

PTS 6.0 REFERENCE GUIDES

The following Reference Guides will walk you through step-by-step instructions for various functions in PTS so that you can complete the tasks without the assistance of our team. If you have questions after reviewing, you may contact us at 866-407-9896.



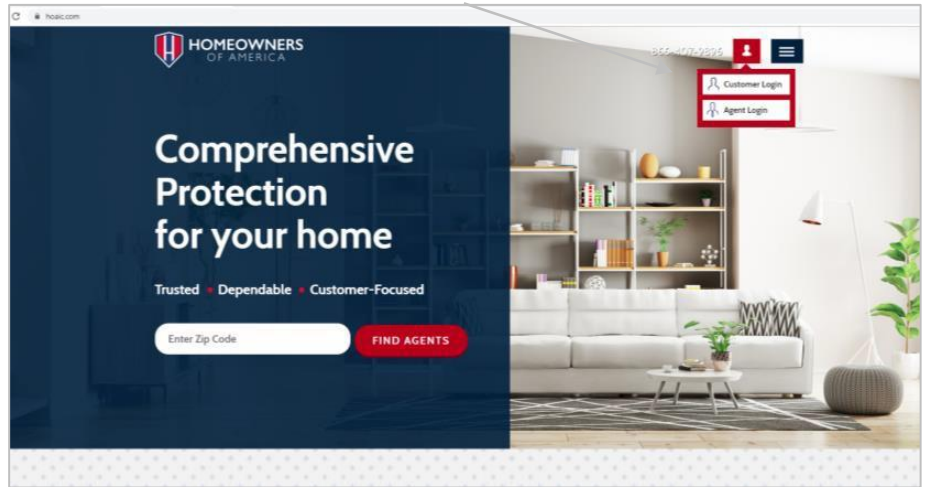
HOMEOWNERS
OF AMERICA

Quote Process Guide

Step 1

Log into the rating system. (PTS)

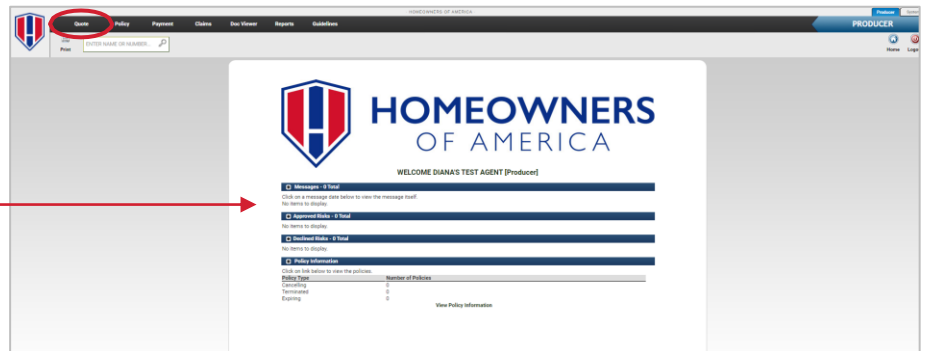
- Go to www.hoaic.com
- Click on Agent Login at the top right corner of the home page -OR-
- Scroll down on the home page to find the Agent Login box



Step 2

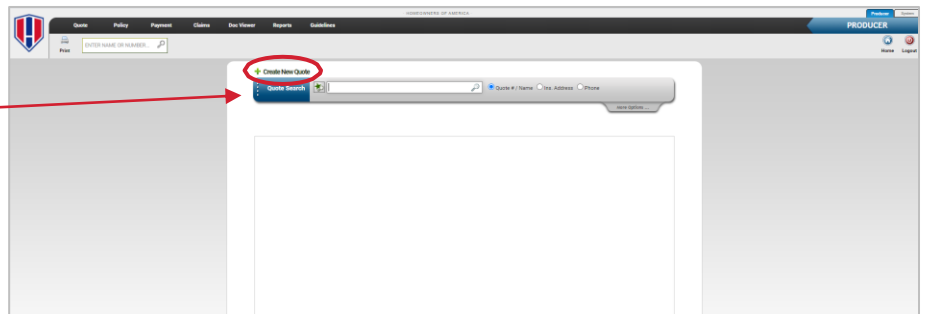
- Click on "Quote"

****Note:** Company messages and updates will be posted on this screen.



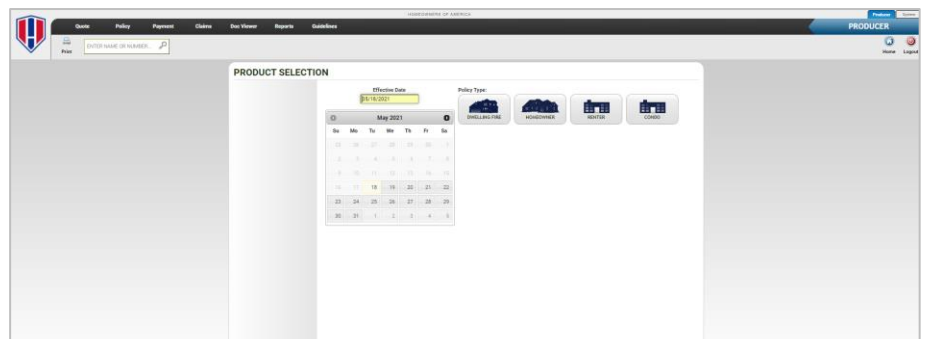
Step 3

- Use "Quote Search" to search previous quotes
- Click on "Create New Quote" to start a new quote



Step 4

- Select the effective date (quote date can be up to 60 days in advance)
- Add the product you are quoting



Quote Process Guide

Step 5

- Select the state for the product you are quoting (you will only see the states the product is offered in)
- Enter the zip code
- Select “Click Here to Start Quote”

Step 6

- Enter applicant’s information in the “General” tab.
- Required fields are in yellow.

