

BRISTOL WEST AUTO POLICY SUMMARY & ENDORSEMENTS

This job aid will walk you through the Endorsement process and how to make payments on a Bristol West auto policy in IAProducers.com.

Search for a Policy

To begin, log in to www.IAProducers.com

- 1 Select [Quoting]
- 2 Select [Endorsements]
- 3 Search by [Last Name or Policy #] or option to [Void Endorsement].



Customer Search | New Customer | Upload Log | Void Endorsement

Search by Name
 Insured Last Name: [Advance Search](#)
 Search in: Existing & Uploaded Policies

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New Business | Endorsements

Policy Search by Name or Policy #
 Void Endorsement

WELCOME!

- [Non-Payment Cancel Alerts](#)
- [! Go Paperless Alerts](#)
- [Enroll in Text Alerts](#)
- [Policy Activity Reports](#)
- [Make a Payment](#)

News

- Important: PL Rater Credential Update Information [More..](#)
- Important: PL Rater Credential Update Information [More..](#)
- IA Auto Brand Transition to Bristol West [More..](#)
- Foremost IA Auto Begins Transition to Bristol West Brand [More..](#)
- Foremost Auto Rate Review and Rideshare Update (FL) [More..](#)



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Customer Search | New Customer | Upload Log | Void Endorsement

Search by Name
 Insured Last Name: [Advance Search](#)
 Search in: Existing & Uploaded Policies

Search Results

Policy Type	Policy Status	Policy Number	Amount Due	Options
Auto - Quote	Active			Select
Auto - Quote	Active			Select
Auto - Quote	Active			Select
Auto - Quote	Active			Select
Auto - Quote	Active			Select
Auto - Quote	Active			Select
Auto - Quote	Active			Select
Auto - Quote	Active			Select
Auto - Quote	Active			Select
Auto - Quote	Active			Select
Auto - Verified Policy	Active		\$0.00	Select

* Fees may not be included in the Amount Due.

- 1 [Policy Type] will show Quotes and Verified Policy
- 2 [Policy Status] will show Active, Expired, and Cancelled policies. Make sure you are looking for the Active policy!
- 3 [Options] will show the different options that can be done to the policy. Just click on one of them to continue.

View/Print Documents

- 1 If you're looking to view or print documents, we have several options available for you.
 - [View/Print Docs] will provide you access with everything.
 - [Declarations Page] provides a quick way to print or view it.
 - Need an id card – then here is your place to find it! Just click on the [Proof of Ins/ID Card].

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Customer Search New Customer Upload Log Void Endorsement

Search by Name
Insured Last Name: Advance Search
Search in: Existing & Uploaded Policies Search

Search Results

Policy Type	Policy Status	Policy Number	Amount Due	Options
Auto - Quote	Active			Select
Auto - Quote	Active			Select
Auto - Quote	Active			Select
Auto - Quote	Active			Select
Auto - Quote	Active			Select
Auto - Quote	Active			Select
Auto - Quote	Active			Select
Auto - Quote	Active			Select
Auto - Quote	Active			Select
Auto - Verified Policy	Active		\$0.00*	Select

* Fees may not be included in the Amount Due.

Submit a Document

- 2 Select [Submit a Document] from the options.
- 3 Select the [Document Type] that needs to be submitted.

- 3 Select Document Type

Important, please select the document type which best fits the document you are submitting to ensure timely processing.

Please Select

 - Please Select
 - Proof of Prior Auto or Home Insurance
 - Change/Endorsement Forms - Change coverage/add vehicle/etc.
 - Cancellation Forms
 - Enrollment/Changes to Direct Debit - Electronic Funds Transfer
 - Termination of Direct Debit - Electronic Funds Transfer
 - New Business Flat Cancel Request
 - Other

- 4 Choose the file location and then click on [Upload].

- 4 Select Document Type

Important, please select the document type which best fits the document you are submitting to ensure timely processing.

