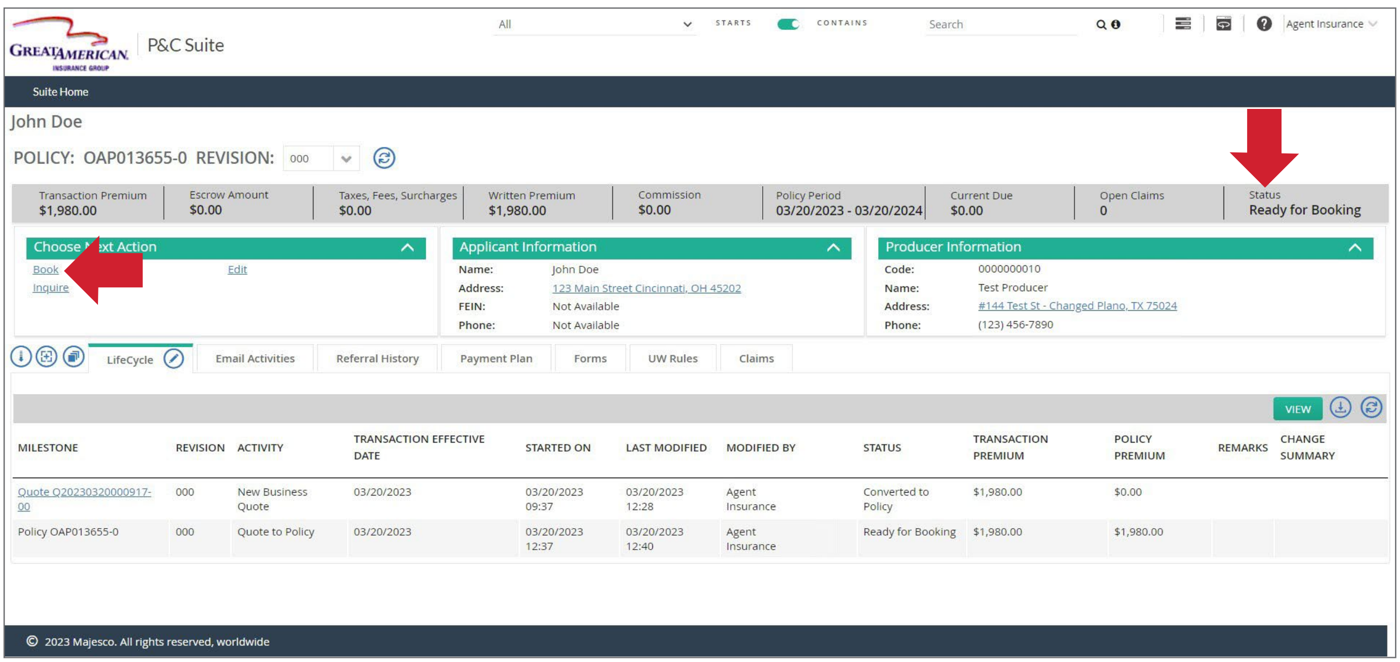

Figure 3. Dashboard showing the policy is ready for booking.

4. Under Choose Next Action, click **Book**.

NOTE: *You will now be able to create endorsements like adding/removing drivers and passengers.*

Creating an Endorsement

Trucking

General Information

Once a policy has been issued, you can now create an Endorsement.

Searching for a Policy

1. On the home screen, in the Search tile, search by **Quote/Policy Number,** or **Insured Name/DBA**.
2. Select **Starts With** or **Contains**.
3. Enter the **Keyword** (i.e. Policy Number, Insured Name, or Claim Number).
4. Click **GO**.

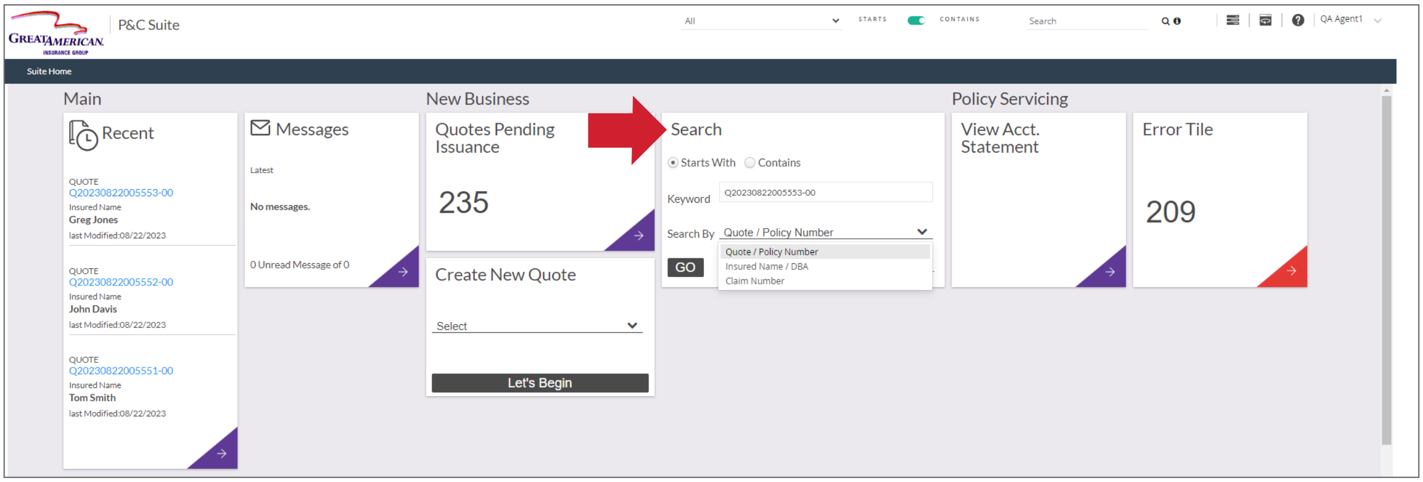

Figure 1. Searching from the Home screen.

Creating an Endorsement

1. On the Dashboard, under Choose Next Action, click **Endorse**.

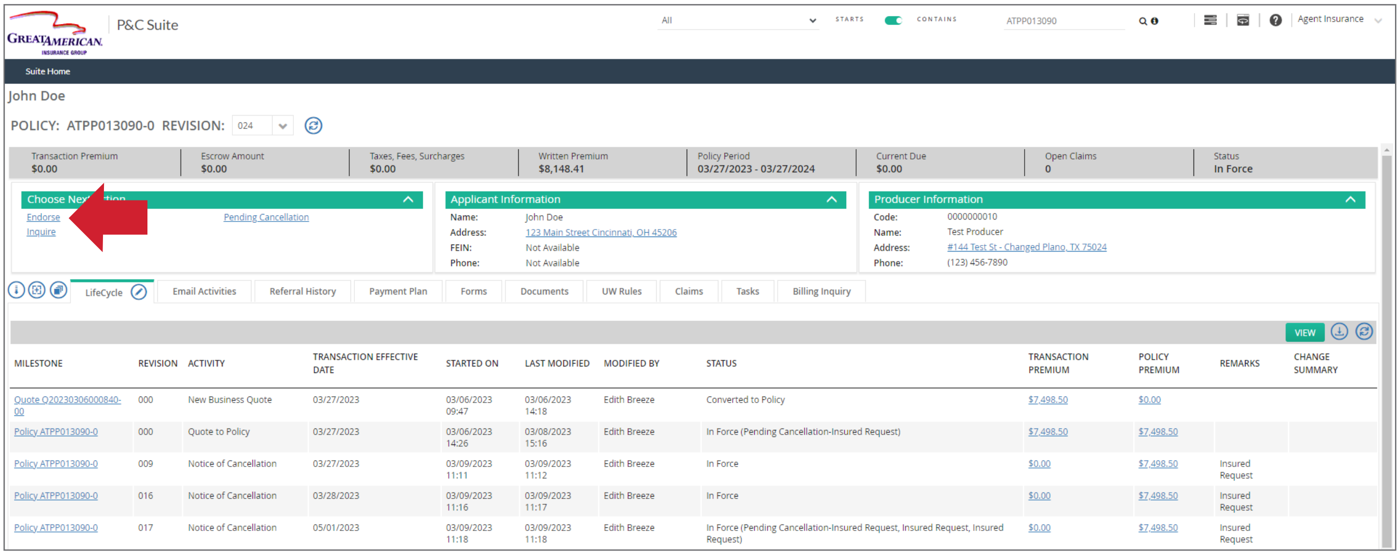

Figure 2. Dashboard.

2. On the Policy screen, enter the **Transaction Effective Date** and enter a **Remark** stating what the endorsement is changing on the policy.