IMPORTANT: Be sure to enter the street address as accurately as possible so that the correct Public Protection Classification (PPC) is assigned. Make sure to validate the address.

- Once required fields are complete, the CoreLogic RCT Express Valuations box will appear. You can choose Quick or Detailed Valuation.

Step 7

- Enter in risk limits and deductibles
- Add any endorsements and available discounts
- Click “Rate”

Quote Process Guide

Step 8

Quote Detail Screen

- Click on the policy type to see the Quote Declarations Page

****Note: Rate returned is before insurance score. (See next steps to verify credit.)**

HOMEOWNERS OF AMERICA

Homeowners Quote Estimates

Quote # Q13380774

Financial Responsibility

FINANCIAL RESPONSIBILITY MAY AFFECT PREMIUM AND ELIGIBILITY. PLEASE HIT THE "VERIFY FINANCIAL RESPONSIBILITY" LINK TO GET A FINAL QUOTE
Click Here to Order Financial Responsibility

Payment Plans	Total Premium	Down Pay	12 Month(s)	Installment	Installment Fee
Full Payment	\$3,735.00	\$3,735.00	\$0.00	\$0.00	\$0.00
Semi-Annual Pay Plan	\$3,735.00	\$1,915.00	\$1,820.00	\$5.00	\$5.00
Quarterly Pay Plan	\$4,052.00	\$1,084.00	\$989.33	\$5.00	\$5.00
Monthly Pay Plan	\$4,125.00	\$767.00	\$419.75	\$5.00	\$5.00

HO-3

Payment Plans	Total Premium	Down Pay	12 Month(s)	Installment	Installment Fee
Full Payment	\$3,267.00	\$3,267.00	\$0.00	\$0.00	\$0.00
Semi-Annual Pay Plan	\$3,267.00	\$1,681.00	\$1,586.00	\$5.00	\$5.00
Quarterly Pay Plan	\$3,542.00	\$957.00	\$861.67	\$5.00	\$5.00

Quotes for All Policy Types

Step 9

Quote Declaration Page

- Select the "Click Here to Order Financial Responsibility" link to go to credit information.

HOMEOWNERS OF AMERICA

Homeowners Quote Estimates

Quote # Q13380774

Financial Responsibility

FINANCIAL RESPONSIBILITY MAY AFFECT PREMIUM AND ELIGIBILITY. PLEASE HIT THE "VERIFY FINANCIAL RESPONSIBILITY" LINK TO GET A FINAL QUOTE
Click Here to Order Financial Responsibility

Payment Plans	Total Premium	Down Pay	12 Month(s)	Installment	Installment Fee
Full Payment	\$3,735.00	\$3,735.00	\$0.00	\$0.00	\$0.00
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Monthly Pay Plan	\$4,125.00	\$767.00	\$419.75	\$5.00	\$5.00

HO-3

Payment Plans	Total Premium	Down Pay	12 Month(s)	Installment	Installment Fee
Full Payment	\$3,267.00	\$3,267.00	\$0.00	\$0.00	\$0.00
Semi-Annual Pay Plan	\$3,267.00	\$1,681.00	\$1,586.00	\$5.00	\$5.00
Quarterly Pay Plan	\$3,542.00	\$957.00	\$861.67	\$5.00	\$5.00

Step 10

Credit Screen

- Enter DOB, last 4 of SSN & address information

****If you do not have the SSN, check the box indicating SSN is unavailable**

- Once information is entered, click "Order Credit" tab

FINANCIAL RESPONSIBILITY ORDERING

Q13381230 - JANE SMITH

Insurance Score

ONLY THE LAST FOUR DIGITS OF THE SOCIAL SECURITY NUMBER
ALONG WITH THE APPLICANTS DATE OF BIRTH ARE REQUIRED FOR ORDERING THE SCORE

Social Security Num (Last 4) ☐ Click here if last four of social security number is unavailable

Applicant First Middle Last Suffix DOB

JANE SMITH

Insured's Address (for ordering insurance score) Click here if address for insured is the same as property location

House Num Direction Street Name ONLY Type Direction Unit Num

Street Address 1234 NE Harrison Ave N 408

City State Zip

Dallas TX 75201

Order

Quote Process Guide

Step 11

- After clicking on "Order Credit", you will return to this Quote Detail screen.
- Select the policy type you would like to view.

HOMEOWNERS OF AMERICA

Homeowners Quote Estimates

Quote # Q13381230

Financial Responsibility

Financial responsibility has been verified for JANE SMITH.
To Continue, Select a Policy Type and Pay Plan from the Options Below.

Payment Plans	Total Premium	Down Pay	12 Month(s)	Installation	Installation Fee
Full Payment	\$3,158.00	\$3,158.00	\$0.00	\$0.00	\$0.00
Semi-Annual Pay Plan	\$3,158.00	\$1,627.00	\$1,531.00	\$5.00	\$0.00
Quarterly Pay Plan	\$3,454.00	\$927.00	\$822.33	\$5.00	\$0.00
Monthly Pay Plan	\$3,483.00	\$660.00	\$352.88	\$5.00	\$0.00

HO-B

HO-3

Step 12

- Inside the box it will state, "Financial responsibility has been verified..."
- **Note:** If result says "no-hit occurred or no report obtained" quote is still ok to submit but will not result in any additional discounts or surcharges for insurance score.

