



# Entering A New Application into AgentTree

## Entering a New Application

From your homepage in AgentTree, click on **New** under the **Policies** heading to enter a new application.

The screenshot shows the AgentTree web application interface. At the top, there is a header with the company logo and the text "Open Open". Below the header, there is a navigation menu on the left with the following items: Administration, Claims, Reports, Agent Info, Current Policies, and Training Help. The main content area is divided into three sections: "Policies", "Static Reports", and "Quotes". Under "Policies", there are "Search" and "New" buttons. A large black arrow points to the "New" button. Under "Static Reports", there is a link to "Get Acrobat Reader to view these reports" and a list of report types: APPLICATION FORMS, RATE TABLE FORMS, SC M/H AFFIDAVIT, BANK AUTHORIZATION, OUT OF STATE AFFID..., MS - STATE PAGES, and COUNTRYWIDE UNDERW... Under "Quotes", there are "Search" and "New" buttons. At the bottom, there is a notification table with the following data:

DATE	SENDER	TOPIC	MESSAGE	STATUS
06-23-2020 09:54	LOUANNE KOCHOA -	Cancelled	Policy has been cancelled effective	Open



# Entering A New Application into AgenTree

## Policy Changes

On the left hand side you will notice several tabs in grey. Below is the Policy Changes Screen.

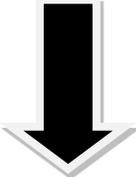
The information on this screen will be prefilled.

- The effective date will default to the current date.
- The coverage term will default to 1 month
  - You may change the coverage term to quarterly, semi-annually or annually.
- The expiration date will be one month from the effective date.
  - The expiration date will adjust to reflect the coverage term.

Click on **Save & Continue**. You will automatically be taken to the General tab.

View All Policies

<b>Policy Changes</b>	<b>Insured Name:</b> Not Available
General	<b>Policy Number:</b> Not Assigned <b>Status:</b> NEW <b>Premium:</b> n/a
Insured	Effective Date <input type="text" value="07-14-2020"/>
Property Address	Coverage Term <input type="text" value="1 month"/>
Coverage	Expiration Date 08-14-2020
Underwriting	



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# Entering A New Application into AgenTree

## General

From the General tab you will need to select the **Billing Type** and **Payment Plan**.

There is only one option for Billing Type. Select **Insured Bill** from the drop down.

Select the appropriate Payment Plan from the drop box. The insured may select:

- Monthly
- Quarterly
- Semi-Annual
- Annual

The payment plan should correspond with the **Coverage Term** on the previous screen.

If ACH/EFT will be the mode of payment for the initial premium or any premium thereafter you should still select monthly from the drop down for **Payment Plan**. Submit a completed ACH Bank Draft Authorization form with the completed application and the Home Office will set up the ACH.

Home | View All Policies

**Fields marked with red background are mandatory. Hold cursor over the field for explanation.** Show Details

Policy Changes	<b>Insured Name:</b> Not Available
<b>General</b>	<b>Policy Number:</b> Not Assigned <span style="float: right;"><b>Status:</b> NEW <b>Premium:</b> n/a</span>
Insured	Renewal Of Policy No
Property Address	U/W Status Unknown <span style="float: right;">U/W Suspense Date 01-01-1900</span>
Coverage	Total Premium \$0.00 -
Underwriting	<b>Billing Type</b> <input type="text" value="Insured Bill"/> <span style="float: right;"><b>Payment Plan</b> <input type="text" value="Monthly"/></span>
	Agents must remit bank authorization forms to Home Office for bank draft changes or Monthly-EFT options
	Additional Information <input type="text"/>

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After you have selected the Billing Type and Payment Plan, click on **Save & Continue**.

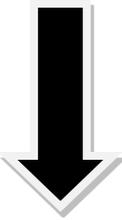


# Entering A New Application into AgenTree

Home | View All Policies

**Fields marked with red background are mandatory. Hold cursor over the field for explanation.** [Show Details](#)

Policy Changes	<b>Insured Name:</b> Not Available <b>Policy Number:</b> Not Assigned <b>Status:</b> NEW <b>Premium:</b> n/a
<b>General</b>	
Insured	Renewal Of Policy No U/W Status Unknown U/W Suspense Date 01-01-1900
Property Address	Total Premium \$0.00 -
Coverage	Billing Type <input type="text" value="Insured Bill"/> Payment Plan <input type="text" value="Monthly"/>
Underwriting	Agents must remit bank authorization forms to Home Office for bank draft changes or Monthly-EFT options Additional Information <input type="text"/>



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# Entering A New Application into AgenTree

## Insured

The following screen is the Insured screen. As you move through the fields use the Tab key.