NOTE: *Endorsements cannot be backdated more than 3 days or future dated more than 120 days. Transaction Effective Dates outside of this must be submitted to the underwriter for review.*

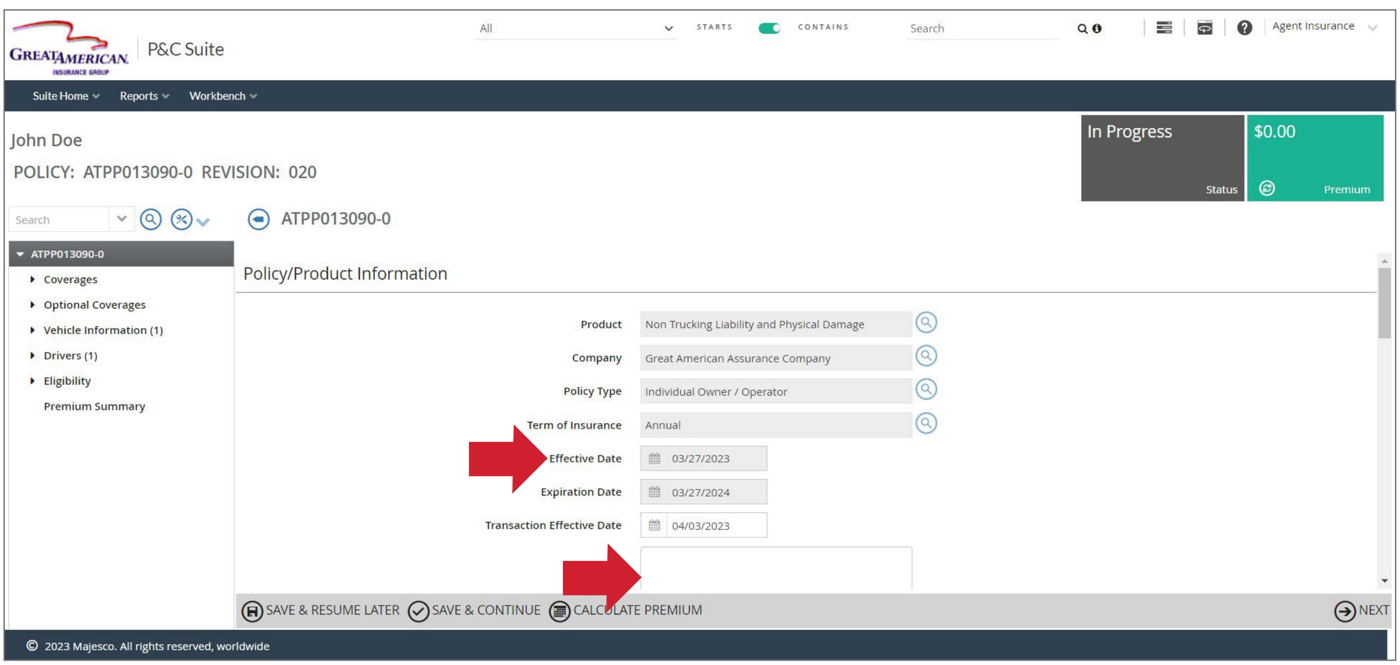

Figure 3. Policy screen with a Transaction Effective Date.

3. Review the Insured Information and make changes as needed.

NOTE: *You can review each screen and make any changes as needed without having to go in and out of the policy if there are multiple changes needed.*

4. For endorsements, you can do one of the following:
    a. Click **NEXT** to navigate through each of the screens to review or make changes as needed.
    b. Click **Save and Continue** to return to the dashboard.

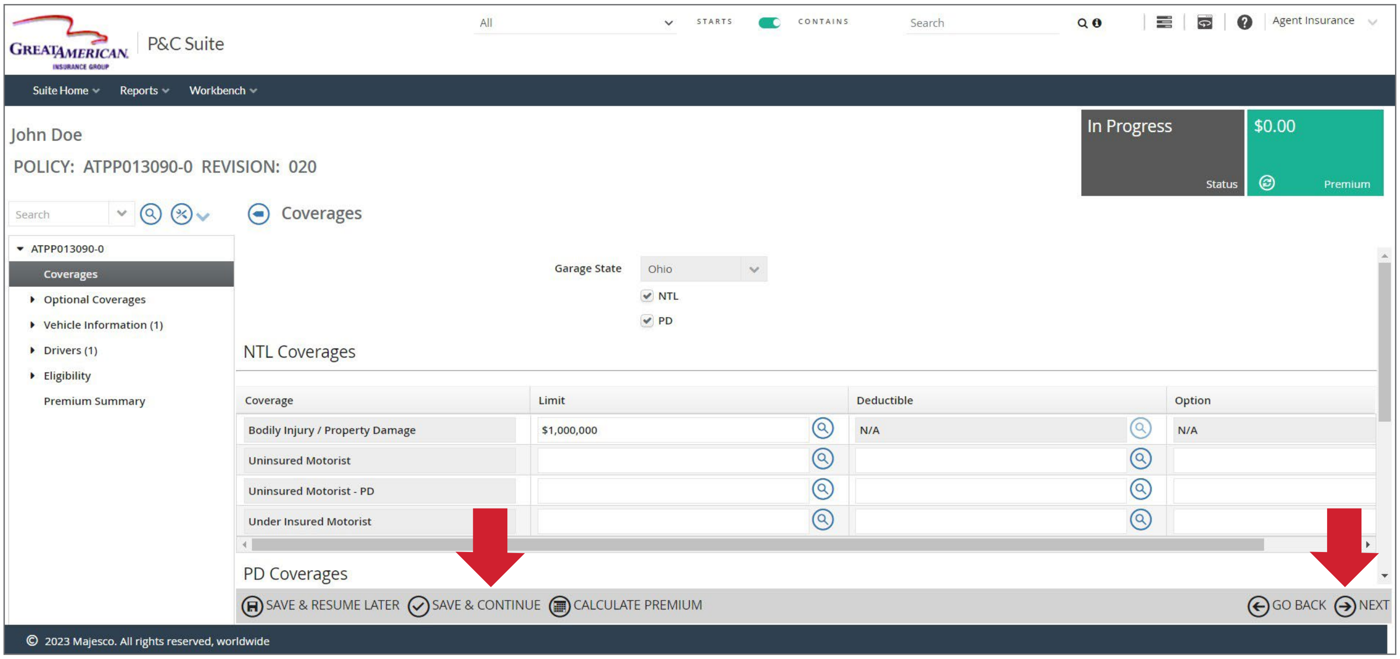

Figure 4. Click NEXT or Save and Continue

5. Wait for the **Status** to update to **Ready for Booking**.

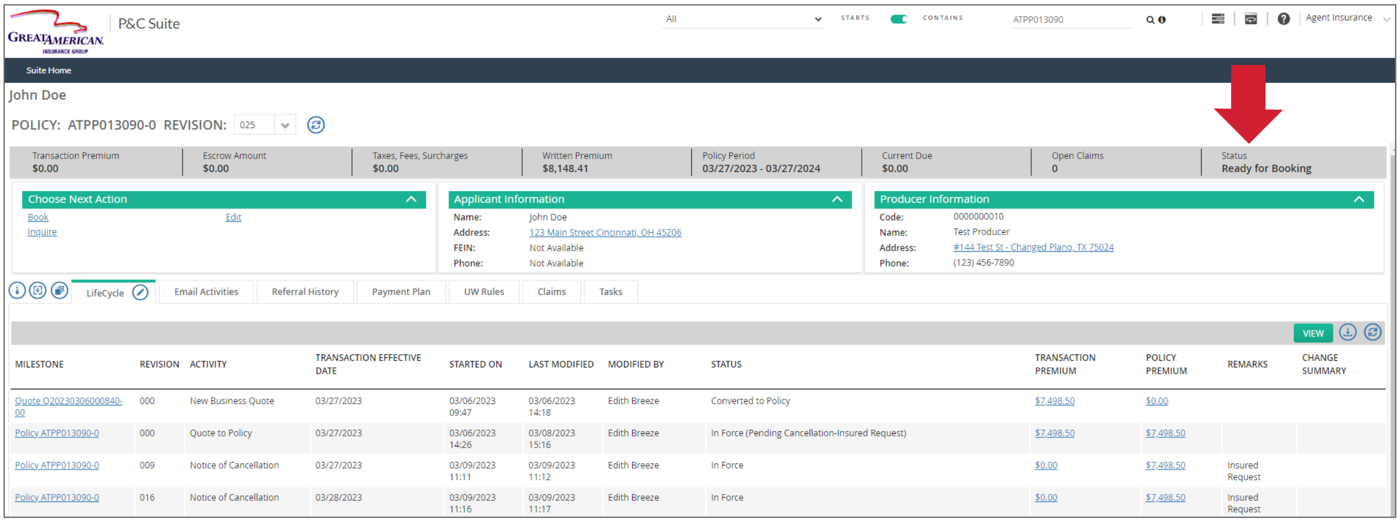

Figure 5. Dashboard with status update.

6. Under Choose Next Action, click **Book**.

NOTE: *Money baring endorsements will require payment prior to booking.*

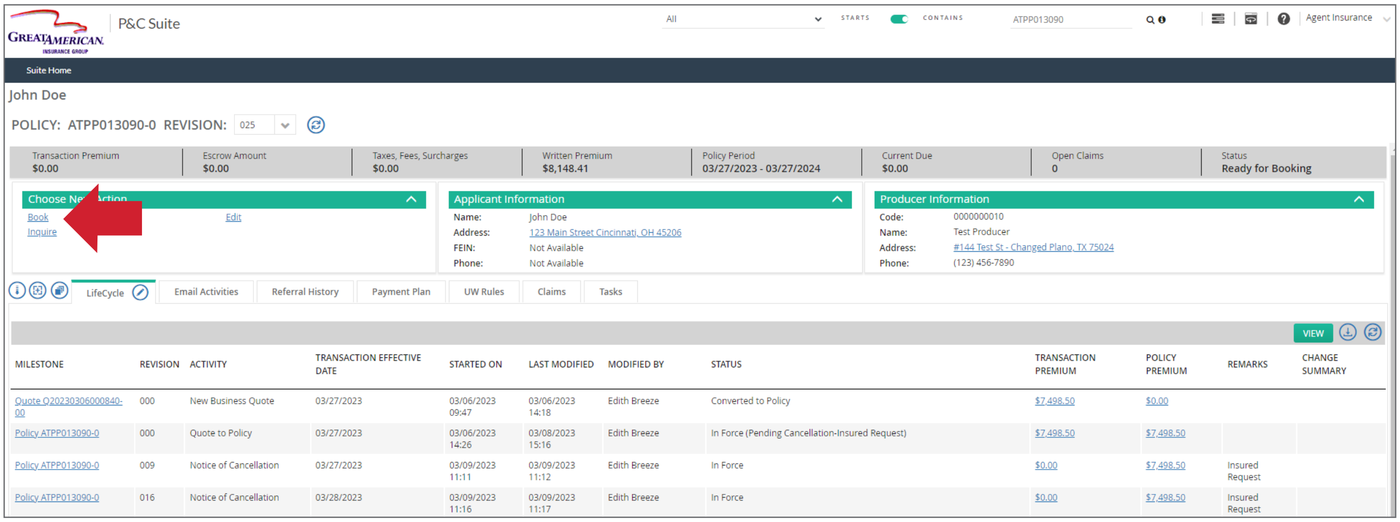

Figure 6. Book the Endorsement.