Financial Responsibility

Financial responsibility has been verified for JANE SMITH.

HOMEOWNERS OF AMERICA

Quote Number: Q13381230

Policy Coverages:

Dwelling	\$250,000
Other Structures	\$25,000
Personal Property	\$150,000
Loss of Use	\$50,000
Personal Liability	\$300,000
Medical Payments to Others	\$5,000

Total: \$3,158

Details

Quote Number :Q13381230

Policy Term: Effective 05/19/2021, Expiration 05/19/2022

Policy Type: HO-B, Date Quoted 05/19/2021 04:02 PM

Named Applicant: JANE SMITH, 9228 RIDGEVIEW DR, HURST, TX 76053

Agency Name & Address: SHAW'S TEST AGENT (1854-000-000), 123 ANY, IRVING, TX 75038, Phone: (972) 607-4241

- PRINT or EMAIL a PDF of the quote by selecting the print or email icon
- **Note:** If you would like a copy of the quote to show the insured or save for yourself, you need to print or email the quote before clicking Submit. You will not be able to pull up the PDF again after Submitting the quote.
- After credit is ordered, click "Continue to App" button to continue with the full application. (This will not bind coverage.)

Financial Responsibility

Financial responsibility has been verified for JANE SMITH.

HOMEOWNERS OF AMERICA

Quote Number: Q13381230

Policy Coverages:

Dwelling	\$250,000
Other Structures	\$25,000
Personal Property	\$150,000
Loss of Use	\$50,000
Personal Liability	\$300,000
Medical Payments to Others	\$5,000

Total: \$3,158

Details

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Agency Name & Address: SHAW'S TEST AGENT (1854-000-000), 123 ANY, IRVING, TX 75038, Phone: (972) 607-4241

Dwelling Attributes

Year Built	Story Count	Square Feet	Number of Units	County	Territory	Protection Class	Construction Type
1995	1	2453	Single Family	TARRANT	34	2	Brick/Veneer

Deductibles

Wind/Hail	All Other Perils	Premium

Print & Email

Continue to App



HOMEOWNERS
OF AMERICA

Quote Process Guide

Step 13

- Answer each question for Underwriting Verification
- Click “Continue”

The screenshot shows the 'UNDERWRITING VERIFICATION' section of the quote process. At the top right, it says 'Q13381989 · QUOTE' and 'JANE SMITH · Homeowner'. Below this is a list of seven questions with radio button options for 'Yes' or 'No'. The questions are: 1.) Are there any of the following animals on the premises: any breed or mix of Pit Bull, American Bull, American Bandogge, Presa Canario, Beauceron, Chow Chow, Cane Corso, Akita, Belgian Shepherd, Dogo Argentino (Gull Dong), Wolf hybrid, Rottweiler, Tosa Inu, Fila Brasileiro, any dog with a biting history or Exotic pet? 2.) Is the house a mobile home, enclosed mobile home, modular home or of any unusual construction such as log, underground, self-built? 3.) Is the property within 2000 feet of the Gulf of Mexico? 4.) Does the dwelling have a fuse box? 5.) Is the house on stilts or pilings over water? 6.) Does dwelling have any asbestos, synthetic stucco or wood shake siding? 7.) Does the dwelling have a flat roof or rolled roofing? At the bottom right, there is a green 'Continue' button circled in red.

Step 14

Submission Tabs

- You will need to complete the information in each tab of the Submission section. They are as follows:
 - Policy
 - Insured
 - Underwriting
 - Mortgagee
 - Location
 - Coverages
 - Golf Carts
 - Scheduled Prop
 - Addl Insured
 - UW Verification

The screenshot shows the 'SUBMISSION' section of the quote process. At the top right, it says 'Q13381989 · QUOTE' and 'JANE SMITH · HOMEOWNERS OF AMERICA · Homeowner'. On the left is a vertical list of tabs: Policy, Insured, Underwriting, Mortgagee, Location, Coverages, Golf Carts, Scheduled Prop, Addl Insured, and UW Verification. A red arrow points from the 'Underwriting' tab in the list to the 'Underwriting' section of the form. The 'Underwriting' section contains 'Policy Information' and 'Application Questions'. The 'Policy Information' section includes fields for Effective Date (05/19/2021), Expiration Date (5/19/2022), Policy Term (12), Payment Plan (Full Payment), and a checkbox for 'Title Company will pay for first term'. The 'Application Questions' section includes questions about property occupancy, townhome status, roof age, roof type, risk location, gated community, pool/spa, trampoline, burglar/fire alarm, plumbing/wiring updates, wood burning stove, and aluminum wiring. Each question has radio button or dropdown options for 'Yes' or 'No'.

- Click “Continue” at the end of each tab.

*Note – some tabs also include a “Rate” button. You will not click “Rate” until you finish the Underwriting Verification tab.

The screenshot shows the 'Policy History' section of the quote process. It contains fields for Prior Carrier, Prior Policy Number, Prior Exp Date (Mm/Dd/Yyyy), TWIA Policy Number, Flood Zone, and Flood Policy Number. At the bottom right, there is a blue 'Continue' button circled in red.

Quote Process Guide

Step 15

Mortgagee Tab

- Here you will select to Add a Mortgagee or continue without one

- If you select to Add a Mortgagee, you will be taken to the following screen where you will need to enter the bank and loan information.

