

Working with Appulate Uplink™

Job Aid



Chesapeake Employers' Insurance Company is in partnership with Appulate Inc. to provide Agents with an upload solution for ACORD applications. This upload process will allow the Agent to upload/bridge ACORD applications into their eServices account, where they will proceed with the quote process.

This job aid shows you how to use Appulate Uplink™ to upload an ACORD application directly from your Agency system to Chesapeake Employers' Insurance Company.

In order to use Appulate to upload ACORD applications to your Chesapeake Employers' eServices account, you will need the following:

- Appulate User account
- Appulate Uplink™ Print Driver installed on your computer

Chesapeake Employers is unable to create any accounts in Appulate. Therefore, if you are a new user or unsure if you are an existing Appulate user, you can contact Appulate Customer Support at support@appulate.com and they will assist you in getting signed up. They can also assist you with accessing and downloading the necessary Appulate Uplink™ Print Driver, or you can use the instructions in Step 2 below.

SIGNING IN & DOWNLOADING APPULATE UPLINK™ PRINT DRIVER

1 ► Go to <https://ceiwc.appulate.com/signin>.

On the sign in page, enter your Appulate specific Username (Email) and Appulate Password, and click **SIGN IN**. If you do not know or remember your password, click **Forgot password?**

SIGN IN TO CHESAPEAKE EMPLOYERS' INSURANCE COMPANY

Email

Password

☒ Remember me [Forgot password?](#)

SIGN IN

Don't have an account? [Sign up now!](#)

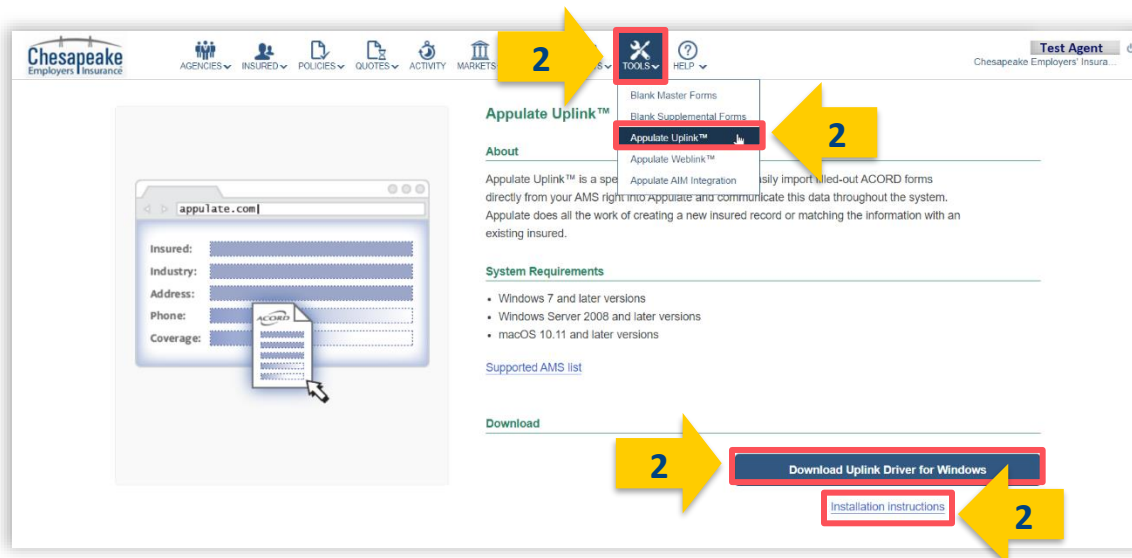
Note: If you already have the Appulate Uplink Print Driver installed on your Personal Computer, you can skip Step 2.