7. Wait for the **Status** to update to **In Force**.

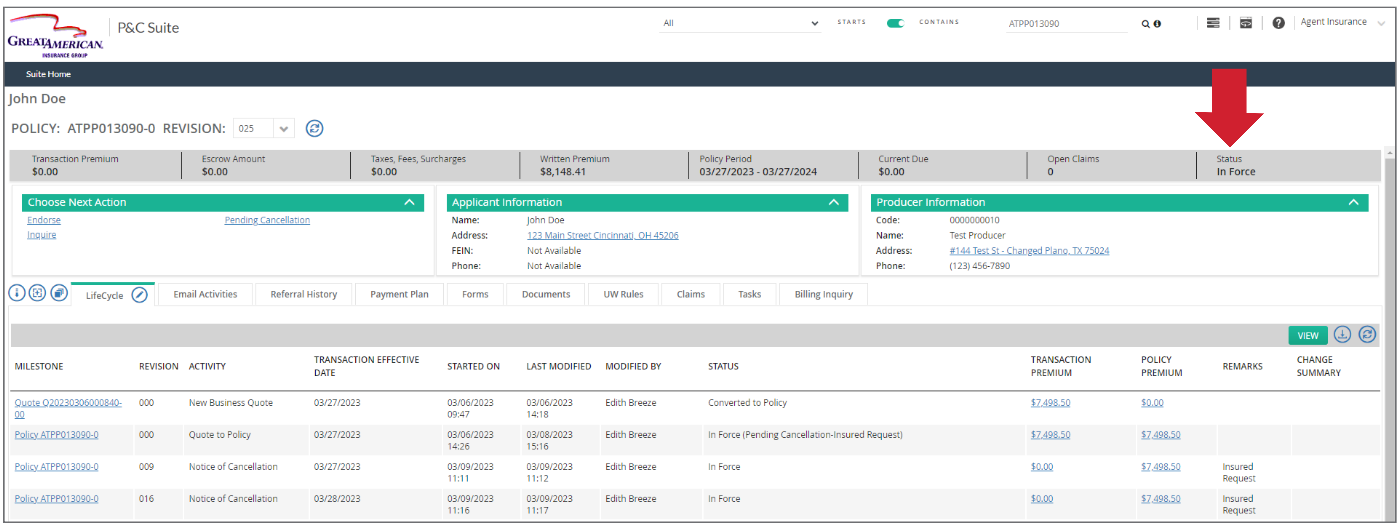

Figure 7. Status updated to In Force.

Cancelling a Policy

Trucking

General Information

Once a policy has been issued, you can now submit for Cancellation.

Searching for a Policy

1. On the home screen, in the Search tile, search by **Quote/Policy Number or Insured Name/DBA**.
2. Select **Starts With** or **Contains**.
3. Enter the **Keyword** (i.e. Policy Number or Insured Name).
4. Click **GO**.

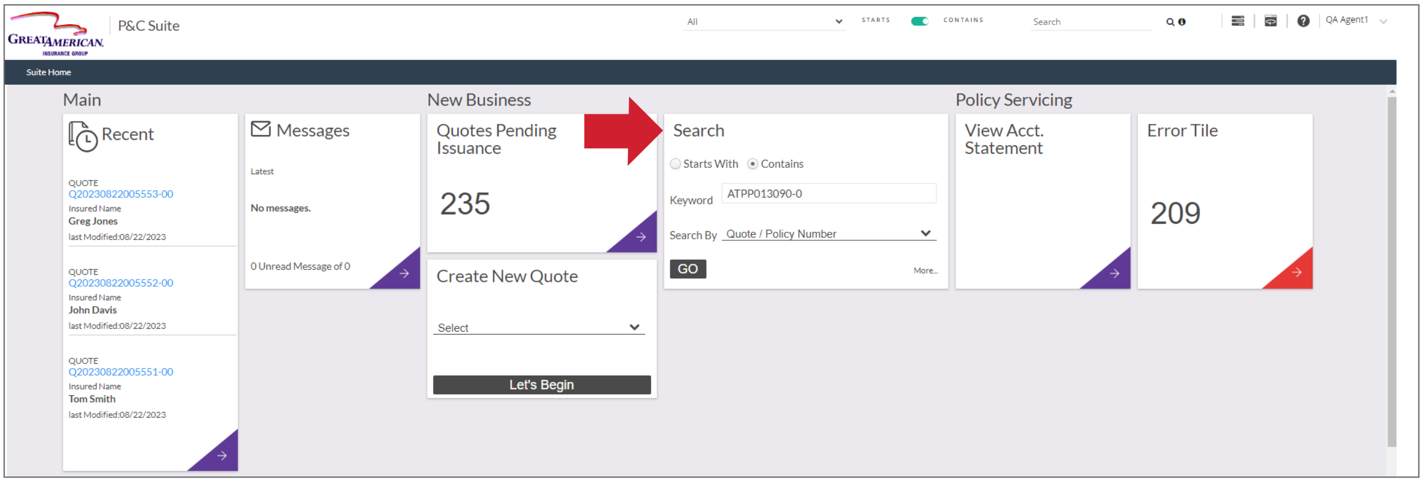

Figure 1. Searching from the Home screen.

Cancelling a Policy

1. On the Dashboard, under Choose Next Action, click **Pending Cancellation**.

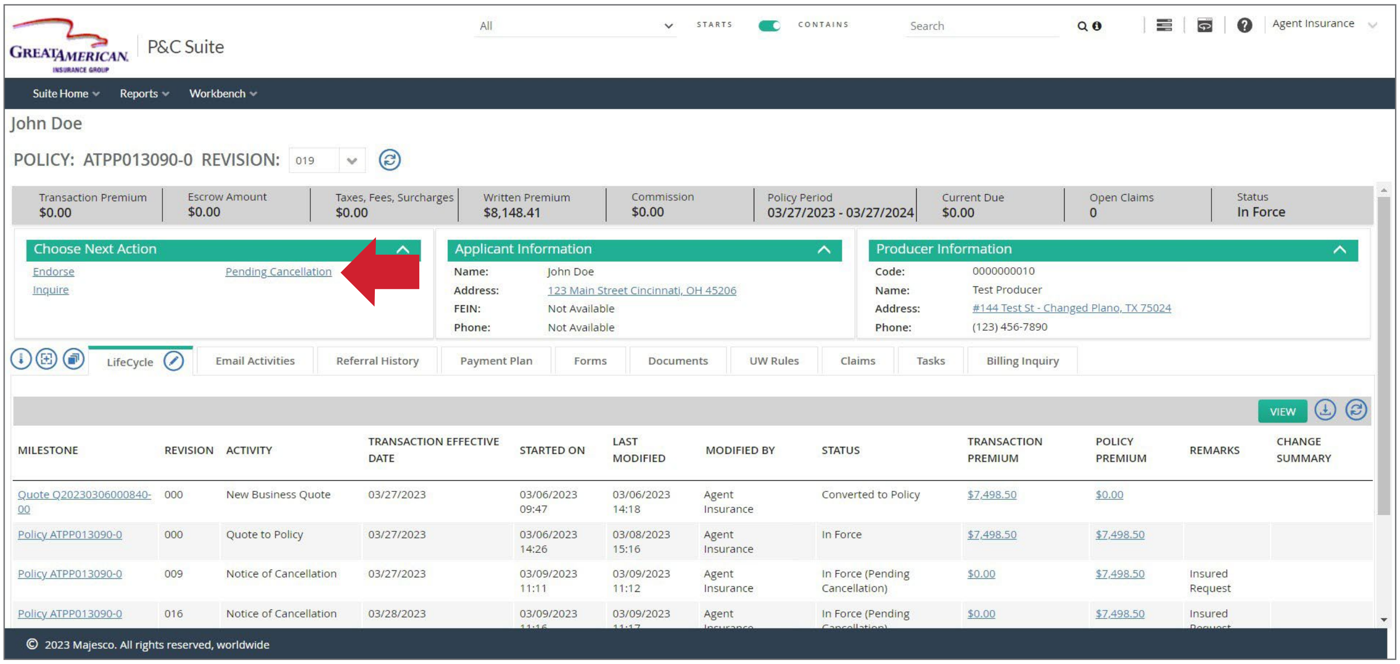

Figure 2. Dashboard.