- Enter a four (4) digit account number (optional)
  - Account numbers can be used to group policies that belong to the same family, that are in the same area or for any other reason you would need to group them. This can be any four digits; they are used for your reference only but are a mandatory field.
- Enter the first name of the insured.
  - Agentree will check the system for policies that match the first name of the insured. A list may or may not populate showing the matches. (see screen below)
- Enter the middle name, middle initial or leave blank.
- Enter the last name of the insured.
- Enter the Telephone number of the insured
- Enter the Email Address of the insured (if available, if the insured does not have an email address, possibly a family members email address they can provide to receive notifications from the company regarding their policy should there be any)

**\*Note: The system will check for other policies that match the information that you enter after each field. Be sure to Tab, and give the system a moment to run the check.**

🏠 | View All Policies

**No Current Clients can be found for the specified criteria**

Policy Changes	<b>Insured Name:</b> Not Available <b>Policy Number:</b> Not Assigned <b>Status:</b> NEW <b>Premium:</b> n/a			
General				
<b>Insured</b>	Client Id 0			
Property Address	District I522	Agency I1217	Account	<input type="text"/>
Coverage	First Name John	Middle	Last Doe	<input type="text"/>
Underwriting	Telephone (123) 456-1234	Alt Phone	Fax	<input type="text"/>
	Email	Birth Year 1900	SSN	<input type="text"/>

**ADDITIONAL INSUREDS**



## Entering A New Application into AgenTree

Once you have entered the information for the mandatory fields if there are no policies either in force or lapsed for the current insured then you will see the message **“No Current Clients can be found for the specified criteria.”**

**Click Save & Continue**

Home | View All Policies

**No Current Clients can be found for the specified criteria**

**Insured Name:** Not Available  
**Policy Number:** Not Assigned  
**Status:** NEW **Premium:** n/a

Insured					
Client Id	0				
District	I522	Agency	I1217	Account	<input type="text"/>
First Name	John	Middle	<input type="text"/>	Last	Doe
Telephone	(123) 456-1234	Alt Phone	<input type="text"/>	Fax	<input type="text"/>
Email	<input type="text"/>	Birth Year	1900	SSN	<input type="text"/>

**ADDITIONAL INSUREDS**

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### Property Address

At the Property Address screen you will enter the physical and billing address of the insured.

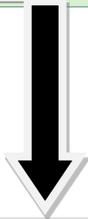
- Enter the address.
- Select the appropriate state. You will only be able to select the state for those you are licensed and appointed in.
- Enter the zip code.
  - If there is more than city/county name for the specified zip code, a list will populate
  - The specified zip code might have multiple city/county combinations that are acceptable by the USPS. Select the appropriate combination from the list by clicking on the community name. The information for City and County will be filled into the system.
  - If the property is unprotected or inside the city limits select the appropriate check box.
- If an alternate billing address is provided, you can select the check box for Alternate Billing and enter the address as shown below then click on **Save & Continue**. If an alternate billing address is not given, click on **Save & Continue**.



## Entering A New Application into AgenTree

View All Policies

Policy Changes	<b>Insured Name:</b> John Doe			
General	<b>Policy Number:</b> Not Assigned		<b>Status:</b> NEW <b>Premium:</b> n/a	
Insured	Address: 123 Rainbow Drive		Territory: 040	
<b>Property Address</b>	State: Georgia	Zip Code: 30004	Place Code: 03	
	City: ALPHARETTA	County: FULTON	PPC Low: 03	
Coverage	Unprotected? <input type="checkbox"/>	Inside City Limit? <input type="checkbox"/>	PPC High: 03	
Underwriting	Fire / Parish			
	Alternate Billing? <input type="checkbox"/>			
	Billing Name: John Doe			
	Address: 123 Rainbow Drive			
	City:	State: GA	Zip Code: 30004	



[Save & Continue](#) [Cancel Policy](#)

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### Coverage

The next screen is the Coverage screen.