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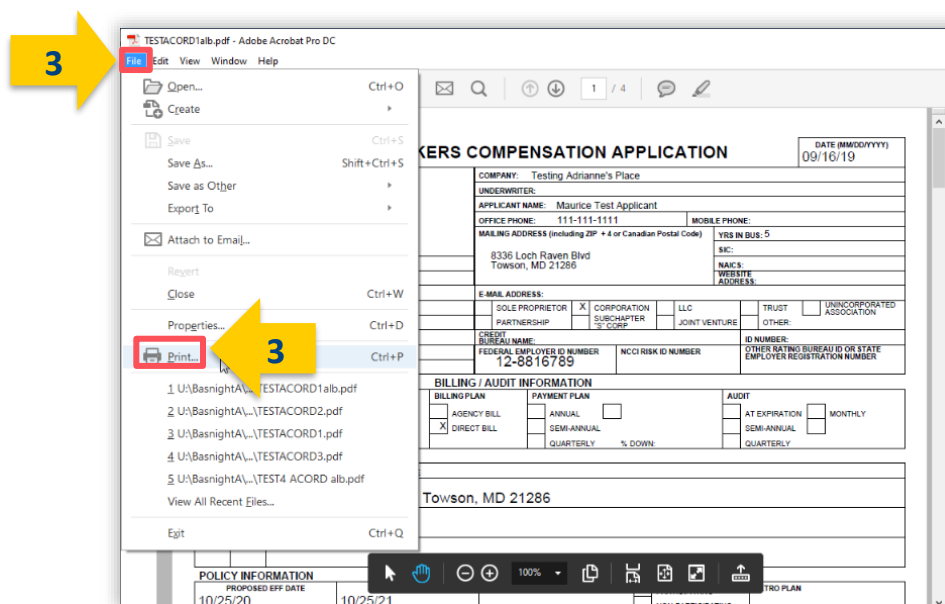
- 2 ▶ Once signed in, click the **TOOLS** menu, and select **Appulate Uplink**. Click the blue **Download Uplink Driver for Windows** button to download the driver.

Note: For detailed information on installing the driver, click the blue **Installation Instructions** link.



UPLOADING AN ACORD APP FROM YOUR PC

- 3 ▶ Navigate to an ACORD application (that has been printed, not scanned) on your computer and open it.
- From the **File** menu, select the **Print** option.
 - Select **Appulate Uplink** from the **Printer** drop-down menu.
 - Click the **Print** button.



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The screenshot shows the ACORD WORKERS COMPENSATION APPLICATION form. The 'Appulate Uplink' print dialog box is open, showing various settings like 'Pages to Print' (All), 'Page Sizing & Handling' (Fit), and 'Orientation' (Auto portrait/landscape). A yellow arrow labeled '3' points to the 'Appulate Uplink' dropdown menu, and another yellow arrow labeled '3' points to the 'Print' button at the bottom right of the dialog.

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The following dialog box displays for you to enter your Appulate credentials.

- Enter your email address in the first box.
- Enter your Appulate password in the **Password** box.
- Click the **Send** button.

The screenshot shows the 'Appulate Uplink™ 3.0.0.237' Sign In dialog box. It has two input fields for email and password, both highlighted with red boxes. A yellow arrow labeled '4' points to the password field. Another yellow arrow labeled '4' points to the 'Send' button at the bottom.

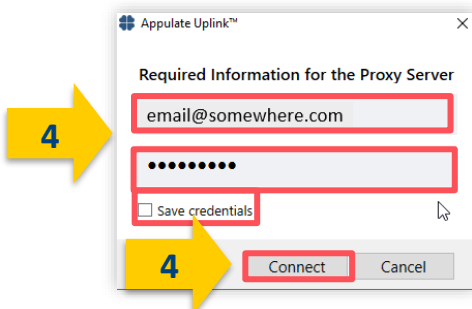
The following dialog box displays letting you know the application is being uploaded.

The screenshot shows the 'Appulate Uplink™ 3.0.0.237' Sending a Document dialog box. It displays 'Sending a Document to Appulate...' with a progress bar at 0%. A 'Cancel' button is at the bottom right.