2. On the Policy screen, enter the **Transaction Effective Date**.

NOTE: *The Transaction Effective Date cannot be backdated more than 3 days or future dated more than 120 days.*

3. Select a **Cancel Reason** from the pop-up window.

NOTE: *If the cancel reason is at the Insured's request, the policy can be cancelled the day of. If the cancel reason is Non-Payment of Premium, the system will submit a request to ODEN which would then return a date the policy can be legally cancelled.*

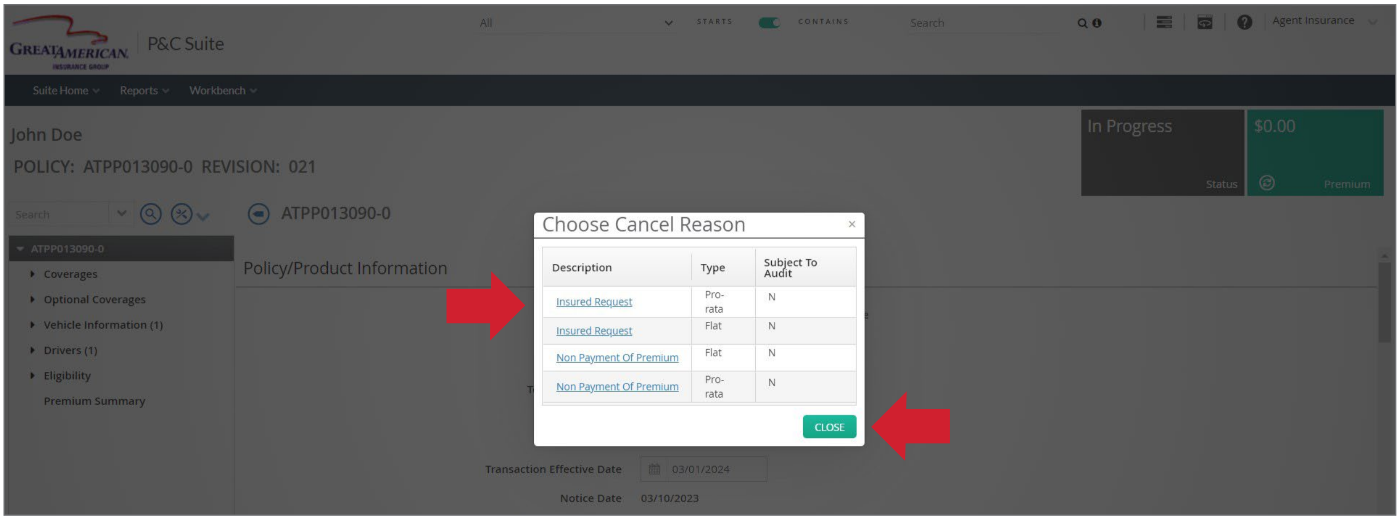

Figure 3. Select a Cancel Reason.

4. Click **NEXT**.
5. For Cancellations, you can do one of the following:
    a. Click **NEXT** to navigate through each of the screens to review.
    b. Click **Save and Continue** to return to the dashboard.