Proof of Prior Auto or Home Insurance

Choose File No file chosen

Upload

View or Report Claim

1 [Claims List] will show all claims for the Insured. You can view:

- Date reported
- Claim Number
- Loss Date
- Claim Status

2 If you're looking for more details just click on the [Claim Number] hyperlink.

1 Status

2 Payments

3 WHEN AND WHAT

4 VEHICLES INVOLVED

The [Overview] provides full details of the claim.

- 1 View the status of the claim.
- 2 See payment amounts.
- 3 When the claim occurred and details of what happened.
- 4 Which vehicles were involved.
- 5 Claims representative for the loss.

5 CLAIM TEAM

LEAD CLAIM REPRESENTATIVE

NOTES

Created	Author	Comment
06/28/2018	RICHARD DDO	x
06/28/2018	RICHARD DDO	x
06/28/2018	RICHARD DDO	Reviewed PD subm - Progressive PD in line \$3,807.86 Rental in line 11 dancw/ 45.4 labor hours

Make a Payment

- [Make a Payment] gives you the ability to choose to make payment by Credit/Debit Card, Checking/Savings or Producer Sweep.

Policy Summary

Additional options are available by clicking on any of the links across the top.

- Policy Summary
 - Policy Holder basic information
 - Text Alert Status
 - Go Paperless status
- Option to Update/Terminate EFT
- Option to print in a friendly view.
- View current Billing Summary. See how much is due and make a payment by simply clicking on the link.
- View summary of Drivers, Discounts, Vehicles and Coverages.

Policy Summary (Click to Collapse ...)

Policy Holder: [Redacted] Address: [Redacted] 9 (change) Phone #: [Redacted] Email: [Redacted] Effective Date: [Redacted] Text Alert Status: Not Enrolled Go Paperless Status: Enrolled - Authentication Pending

Producer: [Redacted] Policy #: [Redacted] Status: Active EFT Status: Active Expiration Date: [Redacted] Update/Terminate EFT View Producer Messages

[Printer friendly view](#)

Billing Summary (Click to Collapse ...)

Pay Plan	EFT	Last Payment	Received	Balance	Amount Due	Reinstate Amt.	Due Date	Rewrite Amt.
6 Pay	<input checked="" type="checkbox"/> Credit Card	(\$147.16)		\$576.68	\$0.00			\$0.00

[Make a payment](#)

Driver(s) Summary (Click to Collapse ...)

[Endorse Drivers](#)

Listed Driver(s)	Driver Status	Gender	Date of Birth	License #	State	Marital Status	SR22
[Redacted]	Rated	Female	03/18/1976	[Redacted]	FL	Single	No

Discount(s) Summary and Selections (Click to Collapse ...)

Policy Discount	Driver Discount	Vehicle Discount
Advance Purchase, Safe Driver	None	2017 TOYT RAV4 LE - Anti-Lock Brake - Airbag

Go Paperless Text Alert Preferences

Vehicle(s) Summary (Click to Collapse ...)

[Endorse Vehicles](#)

Year, Make & Model	VIN #	Use	Garage Zip	Lienholder/Additional Interest
2017 TOYT RAV4 LE	[Redacted]	Pleasure/Commute	33309	

Premium/Coverage Summary (Click to Collapse ...)

[Endorse Coverages](#)

Coverage	Limit/Deductible - Premium
Bodily Injury	None 2017 TOYT
Property Damage	10,000 \$162.00
Uninsured Motorist	None

Endorse Policy



Need to make a change to a policy? Just click on the [Endorse Policy] option.

- 1 Effective date will default to current date. Modify as needed and then click on [Endorse Policy].