- Year Built. This is especially important if the risk is a mobile home and will be specifically asked on the mobile home affidavit but not necessarily on the application itself.
- Construction Type
  - Frame
  - Masonry
- Type of Residence
  - Single family
  - Multi Family
  - Mobile Home
  - Mobile Home in a Park
- Number of Rooms (excluding bathrooms)
- Entrances
  - Front and/or Rear for single family homes.
  - Left or Right for multi family homes that share a common entrance. (Is the apartment on the left or right hand side of the hall?)
  - Level Floor: What floor is the apartment on?
  - In Basement: Is it an in basement apartment?



## Entering A New Application into AgenTree

- If there is any other insurance on Household Contents mark the check box and enter the name of the other insurance company in the box to the right.
- Household Contents is automatically selected by default. Select the amount of insurance from the drop down.
- If the policy is going to have Emergency Expense Benefit or Jewelry, Firearms and Furs added as an endorsement to the policy select the appropriate check box.
- If adding burglary, select the check box and the amount from the drop down.

Once you have completed all mandatory fields and selected the coverage details, click on **Save & Continue**.

View All Policies

**Another Policy is currently in effect at the address.**

Policy Changes	<b>Insured Name:</b> John Doe																																																																						
General	<b>Policy Number:</b> Not Assigned		<b>Status:</b> NEW <b>Premium:</b> n/a																																																																				
Insured	Year Built	1980	Construction Type	FRAME																																																																			
Property Address	Type of Residence	Single Family	Residence Code																																																																				
	# Rooms	5	Entrances <input checked="" type="checkbox"/> Front <input type="checkbox"/> Rear <input type="checkbox"/> Right <input type="checkbox"/> Left																																																																				
Coverage	Assignment	<input type="checkbox"/>	Level Floor#	0	In Basement? <input type="checkbox"/>																																																																		
	Other Insurance	<input type="checkbox"/>	Other Company																																																																				
Underwriting	<table border="1"> <thead> <tr> <th>Active?</th> <th>Description</th> <th>Amount</th> <th>Inception Date</th> <th>Rate</th> <th>Premium</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td>Household Contents</td> <td>15,000.00</td> <td>n/a</td> <td>0.0000</td> <td>0.00</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>Emergency Expense Benefit</td> <td></td> <td>n/a</td> <td>0.0000</td> <td>0.00</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>Jewelry, Firearms and Furs</td> <td></td> <td>n/a</td> <td>0.0000</td> <td>0.00</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>Burglary</td> <td>3,000.00</td> <td>n/a</td> <td>0.0000</td> <td>0.00</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>Refrigerated Food Spoilage</td> <td></td> <td>n/a</td> <td>0.0000</td> <td>0.00</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Liability</td> <td>100,000</td> <td>n/a</td> <td>0.0000</td> <td>0.00</td> </tr> <tr> <td><input type="checkbox"/></td> <td>City Tax</td> <td></td> <td></td> <td>0.0000</td> <td>0.00</td> </tr> <tr> <td></td> <td>County Tax</td> <td></td> <td></td> <td>0.0000</td> <td>0.00</td> </tr> <tr> <td></td> <td>State Tax</td> <td></td> <td></td> <td>0.0000</td> <td>0.00</td> </tr> <tr> <td colspan="5" style="text-align: right;">Total</td> <td>0.00</td> </tr> </tbody> </table>					Active?	Description	Amount	Inception Date	Rate	Premium	<input checked="" type="checkbox"/>	Household Contents	15,000.00	n/a	0.0000	0.00	<input checked="" type="checkbox"/>	Emergency Expense Benefit		n/a	0.0000	0.00	<input checked="" type="checkbox"/>	Jewelry, Firearms and Furs		n/a	0.0000	0.00	<input checked="" type="checkbox"/>	Burglary	3,000.00	n/a	0.0000	0.00	<input checked="" type="checkbox"/>	Refrigerated Food Spoilage		n/a	0.0000	0.00	<input type="checkbox"/>	Liability	100,000	n/a	0.0000	0.00	<input type="checkbox"/>	City Tax			0.0000	0.00		County Tax			0.0000	0.00		State Tax			0.0000	0.00	Total					0.00
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Total					0.00																																																																		

**Save & Continue**
**Cancel Policy**

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### Underwriting

- This is the underwriting screen. Please answer each question as “Yes” or “No” as appropriate.
- Click on **Save & Continue**.