*Note: by checking "Billable," you are stating the Mortgagee is going to be billed not the insured.

Navigation: Home, Claims, Doc Viewer, Reports, Guidelines

SUBMISSION Q13381989 - QUOTE
JANE SMITH - HOMEOWNERS OF AMERICA - Homeowner

Policy
Insured
Underwriting
Mortgagee
Location
Coverages
Golf Carts
Scheduled Prop
Addl Insured
UW Verification

Rate

Add Mortgagee
Continue With No Mortgagee

SUBMISSION Q13381989 - QUOTE
JANE SMITH - HOMEOWNERS OF AMERICA - Homeowner

Policy
Insured
Underwriting
Mortgagee
Location
Coverages
Golf Carts
Scheduled Prop
Addl Insured
UW Verification

Mortgagee #1

Bank / Institution 1
Bank / Institution 2
Address 1
Address 2
City / State / Zip
Interest

Mortgagee # 1
Loan #
Billable? ☒

Remove

Add Mortgagee
Continue

Step 16

Underwriting Verification Tab

- This is the last tab in the submission process. Answer the questions and click "Rate."
- By clicking "Rate," you are running all losses.

Navigation: Home, Claims, Doc Viewer, Reports, Guidelines

SUBMISSION Q13381989 - QUOTE
JANE SMITH - HOMEOWNERS OF AMERICA - Homeowner

Policy
Insured
Underwriting
Mortgagee
Location
Coverages
Golf Carts
Scheduled Prop
Addl Insured
UW Verification

Yes No Underwriting Verification Questions

1) Are there any of the following animals on the premises: any breed or mix of Pit Bull, American Bull, American Bandogge, Presa Canario, Beauceron, Chow Chow, Cane Corso, Akita, Belgian Shepherd, Dogo Argentino (Gull Dong), Wolf hybrid, Rottweiler, Tosa Inu, Fila Brasileiro, any dog with a biting history or Exotic pet?

2) Is the house a mobile home, enclosed mobile home, modular home or of any unusual construction such as log, underground, self-built?

3) Is the property within 2000 feet of the Gulf of Mexico?

4) Does the dwelling have a fuse box?

5) Is the house on stilts or pilings over water?

6) Does dwelling have any asbestos, synthetic stucco or wood shake siding?

7) Does the dwelling have a flat roof or rolled roofing?

Rate

Quote Process Guide

Step 17

Application Review

- If everything is correct, select “Continue to Bind.”
- If something needs to be changed, select “Re-work Application” and update the information.

HOMEOWNERS OF AMERICA Application Review · Q13383256

Re-work Application ← | → Continue to Bind

Policy Term		Policy Type
Effective: 05/19/2021	Expiration: 05/19/2022	HO-B

Named Applicant		Agency Name & Address
JANE SMITH 9228 RIDGERIVER DR HURST, TX 76053 (817) 282-1695 JSMITH@YAHOO.COM	DIANA'S TEST AGENT (1884-000-000) 123 ANY IRVING, TX 75038 (972) 607-4241	

Dwelling Attributes								
Year Built	Story Count	Square Feet	Number of Units	Hail Resistant Roof	County	Territory	Protection Class	Construction Type
2021	1	1773	Single Family	No	TARRANT	32	1	Brick/Veneer

Deductibles		
Wind/Hail	All Other Perils	Premium
\$5,000 (2 %)	\$2,500 (1 %)	-\$142

Additional Insureds		
Name	Address	Policy Interest
No Additional Insureds		

Mortgagees		
Bank / Institution	Address	Billable
No Mortgagees		

Coverages		
Coverage	Limit	Premium
Dwelling	\$250,000	\$1534.00
Other Structures	\$25,000	INCL
Personal Property	\$150,000	\$94.00
Loss of Use	\$50,000	INCL
Personal Liability	\$100,000	\$35.00

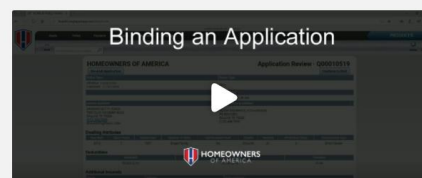
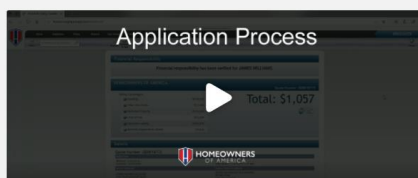
Additional Resources

- Please visit <https://hoaic.com/agent-resources/> for additional videos on how to:
 - Begin a Quote
 - Complete the Application Process
 - Change Effective Date
 - Bind an Application

Tips and Tricks for PTS 6.0

Please see the videos and PDF document below for help with our new PTS 6.0 rating system.

Please use this document for help with imported quotes.

