

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?**

A screenshot of the "SIGN IN TO CHESAPEAKE EMPLOYERS' INSURANCE COMPANY" page. The page has a light gray background with blue text for the company name and a blue "SIGN IN" button. There are three red rectangular boxes: one for "Email", one for "Password", and one for the "Forgot password?" link. A yellow arrow with the number "1" points to the "Email" box. Another yellow arrow with the number "1" points to the "Forgot password?" link. A third yellow arrow with the number "1" points to the "SIGN IN" button. At the bottom, there is a link for "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.

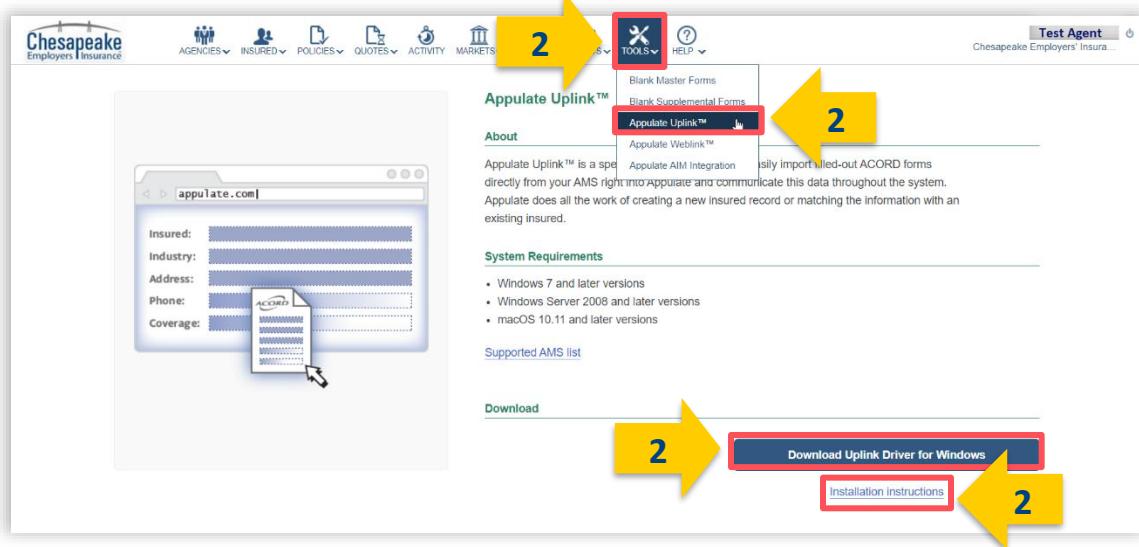
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2 Once signed in, click the **TOOLS** menu, and select **Appulate Uplink**. Click the blue **Download Uplink Driver for Windows** button to download the driver.

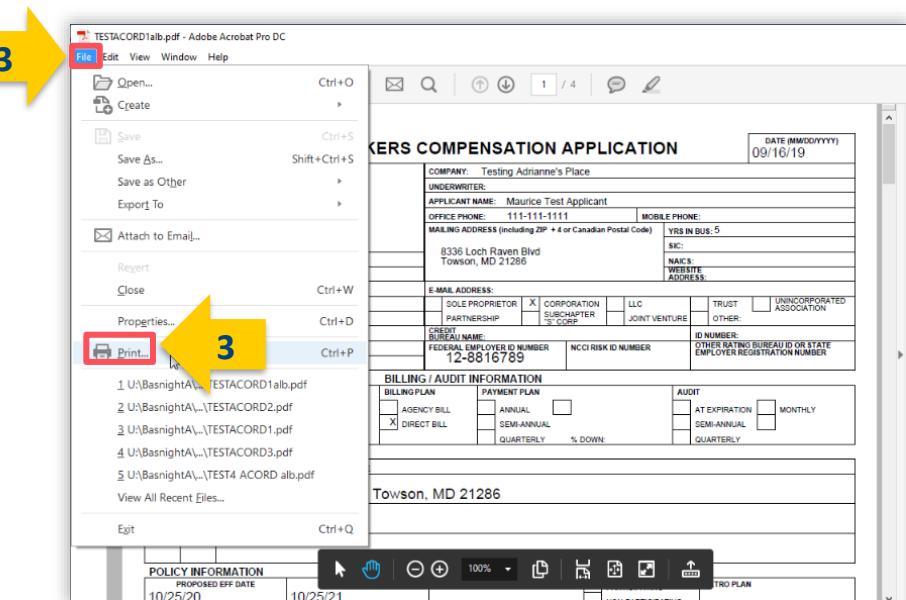
Note: For detailed information on installing the driver, click the blue **Installation Instructions** link.