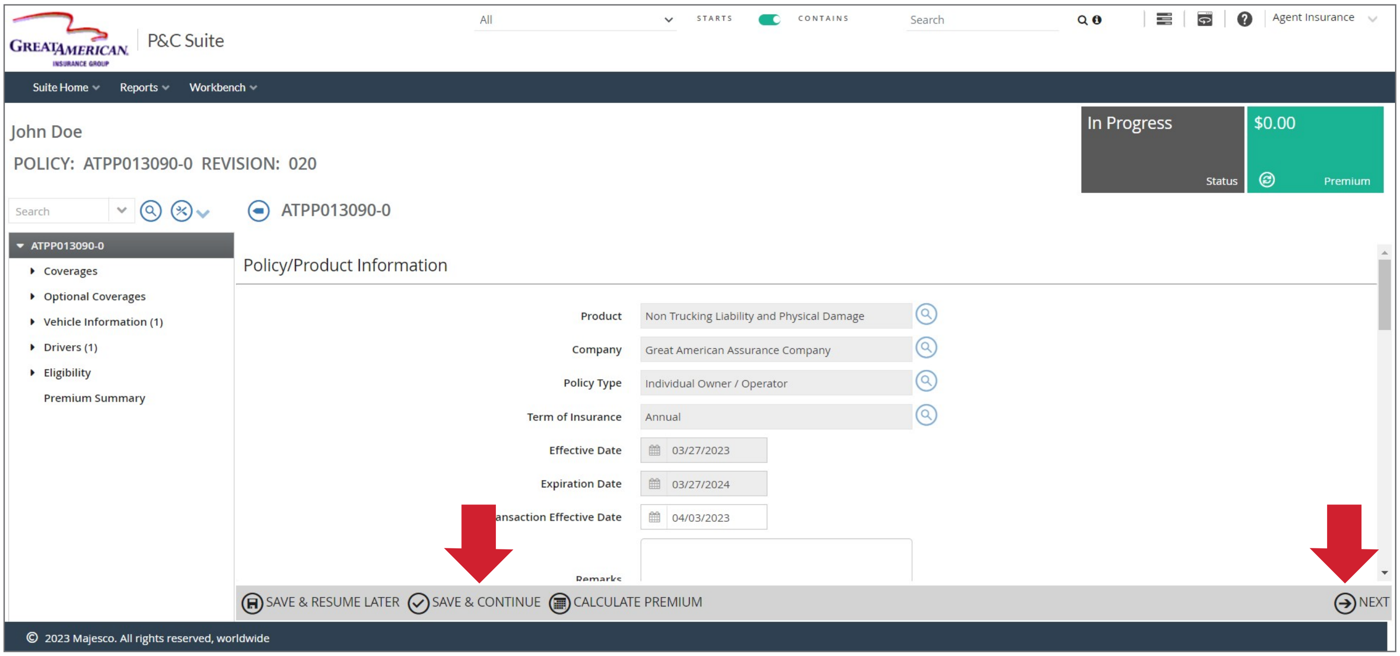

Figure 4. Click NEXT or Save and Continue

6. Wait for the **Status** to update to **Ready for Booking**.

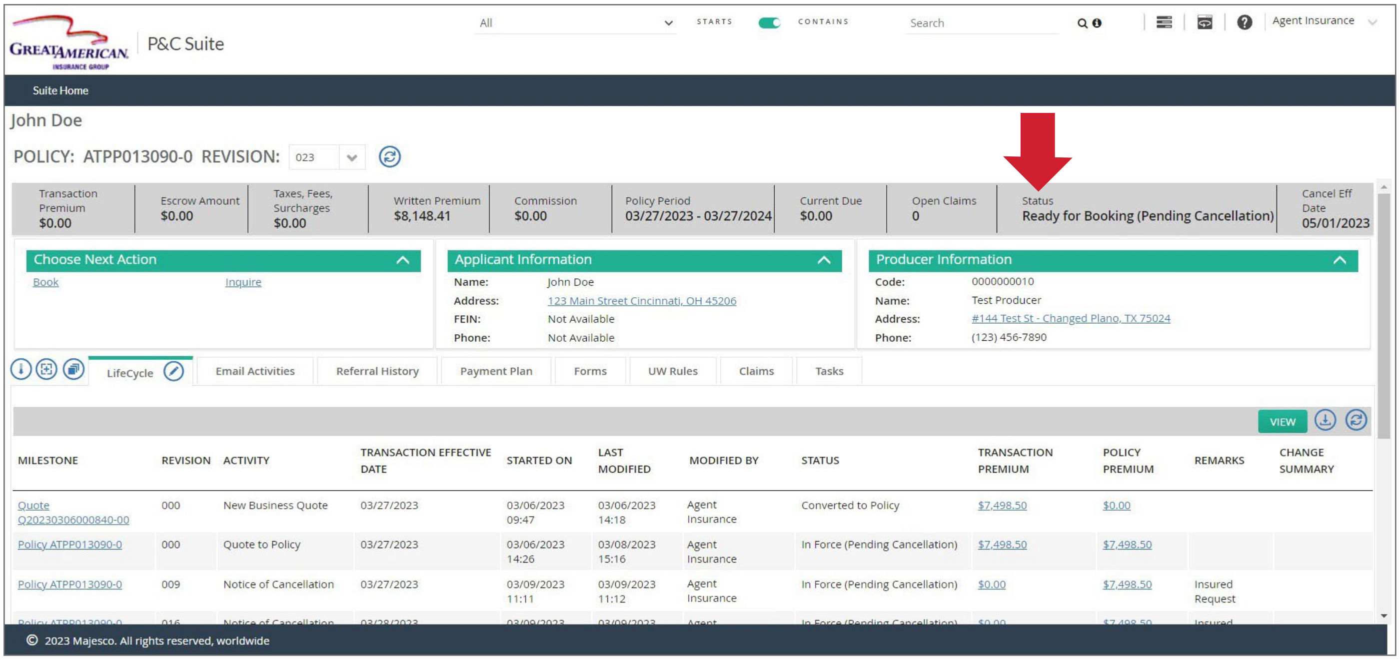

Figure 5. Dashboard with status update

7. Under Choose Next Action, click **Book**.

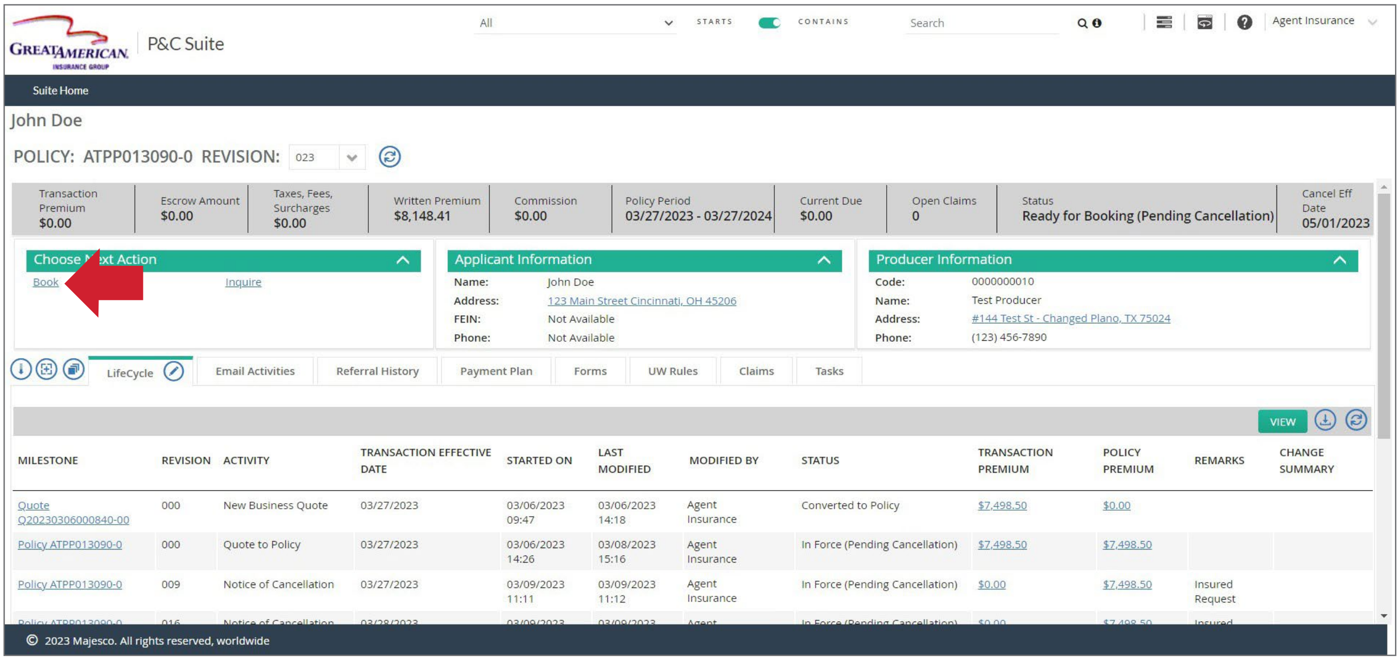

Figure 6. Book Cancellation

8. Wait for the **Status** to update to **In Force (Pending Cancellation)**.

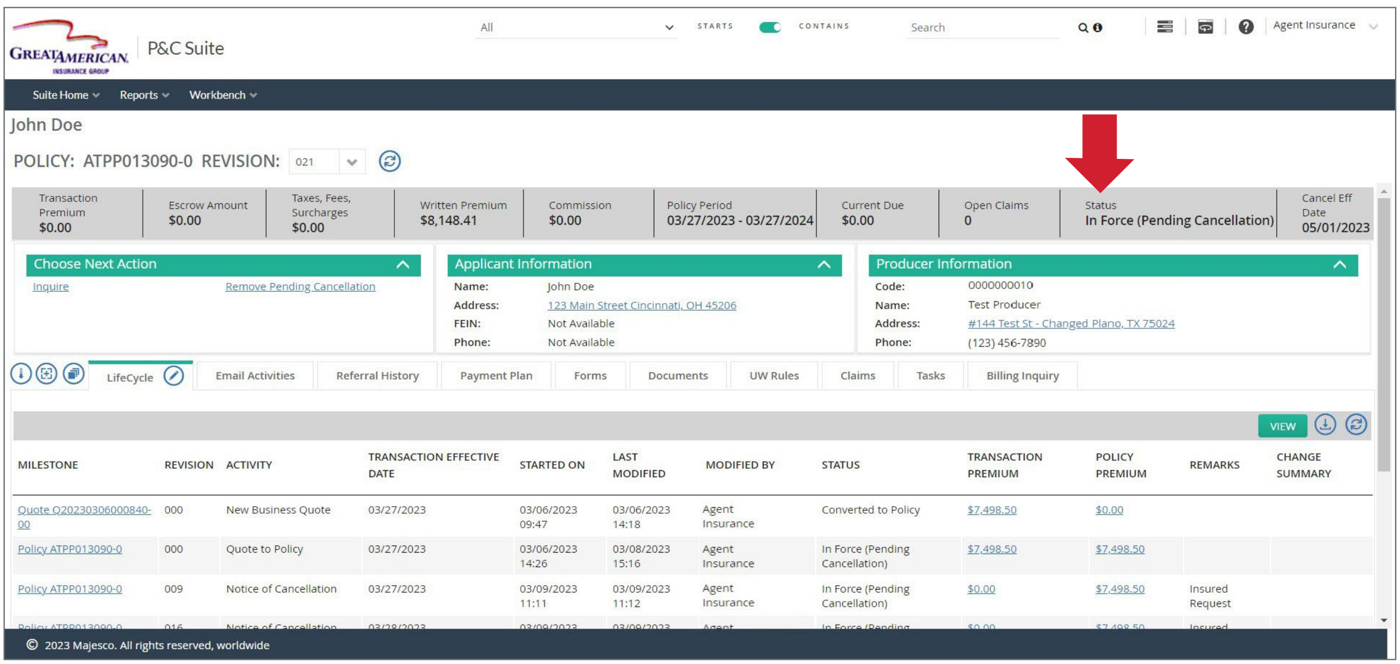

Figure 7. Cancellation In Force.

Direct Bill

Trucking

General Information

When doing Direct Bill for a policy, you will be required to enter the billing information on the Payment Plan tab of the dashboard.

Once you have converted a **Full Quote to a Policy,** follow the instructions for Direct Billing.

1. On the Payment Plan tab, if required, select a **Recurring Payment Method** from the drop-down menu. You can choose Check, Credit Card, or EFT.
2. Click **Make Down Payment**.

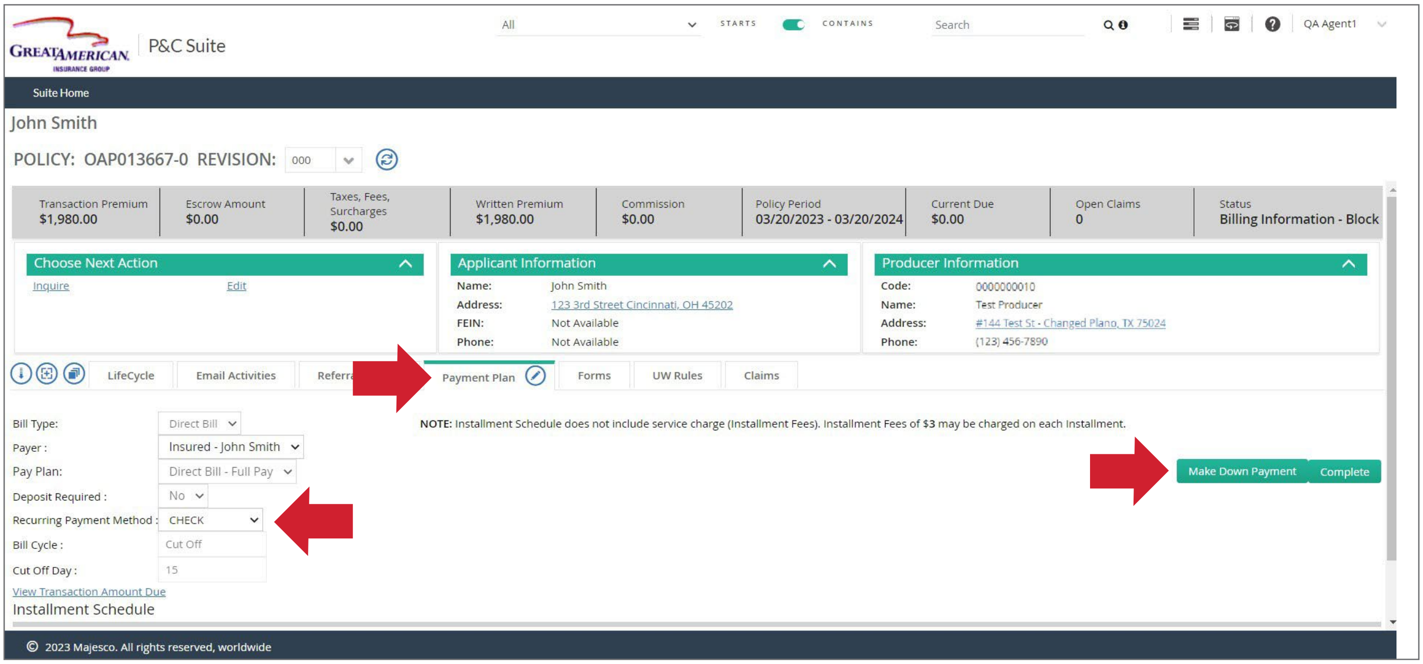

Figure 1. Payment Plan tab on the dashboard for Direct Bill.

3. In the Payment Details pop-up window, click **Make Down Payment** again.

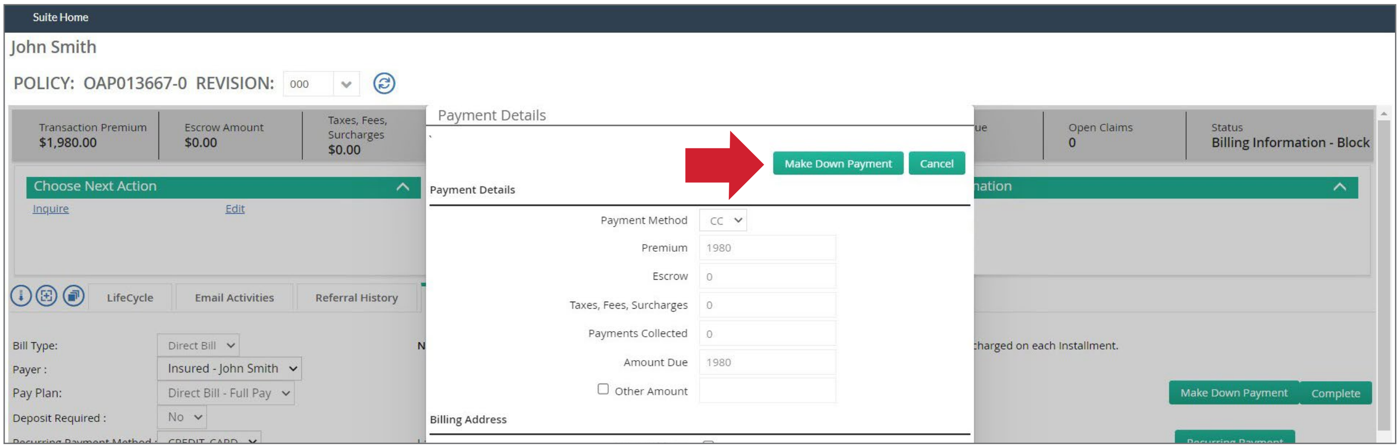

Figure 2. Payment Details pop-up window.