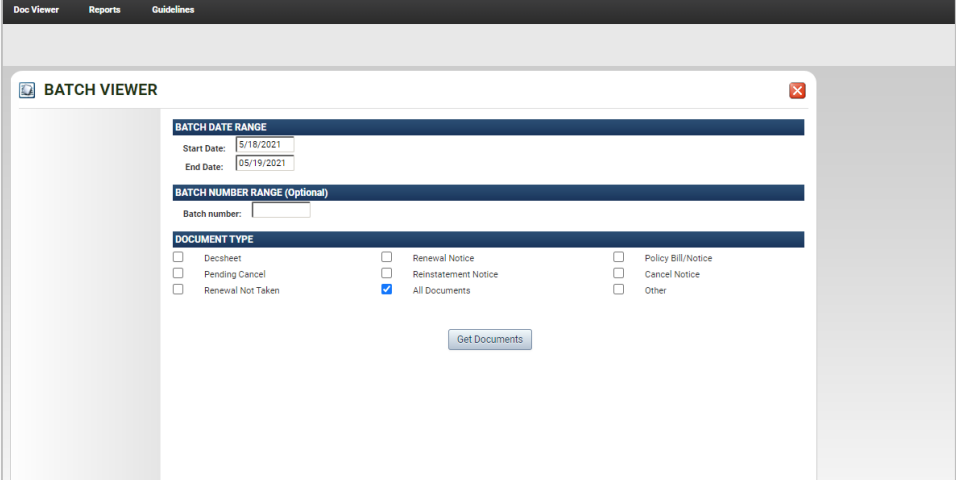


HOMEOWNERS
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Quote Process Guide

Batch Viewer

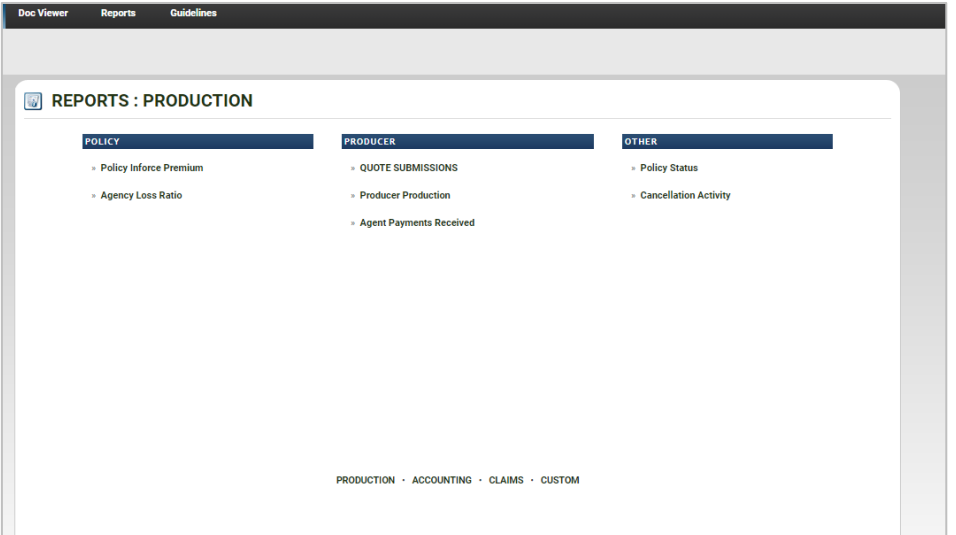
The Batch Viewer is found under the Doc Viewer tab



The screenshot shows the 'BATCH VIEWER' window within a software application. At the top, there are tabs for 'Doc Viewer', 'Reports', and 'Guidelines'. The 'BATCH VIEWER' window has a title bar with a close button. Inside, there are three main sections: 'BATCH DATE RANGE' with 'Start Date' (5/18/2021) and 'End Date' (05/19/2021) fields; 'BATCH NUMBER RANGE (Optional)' with a 'Batch number' field; and 'DOCUMENT TYPE' with a grid of checkboxes. The checkboxes are: 'Deedsheet', 'Pending Cancel', 'Renewal Not Taken', 'Renewal Notice', 'Reinstatement Notice', 'All Documents' (checked), 'Policy Bill/Notice', 'Cancel Notice', and 'Other'. A 'Get Documents' button is at the bottom right.

Reports

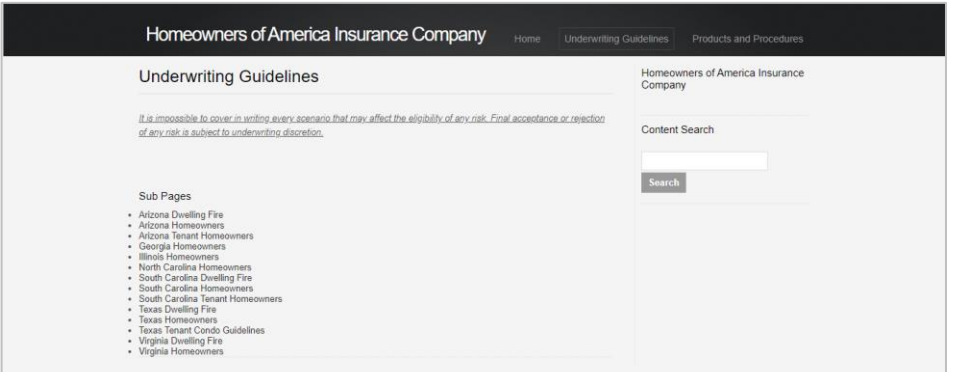
Policy, Producer and Other Reports can be found under the Reports tab



The screenshot shows the 'REPORTS : PRODUCTION' window. It has a title bar with 'Doc Viewer', 'Reports', and 'Guidelines' tabs. The main content area is divided into three columns: 'POLICY', 'PRODUCER', and 'OTHER'. Under 'POLICY' are 'Policy Inforce Premium' and 'Agency Loss Ratio'. Under 'PRODUCER' are 'QUOTE SUBMISSIONS', 'Producer Production', and 'Agent Payments Received'. Under 'OTHER' are 'Policy Status' and 'Cancellation Activity'. At the bottom, there is a breadcrumb trail: 'PRODUCTION > ACCOUNTING > CLAIMS > CUSTOM'.