**Note: Not all states have underwriting questions on the application.**



## Entering A New Application into AgenTree

View All Policies

Policy Changes	<b>Insured Name:</b> John Doe
General	<b>Policy Number:</b> Not Assigned <b>Status:</b> NEW <b>Premium:</b> n/a
Insured	Has Underwriting Approval? <input type="checkbox"/>
Property Address	Have there been any losses in the last 3 (three) years? No
	Is the Personal Property owned by someone other than the Applicant(s)? No
Coverage	Does the Applicant reside at an address other than the Insured Address? No
	Is Business Conducted at Insured Address? No
<b>Underwriting</b>	Is this a Seasonal or Part-Time Residence? No
	Is the property Vacant or unoccupied? No
<b>AGENT OBSERVATIONS</b>	
	Any evidence of Bad Wiring? No
	Are there any Lights Flickering? No
	Is there Excessive use of Extension Cords? No
	Are Extension Cords running under Rugs Or Carpet? No
	Is the property without Electricity, Gas or Water? No
	Is there Excessive rubbish, oil, kerosene or gas cans on the property? No
	Does the Insured Address contain a Wood Or Coal Burning Stove? No
	Are there any Non U.L. Approved space or kerosene heaters? No
	<b>Save &amp; Continue</b> <b>Cancel Policy</b>

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After clicking on **Save & Continue**, click on **Process Changes** on the same screen. You should see the message **"The policy was submitted and needs Underwriting Approval"** in the upper left hand corner. You will also see that the insured name, policy number and premium have all been filled in and that the status shows as **Suspended**.



## Entering A New Application into AgenTree

View All Policies

**The Policy was submitted and needs underwriting approval**

Summary	<b>Insured Name:</b> John Doe	<b>Status:</b> Suspended	<b>Premium:</b> \$27.60
Policy Changes	<b>Policy Number:</b> GAP_900080912-20-07		

This policy requires Underwriting approval because  
**ANOTHER POLICY IS CURRENTLY IN EFFECT AT THE ADDRESS.**

General	Has Underwriting Approval?	<input type="checkbox"/>
Insured	Have there been any losses in the last 3 (three) years?	No
Property Address	Is the Personal Property owned by someone other than the Applicant(s)?	No
Coverage	Does the Applicant reside at an address other than the Insured Address?	No
	Is Business Conducted at Insured Address?	No
	Is this a Seasonal or Part-Time Residence?	No
	Is the property Vacant or unoccupied?	No
	<b>AGENT OBSERVATIONS</b>	
	Any evidence of Bad Wiring?	No
	Are there any Lights Flickering?	No
	Is there Excessive use of Extension Cords?	No
	Are Extension Cords running under Rugs Or Carpet?	No
	Is the property without Electricity, Gas or Water	No
	Is there Excessive rubbish, oil, kerosene or gas cans on the property?	No

Save & Continue   Process Changes   Cancel Policy

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### What to Do Next

- You must submit the original application and the initial premium payment by mail to the address below to be issued.

Independent Mutual Fire Insurance Company  
4 North Park Drive  
Suite 402  
Hunt Valley, MD 21030

- If the initial premium will be paid though ACH/EFT OR the policy will be on ACH/EFT for each subsequent payment, be sure that you have the Named Insured sign the ACH Bank Draft Authorization form.
  - If the initial premium payment is being paid through ACH/EFT, we must have the completed paperwork in our office no later than THREE (3) business days PRIOR to the draft date.
  - You can email or fax this application along with the ACH Bank Draft Authorization form to the home office:

Toll Free Fax: 877.509.5980

Email: [UW@IMFCO.NET](mailto:UW@IMFCO.NET)

- Once the policy is issued a policy and declaration page will automatically be generated and mailed directly to the insured.
- Once the policy shows issued in AgenTree, you will have access to print the Full Policy and Dec Page.