4. In the **MAKE A PAYMENT** pop-up window, click **REVIEW**.

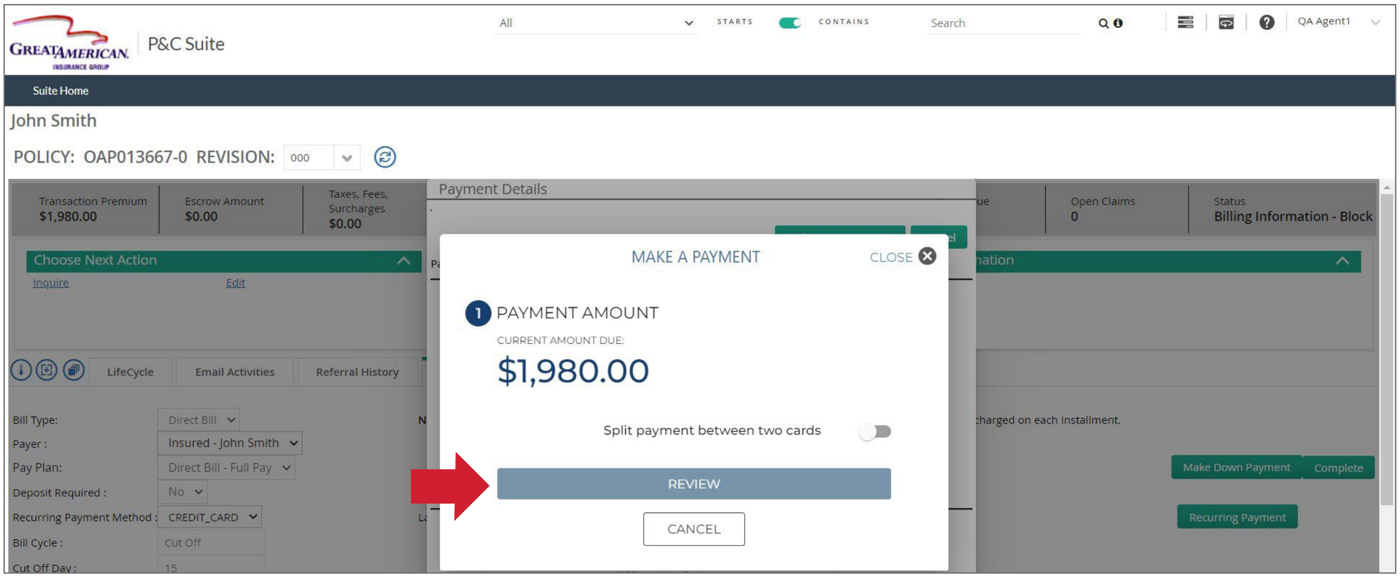

Figure 3. Make a payment window.

5. Enter the information for the Credit Card, Check, or EFT as required. In this example, we are entering credit card information.

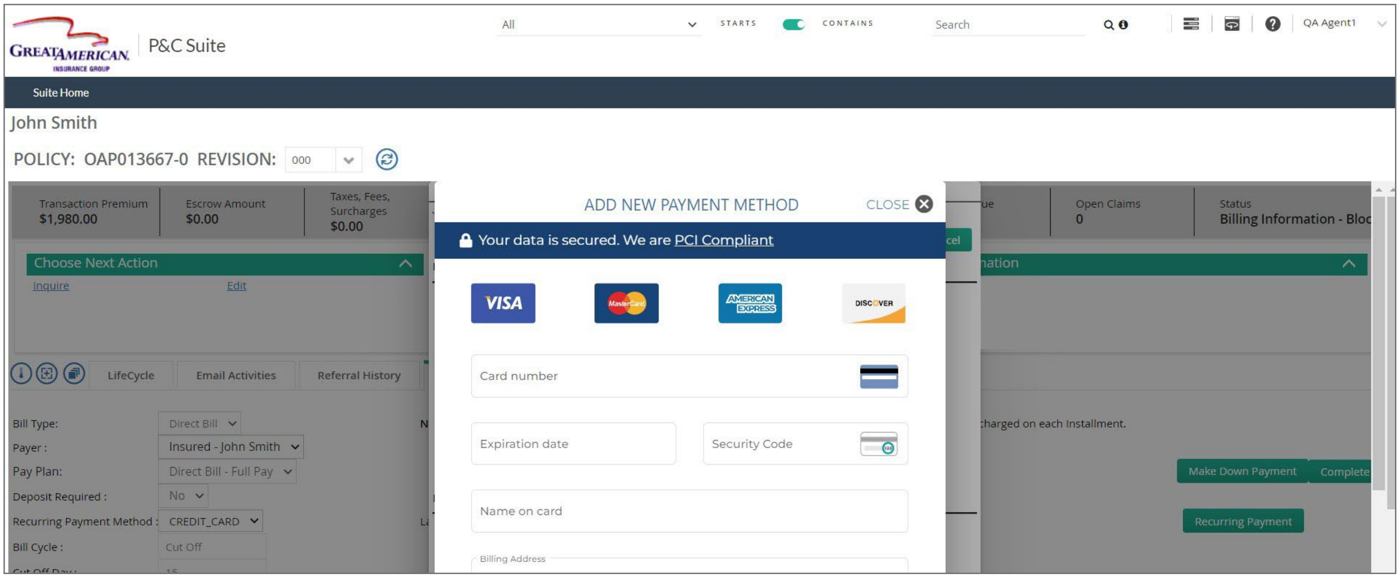

Figure 4. Add New Payment Method window.

6. When finished, click **REVIEW**.

7. On the next screen, click **PAY**. If the payment is accepted, you will receive a confirmation screen with the policy number, payment amount, and transaction number. You also have the ability to send a receipt via email.

8. Once the payment box closes, click **COMPLETE**.

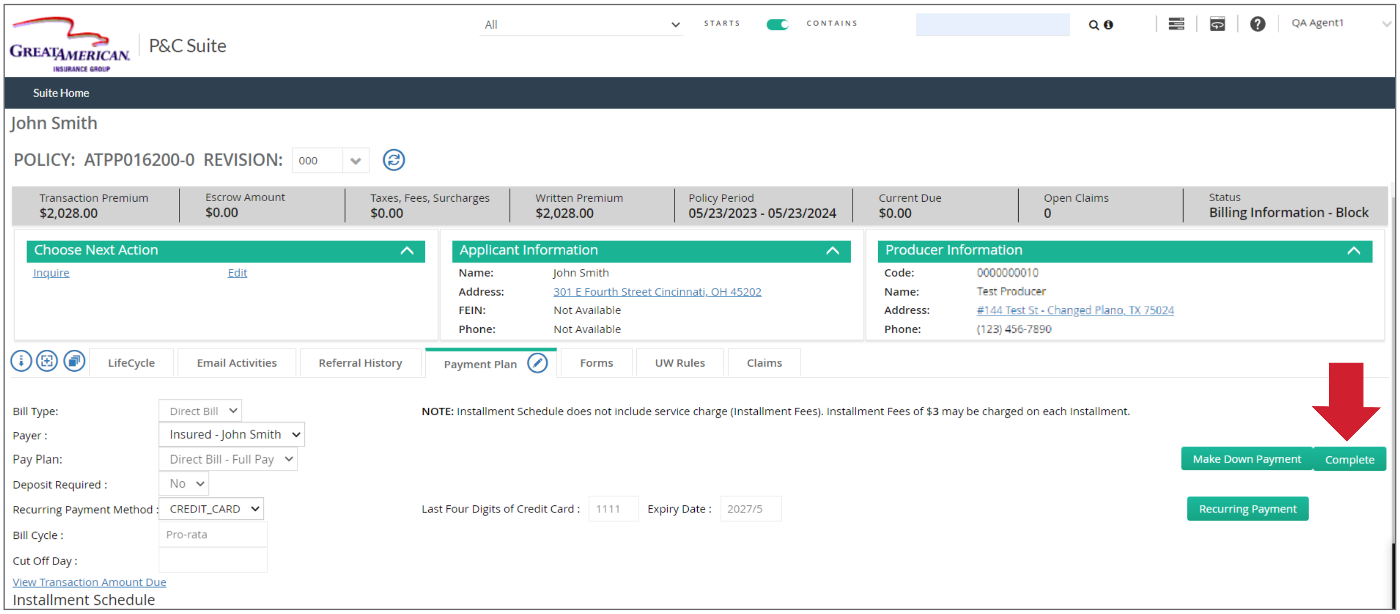

Figure 5. Completing Down Payment.