Guidelines

All Underwriting Guidelines for each state are located under the Guidelines tab.

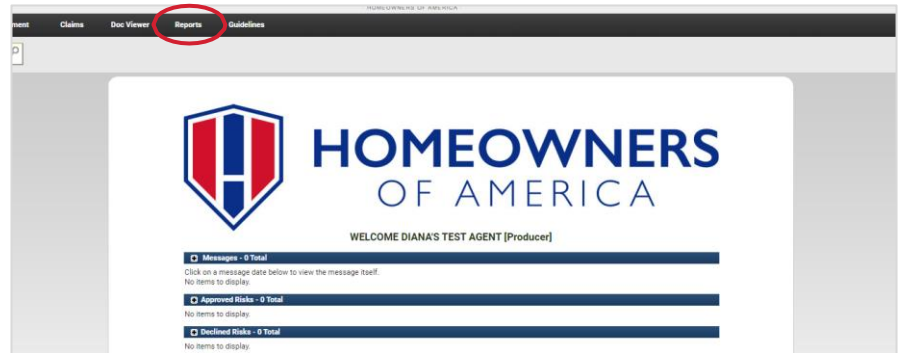


The screenshot shows the 'Homeowners of America Insurance Company' website. The header has 'Homeowners of America Insurance Company' and links for 'Home', 'Underwriting Guidelines', and 'Products and Procedures'. The main content area is titled 'Underwriting Guidelines' and includes a disclaimer: 'It is impossible to cover in writing every scenario that may affect the eligibility of any risk. Final acceptance or rejection of any risk is subject to underwriting discretion.' Below this is a 'Sub Pages' list with links to various state-specific guidelines (Arizona, Georgia, Illinois, North Carolina, South Carolina, Texas, Virginia). On the right, there is a 'Content Search' box with a search button.

Report Access Guide

Home Screen:

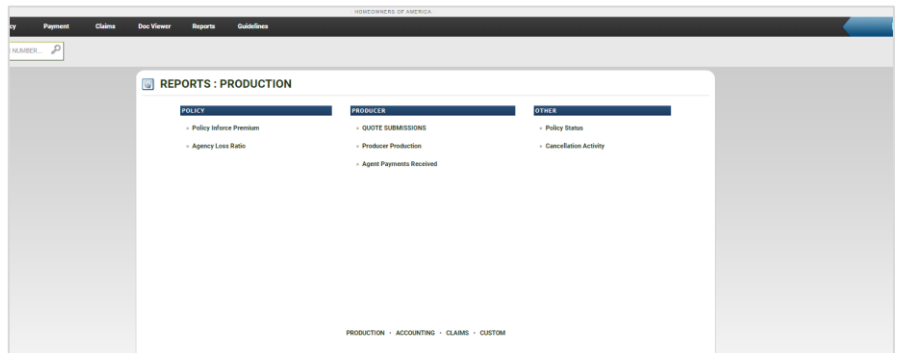
- Click “Reports” to access all agency reports



Report Selection Screen:

Follow the next steps for instructions regarding each of these reports:

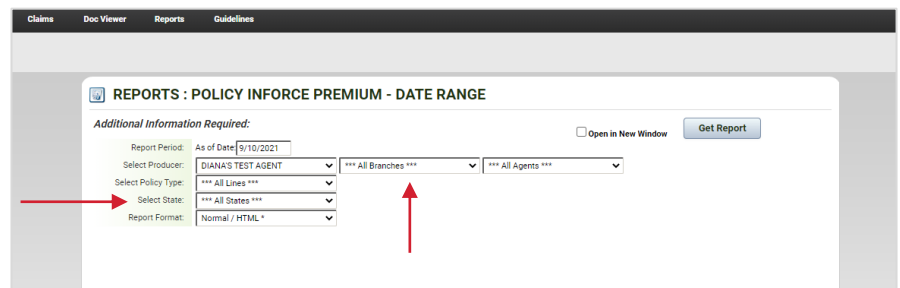
- Policy Inforce Premium
- Agency Loss Ratio
- Producer Production
- Policy Status
- Claim Status
- Commissions



Report Option Tip

Many of the reports have these two options to choose from:

- If you have multiple locations OR are a multi-state agent and wish to view the report for a single office location or single state, you will use the “Select Branch” or “Select State” drop-down.
- If neither of these apply to your agency, you may leave them as “All Branches” and “All States,” and it will not affect your report.



Report Access Guide

Policy Inforce Premium Report:

- Select As of Date
- Select Policy Type (or leave as "All Lines")
- Click "Get Report"

REPORTS : POLICY INFORCE PREMIUM - DATE RANGE

Additional Information Required:

Report Period: As of Date 9/10/2021

Select Producer: DIANA'S TEST AGENT

Select Policy Type: *** All Lines ***

Select State: *** All States ***

Report Format: Normal / HTML *

Open in New Window ☐

Get Report

Agency Loss Ratio Report:

- Select Month and Year
- Select Policy Type (or leave as "All Lines")
- Choose "Selected Month" or "Year to Date"

****Note:** You have the option to include or exclude catastrophe losses

- Click "Get Report"

REPORTS : AGENCY LOSS RATIO - AGENCY SUMMARY

Additional Information Required:

Report Period: Month August Year 2021

Select Producer: DIANA'S TEST AGENT

Select Policy Type: *** All Lines ***

Select State: *** All States ***

Report Format: Normal / HTML *

Month/YTD: ☒ Selected Month ☐ Year To Date

Sort By: ☒ Agency Name ☐ Agency Code

Catastrophe: ☒ Excluded ☐ Included

Open in New Window ☐

Get Report

Producer Production Report:

- Select Start and End Date
- Select Policy Type (or leave as "All Lines")
- Click "Get Report"

REPORTS : PRODUCER PRODUCTION - PRODUCTION DATES

Additional Information Required:

Report Period: Start Date 9/1/2021 End Date 9/13/2021 [Yesterday] [Today] [WTD] [MTD] [YTD]

Select Producer: DIANA'S TEST AGENT

Select Policy Type: *** All Lines ***

Select State: *** All States ***

Report Format: Normal / HTML *

Production: ☒ All ☐ Online ☐ Internal

Open in New Window ☐

Get Report

Policy Status Report:

- Select Start and End Date
- Select Status(es)
- Click "Get Report"

REPORTS : POLICY STATUS - POLICY STATUS AND DATE RANGE

Additional Information Required:

Report Period: Start Date 9/1/2021 End Date 9/13/2021 [Yesterday] [Today] [WTD] [MTD] [YTD]

Select Producer: DIANA'S TEST AGENT

Select Policy Type: *** All Lines ***

Select State: *** All States ***

Report Format: Normal / HTML *

Producer Info: ☐ (Includes Producer Code and Location)

Statuses To Include: Pending, Bound, Pen Cancel, Pen Renew, Terminated, Declined, Expired, Expiring

Open in New Window ☐

Get Report



HOMEOWNERS
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Report Access Guide

Producer Claims Status Report:

- Click "Claims" under the Report Selection box

REPORTS : PRODUCTION

POLICY

- Policy Inforce Premium
- Agency Loss Ratio

PRODUCER

- QUOTE SUBMISSIONS
- Producer Production
- Agent Payments Received

OTHER

- Policy Status
- Cancellation Activity

PRODUCTION > ACCOUNTING > CLAIMS > CUSTOM

- Select "Claims Status"

REPORTS : CLAIMS

Claims Status

- Select Start and End Date
- Select Date Range(s) for claim (Date of Loss is usually best)
- Select either Coverage or Incident to Report On
- Choose the claims Status(es) (All, Open, In Review, etc.)
- Click "Get Report"

REPORTS : CLAIMS STATUS - CLAIMS

Additional Information Required:

Report Period: Start Date: 9/1/2021 End Date: 9/13/2021 [Yesterday] [Today] [WTD] [MTD] [YTD]

Select Producer: DIANA'S TEST AGENT *** All Branches ***

Report Format: Normal / HTML *

Date Range(s): ☒ Date of Loss ☐ Policy Effective Date

Report On: ☒ Coverage ☐ Incident

Select Status(es): ALL * Open In Review Litigation Subrogation Closed

Sort By: Date Opened

Use Catastrophe: ☐

Open in New Window ☐ Get Report



HOMEOWNERS
OF AMERICA

Report Access Guide

Commission Report:

- Click “Accounting” under the Report Selection box
- Select “Individual Statement”
- Select Start and End Date
 - **IMPORTANT:** Use the Start Date for the month that the funds were deposited and End Date a few business days later. (Example: For January commissions, use dates of Feb 1 – Feb 5)
- Click “Get Report”

REPORTS : PRODUCTION

POLICY	PRODUCER	OTHER
<ul style="list-style-type: none">Policy Inforce PremiumAgency Loss Ratio	<ul style="list-style-type: none">QUOTE SUBMISSIONSProducer ProductionAgent Payments Received	<ul style="list-style-type: none">Policy StatusCancellation Activity

PRODUCTION · ACCOUNTING · CLAIMS · CUSTOM

REPORTS : ACCOUNTING

COMMISSIONS	DEPOSITS REGISTERS
<ul style="list-style-type: none">Individual Statement	<ul style="list-style-type: none">Producer ACHCommission ACH

REPORTS : INDIVIDUAL STATEMENT - PAYMENT DATES

Additional Information Required:

Report Period: Start Date 9/1/2021 End Date 9/13/2021 [Yesterday] [Today] [WTD] [MTD] [YTD] ☐ Open in New Window **Get Report**

Select Producer: DIANA'S TEST AGENT *** All Branches *** *** All Agents ***

Report Format: Normal / HTML *

Batch Documents Reference Guide

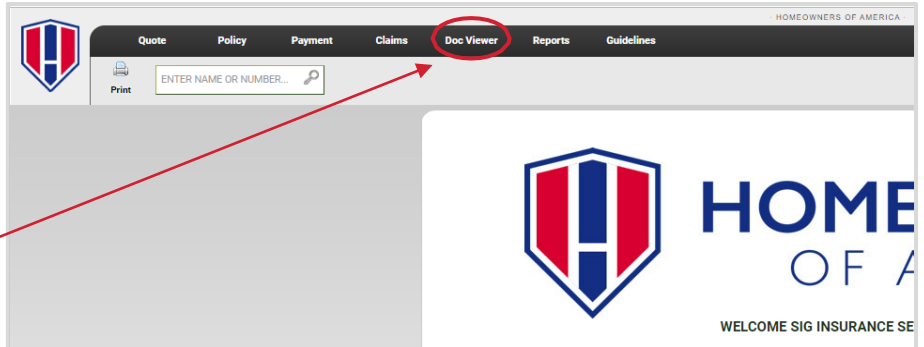
(Electronic Document Notifications)

If your agency is signed up to receive Electronic Document Notifications, please follow these procedures:

You will receive an email from CSR@HOAIC with subject line "Documents from Batch" when you have new documents available for viewing. Follow the steps below to retrieve your documents.