Policy Information

Insured Name: [Redacted]
Address: [Redacted]

Policy Number: [Redacted]
Policy Status: Active
Policy Effective Date: 07/29/
Policy Expiration Date: 01/29/

Endorsement Effective Date: 09/12/ 1

[Endorse Policy](#)

*You can also quote changes to the policy through the "Endorse Policy" option. Just be sure to choose "Exit - Cancel Endorsement" when finished quoting and none of the changes will be saved. Only choose "Submit Endorsement" when ready to apply the changes to the policy.

**You will be unable to process an endorsement or quote changes to the policy if one of the following restrictions apply:
- An endorsement is already in progress
- The endorsement effective date is during a lapse period, or
- The endorsement effective date is prior to a previous endorsement effective date.

Click on any of the tabs across the top to make changes to that specific criteria.

- Driver Tab – Add and delete drivers on the policy.
- Violations: If you're adding a new driver you have the ability to add their violations here.
- Vehicle/Coverages: Add or delete vehicles and vehicle coverages like comp/coll.
- Lienholder/Additional Interest: Is the vehicle financed? Don't forget to add the finance company here.

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Forms | Program Guide | Exit - Cancel Endorsement

[Policy](#) | [Driver](#) | [Violations](#) | [Vehicle/Coverages](#) | [Lienholder/Additional Interest](#) | [Rate Policy](#)

Policy Summary (Click to Collapse ...)

Policy Holder: [Redacted] Address: [Redacted] Phone #: [Redacted] Email: [Redacted] Effective Date: [Redacted] Text Alert Status: Not Enrolled
Go Paperless Status: Enrolled - Authentication Pending

Producer: [Redacted] Policy #: [Redacted] Status: Active EFT Status: Active Expiration Date: [Redacted]

Endorsement Effective Date: [Redacted] Product: [Redacted] Term: 6 Months Pay Plan: [Redacted]

[View Producer Messages](#)

Policyholder Information (Click to Collapse ...)

Home Phone: [Redacted] Email Address: [Redacted]

Address: [Redacted] City: [Redacted] State: FL Zip/Postal Code: 33309-4939

Policy Level Coverages (Click to Collapse ...)

Bodily Injury	None
Property Damage	10
Uninsured Motorist	None
Medical	None
PIP Coverage	Basic Wage Loss Excluded
PIP Deductible	1000
PIP Insured	NIRR

[Rate Policy](#) | [Exit - Cancel Endorsement](#)

- 2 Ability to change home phone, emails or address in the Policyholder Information.
- 3 Need to make changes to coverages? Just select the new coverages in the [Policy Level Coverages] section.
- 4 When you are done making changes you can click on [Rate Policy] this will provide the charge for this endorsement and option to either continue or cancel the endorsement.

Endorse – Vehicle/Coverages

1 You can easily add, delete or substitute a vehicle on the [Vehicle/Coverages] tab.

2 The [Add Vehicle] button will let you add a new vehicle.

3 To substitute a vehicle, click on the [Vehicle Lookup] for the vehicle you wish to delete.

4 [Vehicle Lookup] screen will pop up where you are able to type the new VIN over the current one.

5 Make any necessary changes to the vehicle coverages.

6 When you are done making changes you can click on [Rate Policy] this will provide the charge for this endorsement and option to either continue or cancel the endorsement.

7 Click on [Exit – Cancel Endorsement] to cancel out of the quoted endorsement and discard any changes made.

[Rate Policy](#) [Exit - Cancel Endorsement](#)

Endorse – Rate Policy

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Policy Driver Violations Vehicle/Coverages Lienholder/Additional Interest **Rate Policy**

Policy Summary (Click to Expand ...)

1 You can modify [Policy Level Coverages] you must click on [Recalculate] to get revised policy premium

2 The [Rate Policy] tab will display the revised premium (if any) for the endorsement.

3 If there is a change in premium than you can see [Future Payments]

4 Expand the Policy, Vehicle and Driver Level sections to see applicable changes.

5 Ability to view: Charge for this endorsement (default view), Total charged for the policy term, Full-Term Premium or Full-Term premium Difference.