9. Once the Down Payment has been made, click **BOOK**.

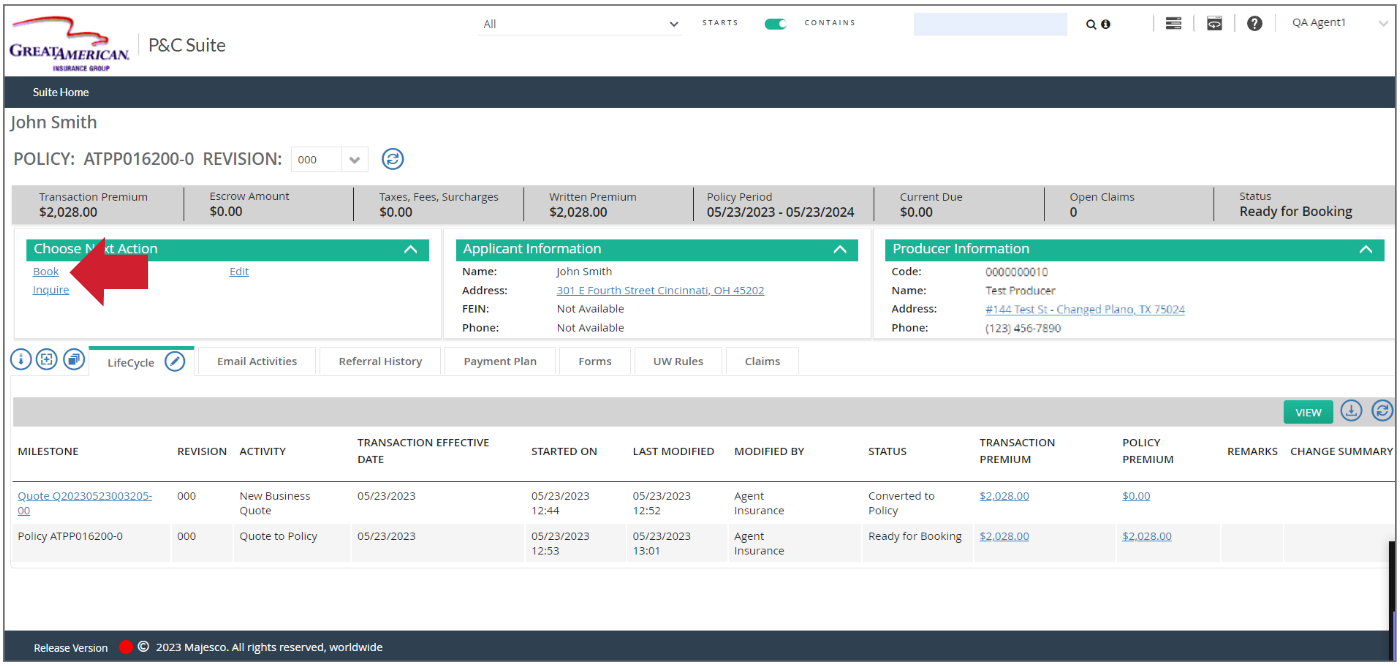

Figure 6. Book Policy.

10. If monthly payments are required, set up a recurring payment method by clicking **RECURRING PAYMENT**.

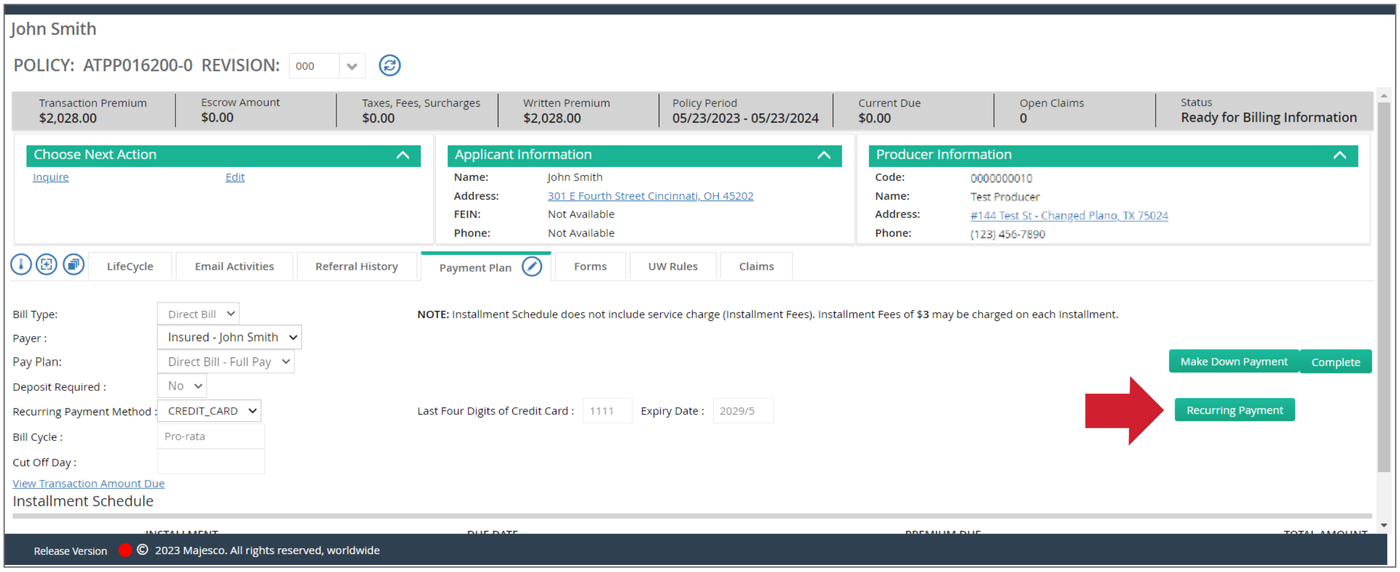

Figure 7. Recurring Payment.

11. Review the billing details and click **CREATE PAYMENT PROFILE**.

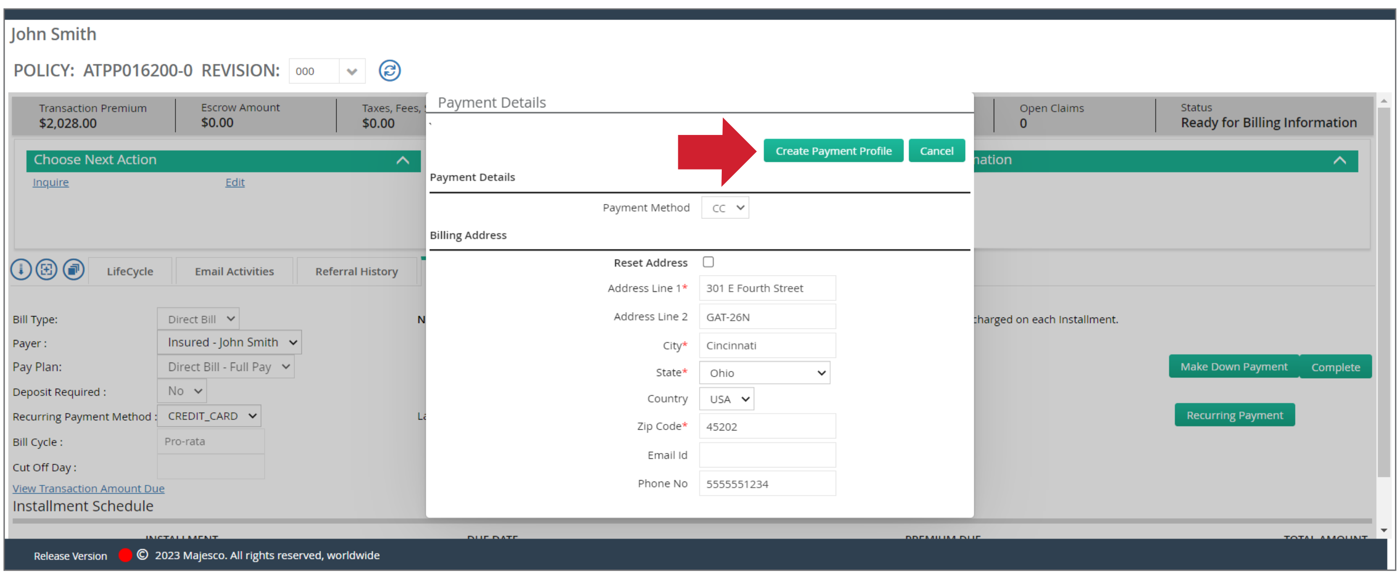

Figure 8. Create Payment Profile pop-up window.

12.Review payment details and click **SUBMIT**.

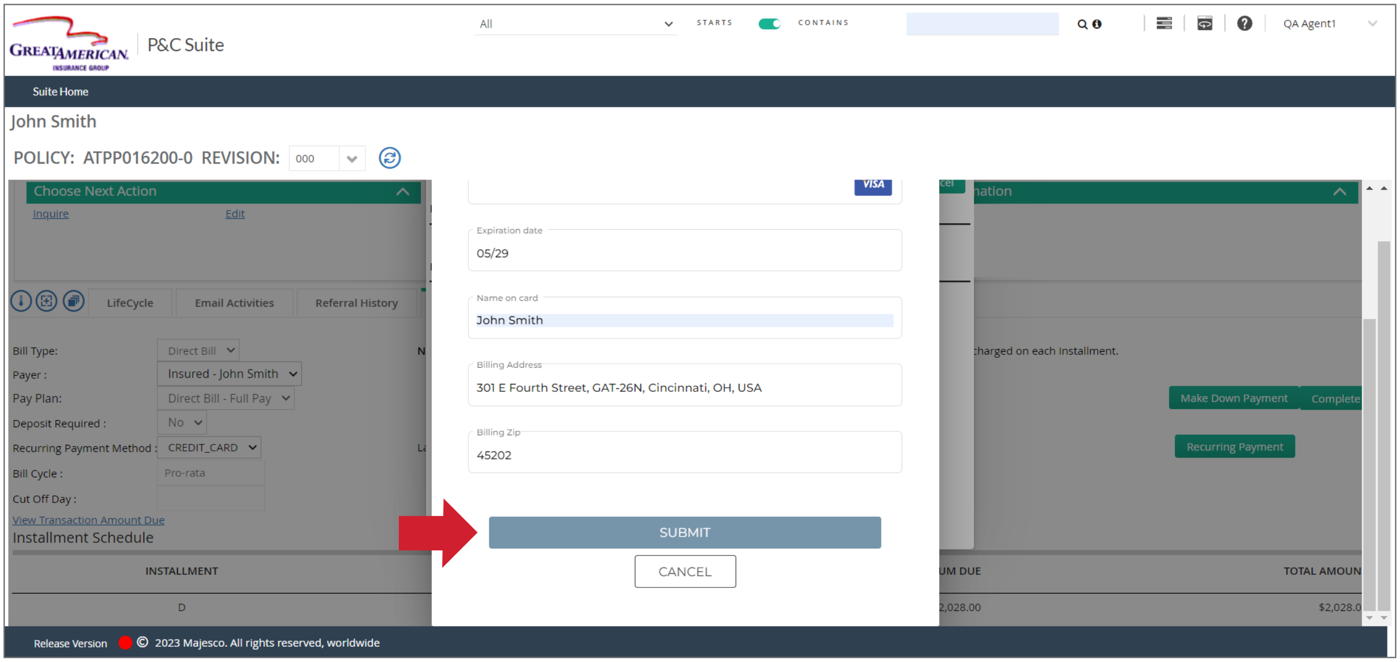

Figure 9. Review Payment Details pop-up window.