Be sure to check Spam & Junk Mail folders

- Log into PTS
- Click "Doc Viewer" on toolbar



Step 1:

Retrieve Batch Items:

1. Select Batch Date Range: Docs are available for any date. The date range may not exceed 7 days and should include the day you are searching.
-OR-
2. Select Batch Number (noted in email)
3. Agency Branches
Home Office: Select branch if necessary. (Use the drop down to select ALL or a single branch office location)
This is only available if you have branch office locations, and you are logged in as the home office.
Branch Office Locations: You will not have the drop-down option shown in #3 in the diagram.
4. Select Document Type (All Documents is selected by default.)
5. Click "Get Documents"

****Remember: the batch date range may not exceed 7 days****

Step 2:

View / Print Policy Documents:

- This shows the Policy Number, Insured Name, Document Type, and Batch Date
- You can view or print the document (PDF form)
- All documents are defaulted to print. Uncheck the boxes next to the documents you do not wish to print.

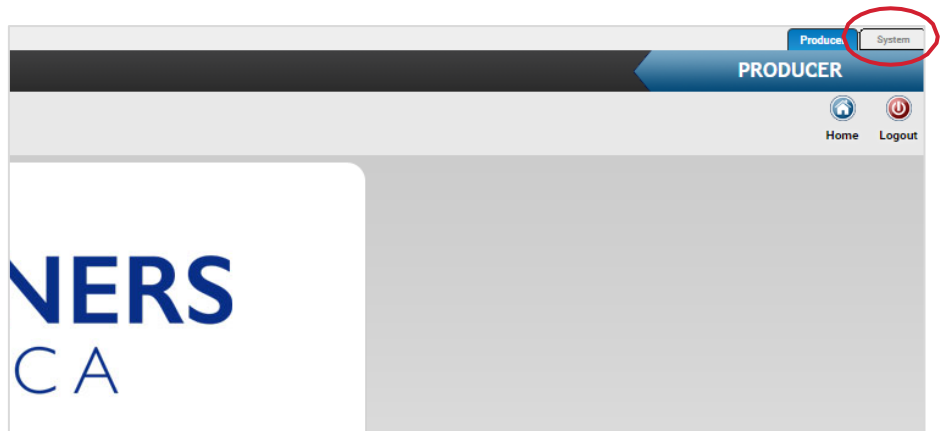
Policy Number	Insured Name	Type	Batch Date	Recipient	Print
1. Policy #	Policy name	Billing Policy Bill/Invoice	12/09/2019	PR	<input checked="" type="checkbox"/>
Page(s): 1					
<div>Cancel Print Documents</div>					

The Policy Number and Insured Name columns will display your Insured's information.

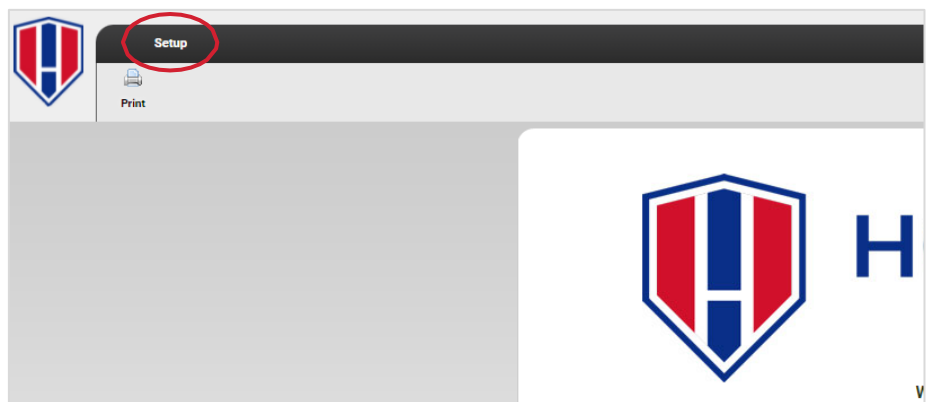
Blank Forms Reference Guide

You can access Blank Forms by using the following instructions:

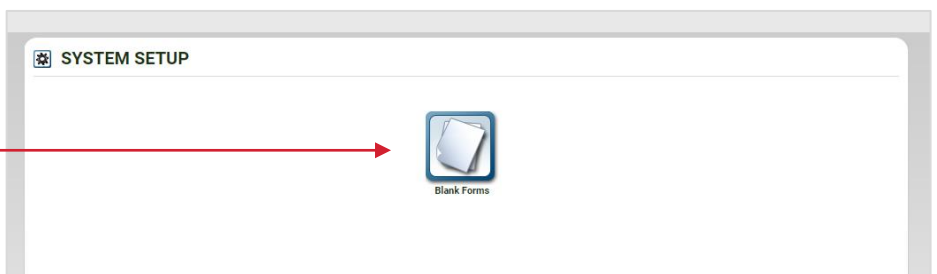
- Log into PTS
- Select the "System" tab from the Home screen



- Click on "Setup"



- Select the "Blank Forms" icon



- Choose the Product type from the dropdown (Homeowners, Condo, etc.)
- Select the State from the dropdown
- Click "Load"