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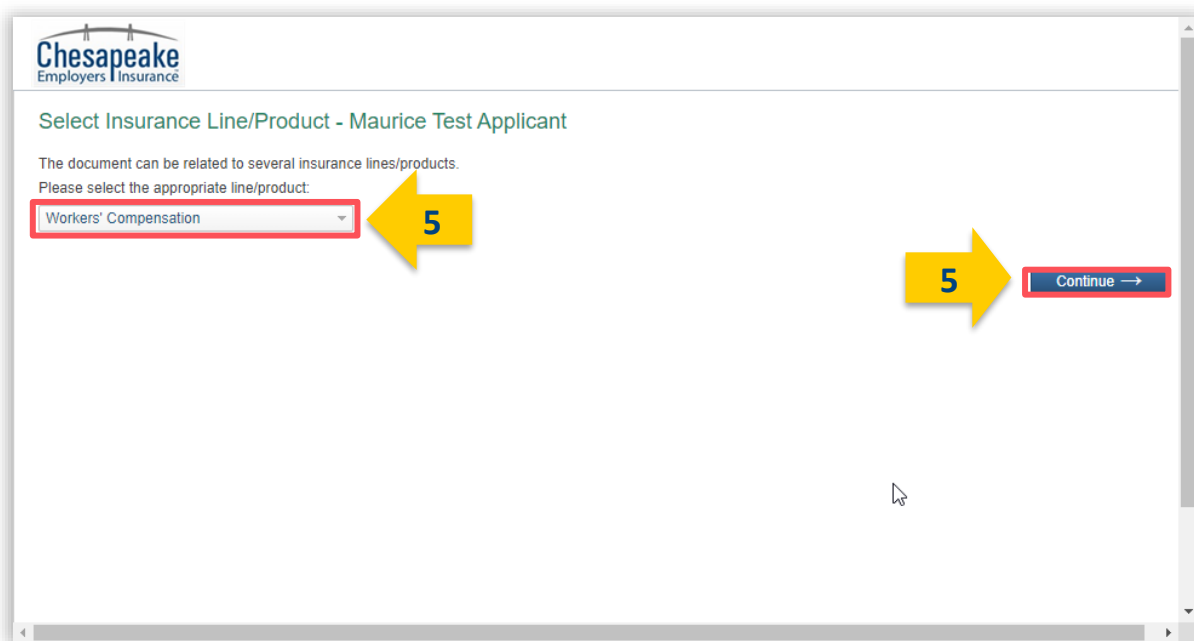
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Note: If the dialog box above does not move off 0%, there may be another box hidden behind it. Use your cursor to move the box to the side. The following dialog box may be revealed requesting a username and password.



- If this box is present, enter your Appulate username and password and click the **Save credentials** box to ensure you do not receive this box the next time you upload an application.
- Click the **Connect** button.

- 5** ▶ After the application has been uploaded, you will be prompted to select the Insurance Line. Select **Workers' Compensation** if it is not already selected and click the **Continue** button.



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Your next screen will depend on how your Agency is configured in Appulate. Some Agencies will go directly into the Appulate submission user interface (**Step 6**), while other Agencies may be configured to see the following screen giving them two submission options.

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Submission - Test Applicant

Please select and click "Send" to forward your submission to the desired destination.

☐ Appulate

☒ Directly to Your Market(s)

☒ Check All

☒ ASIA - Associated Specialty Insurance Agency, Inc.

☒ Chesapeake Employers' Insurance Company

Options

Send →

This Job Aid is describing Option 1-- **Appulate**. The second option -- **Directly to Your Market(s)** bypasses the Appulate user interface and sends your ACORD application straight to the Carrier or Markets quoting system(s), if selected.

When using the **Directly to Your Market(s)** option, you will also get the following screen, letting you know your request has been successfully submitted.

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APPULATE

Submission - Test Applicant

You have forwarded your requests directly to the following markets:

Chesapeake Employers' Insurance Company

Your request has been successfully submitted. To review it and finish your submission, please [click here](#).

Note: Contact Appulate Support if you want Option 2 -- **Directly to Your Market(s)** turned on.

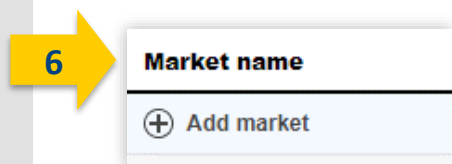
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- 6 ▶ After uploading, the Status will display as **Not submitted yet** with the **Request quote** button displaying green. If needed, you can edit the information using the tabs in the Appulate application. When ready, click the **Request quote** button.

Note: If there is no Market name showing, click the **Add Market** button and select Chesapeake Employers' Insurance Company.



Chesapeake Employers Insurance

Appulate User
Chesapeake Employers

Maurice Test Applicant | Workers' Compensation 10/25/2020 Request in Progress | [No Main Contact]

Market name	Est. Premium (\$)	Status	Contact	Action
Chesapeake Employers' Insurance Company		Not submitted yet		Request quote

Subject > Underwriting > Coverage History > Policy

FEIN: 12-8816789 (9 digit Federal Employer Identification Number)

Locations

Loc #	Street	City	State	Zip
1	8336 Loch Raven Blvd	Towson	MD	21286

[+ New record](#)

Payroll and Rating

Loc#	State	Class Code	Descr Code	Description	# FTEs	# PTEs	Est Payroll
1	MD	8810		clerical	1		\$ 500,000

[+ New record](#)

Rating Factors

State	Experience Or Merit Modification

[+ New record](#)

Detailed description of operations: test

[Next](#)

To create a blank master form go to the "Tools -> Blank Master Forms" page. It's that easy!