13.Click **SAVE PAYMENT METHOD**.

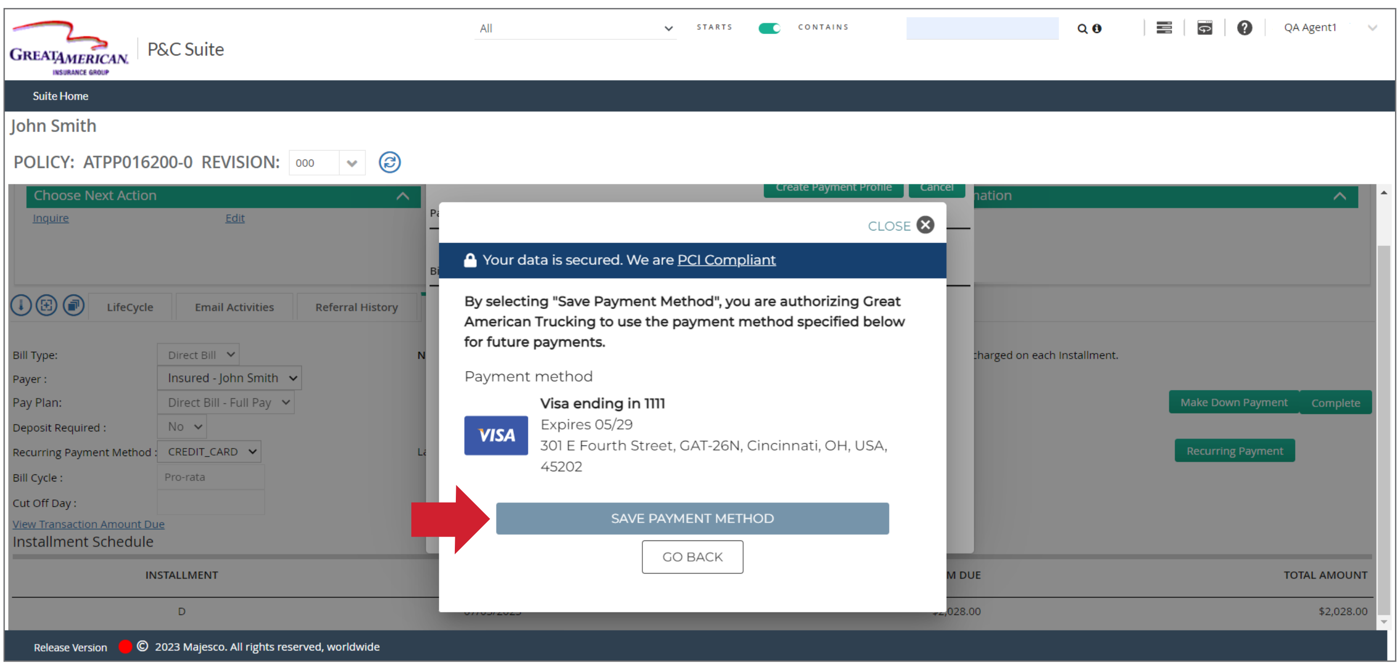

Figure 10. Save Payment Details pop-up window.

14.Once the recurring payment box closes, click **COMPLETE**.

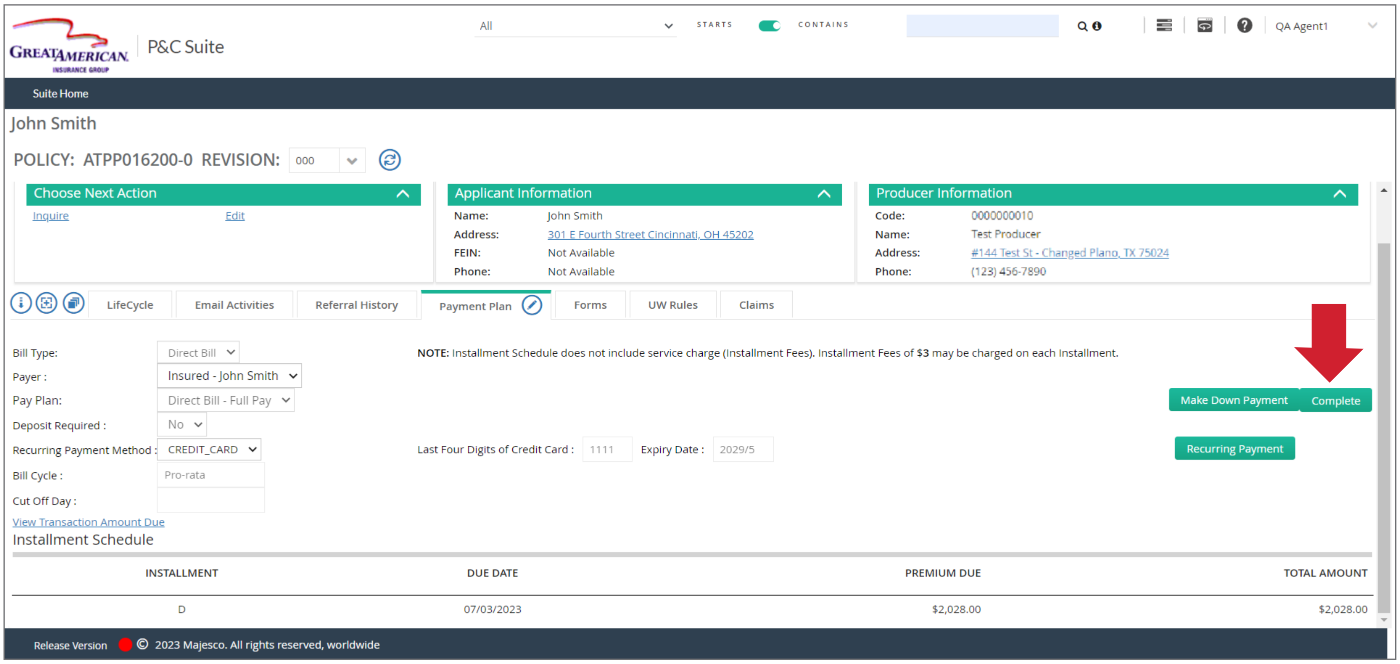

Figure 11. Completing Recurring Payment.

15.Once the recurring payment has been completed, click **BOOK**.

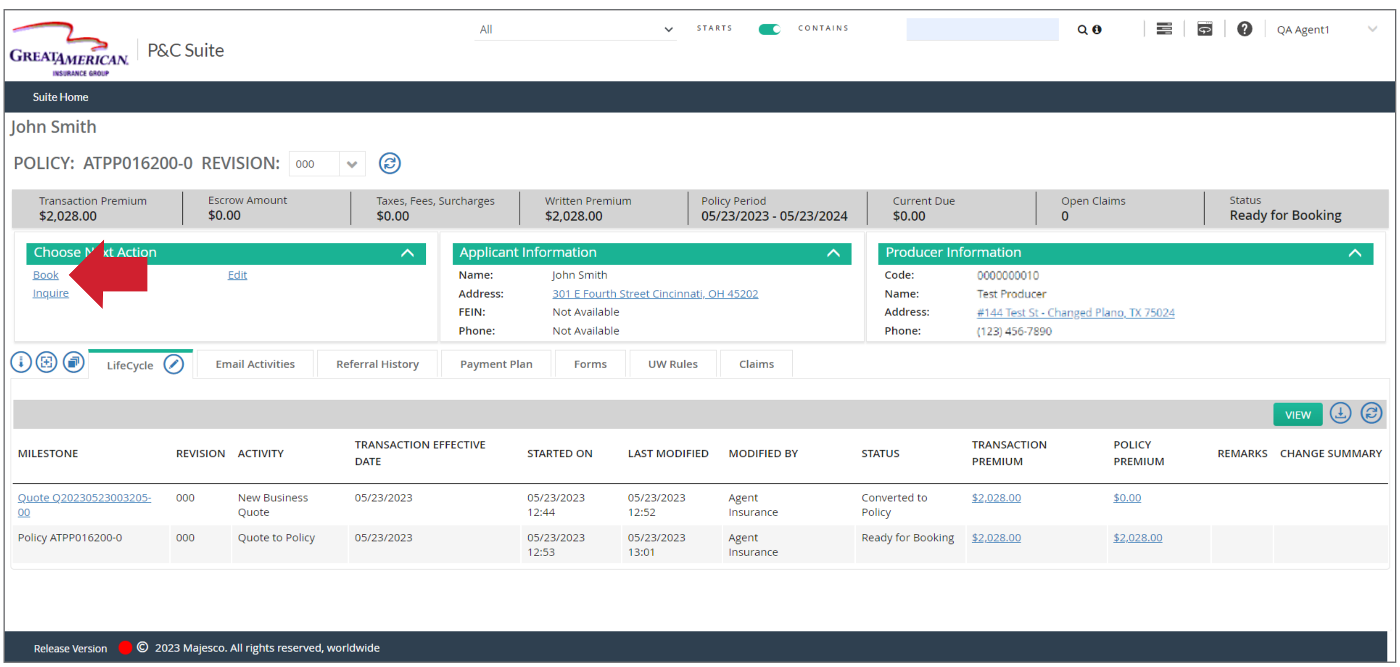

Figure 12. Booking Policy after setting up the Recurring Payment.