6 Click on [Continue Endorsement] if you wish to continue and submit it.

7 Click on [Exit – Cancel Endorsement] to cancel out of the quoted endorsement and discard any changes made.

Recalculate

5 Charge for this endorsement
Charge for this endorsement
Total charged for the policy term
Full-Term Premium
Full-Term Premium Difference

Policy Level Coverages (Click to Expand ...)

Vehicle Premiums (Click to Collapse ...)

2018 GMC TERRAIN SLT U Total: +559.00

Recalculate

Policy Premiums (Click to Collapse ...)

Changes From Deleted Vehicles: -576.00
Underwriting Fee: 0.00
Filing Fee: 0.00
Policy Fee: 0.00
TOTAL: -17.00

[Continue Endorsement](#) [Exit - Cancel Endorsement](#)

Service Fees - Not included in Total Premium (Click to Collapse ...)

6 7
Paper Documents Fee : 10.00

Future Payments (Click to Collapse ...)

Date:	Date:	Date:	Date:
09/29/2018	10/29/2018	11/29/2018	12/29/2018
Amount	Amount	Amount	Amount
\$147.16	\$138.48	\$138.50	\$138.54

Future installments do not include service charge.

Change Summary (Click to Collapse ...)

4

Policy Level Changes (Click to Expand ...)

Vehicle Level Changes (Click to Expand ...)

Driver Level Changes (Click to Expand ...)

[Continue Endorsement](#) [Exit - Cancel Endorsement](#)

6 7

Submit Endorsement

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Forms | Program Guide | Exit - Cancel Endorsement

Policy Driver Violations Vehicle/Coverages Lienholder/Additional Interest Rate Policy **Submit Endorsement**

Policy Summary (Click to Collapse ...)

Policy Holder: [Redacted] Producer: [Redacted]
 Address: [Redacted] Policy #: [Redacted]
 Phone #: [Redacted] Status: [Redacted]
 Email: [Redacted] EFT Status: [Redacted]
 Effective Date: [Redacted] Expiration Date: [Redacted]
 Text Alert Status: [Not Enrolled](#)
 Go Paperless Status: **Enrolled - Authentication Pending**

Endorsement Effective Date: [Redacted]
 Product: FL Term: 6 Months
 Pay Plan: [Redacted] [View Producer Messages](#)

1 Make a Payment

Endorsement Premium	Previous Balance	Received ?	Amount	Mode
\$0.00	\$576.68	No	\$0.00	-Select-

IMPORTANT INFORMATION REGARDING ENDORSEMENTS

- Please DO NOT MAIL endorsements (or any other documents relating to the endorsement) to the Company unless specifically instructed to do so by a Company employee;
- Please note, the following documents **require a signature by the Named Insured and must be retained in your office:**
 - An Excluded Driver Form MUST be signed by the Named Insured if a DRIVER has been EXCLUDED;
 - UM and/or UIM Rejection FORMS MUST be signed by the Named Insured if UM and/or UIM coverage has been REJECTED or if the UM and/or UIM limits are LOWER than BI Coverage.
- Any request to reduce or delete coverage must be accompanied by a written request signed by the Named Insured and retained in your office.
- The QUOTED PREMIUM for an endorsement is subject to review and verification by the Company and may be subject to change.

By clicking the "Submit Endorsement" button, you confirm your agreement with the IMPORTANT INFORMATION REGARDING ENDORSEMENTS above.

Clicking the "Submit Endorsement" button will complete the transaction and provide a confirmation.

Submit Endorsement [Exit - Cancel Endorsement](#)

2 **3**

1 The final [Submit Endorsement] tab provides the option to [Make a Payment] if there was an increase in the quoted premium. We do **not** require a payment on an endorsement if it resulted in additional premium.

2 When you are ready to submit the endorsement then just click here!

3 You've got one final chance to cancel the endorsement. Just click here to exit out and discard any changes made.