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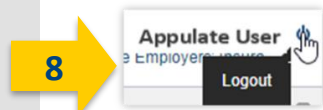
- 7 ► The **Status** of the application will change to **Submission Initiated**, which indicates it should now be in eServices under your **Accounts**.

Once submitted, the **Action** will change to **Finish submission** and if you click on this button, it will take you to the Chesapeake Employers' login page to log in to your eServices account, where you can locate the uploaded application and finish the Quote process.

Note: As with any upload process, it is up to the Agent to proceed to the Carrier system to verify data correctness and complete the Quote.

The screenshot shows the Appulate Uplink interface for a user named Maurice Test Applicant. The top navigation bar includes links for INSURED, POLICIES, QUOTES, ACTIVITY, MARKETS, SETUP, REPORTS, TOOLS, and HELP. The user's name, MitchDirect Strong, is in the top right corner. The main content area displays the application details for 'Chesapeake Employers' Insurance Company'. The 'Status' field is highlighted with a red box and a yellow arrow labeled '7', showing 'Submission Initiated'. The 'Action' field is also highlighted with a red box and a yellow arrow labeled '7', showing 'Finish submission...'. Below the status and action fields, there are sections for 'Subject' (Underwriting, Coverage History, Policy), 'FEIN' (12-8816789), 'Locations' (a table with columns: Loc #, Street, City, State, Zip), 'Payroll and Rating' (a table with columns: Loc#, State, Class Code, Descr Code, Description, # FTEs, # PTEs, Est Payroll), and 'Rating Factors' (a table with columns: State, Experience Or Merit Modification). A 'Next' button is located at the bottom right of the form.

- 8 ► To log out of Appulate, select the logout icon located in the top right corner of the screen next to your username.



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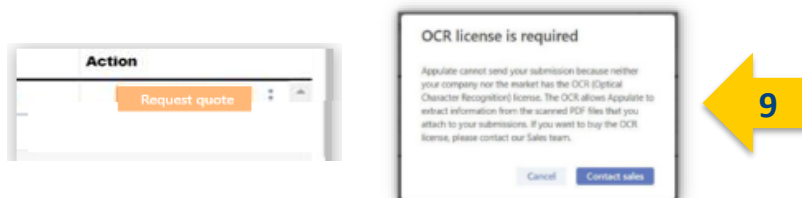


UPLOADING A SCANNED ACORD APPLICATION

- 9 ▶ To upload a scanned ACORD application, follow steps 3 and 4 above. **Chesapeake Employers currently does not have a software License to use the Scanned (OCR) option in Appulate. If you are using a scanned document, you will not be able to complete the upload.**

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Note: Chesapeake Employers currently does not have a software License to use the Scanned (OCR) option in Appulate. You will encounter the following messages while initiating the **Request quote** in Step 6 above. You can either login to your eServices account and enter the application manually or Email to equotes@ceiwc.com for manual entry by an Underwriter.



Important: The Appulate system is very robust and is used by many Carriers and Agents in more advanced ways than how Chesapeake Employers is currently licensed to use it. As shown in step 6, the uploaded ACORD application can be edited from its original upload; but for the purpose of uploading applications directly to eServices, these enhanced features are not required and will deviate from the original ACORD.

The uploaded ACORD application submitted through Appulate will go into eServices with a status of **Started**. Agents can delete the submission completely in eServices and resubmit from

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Appulate if needed. As with any upload process, it is up to the Agent to proceed to the carrier system to verify data correctness and complete the Quote.

10 ► TRAINING & SUPPORT

The Appulate **HELP** section is a great resource for Training, FAQs, Videos, and Webinars.



The Appulate application is being supported by Appulate and all errors or questions concerning this application should be directed to Appulate Customer Support at support@appulate.com.

If you have any questions once the application is in eServices, please contact the Underwriting Hotline at 410-494-2430.