UPLOADING AN ACORD APP FROM YOUR PC

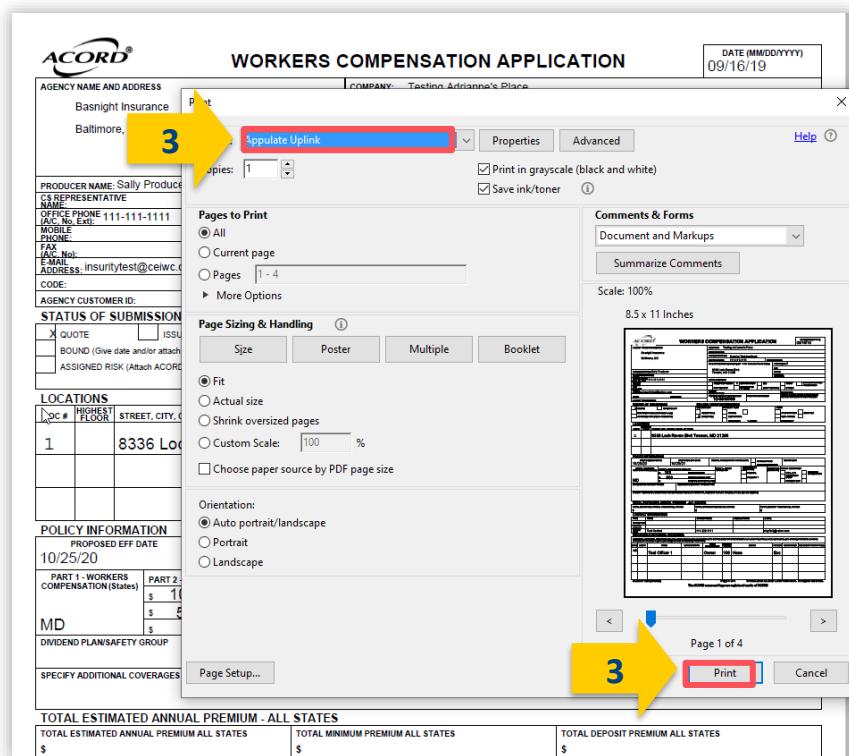
3 Navigate to an ACORD application (that has been printed, not scanned) on your computer and open it.

- From the **File** menu, select the **Print** option.
- Select **Appulate Uplink** from the **Printer** drop-down menu.
- Click the **Print** button.



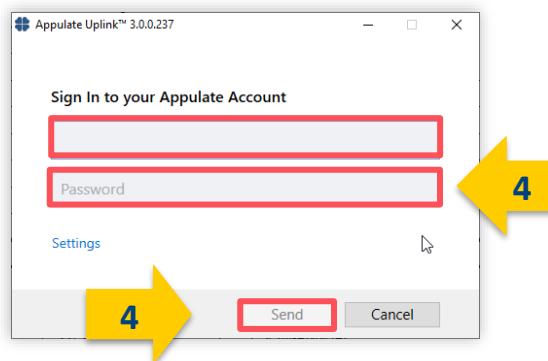
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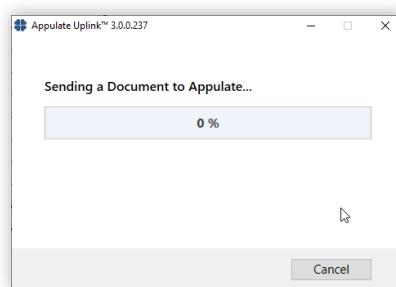


4 ► The following dialog box displays for you to enter your Appulate credentials.

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



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

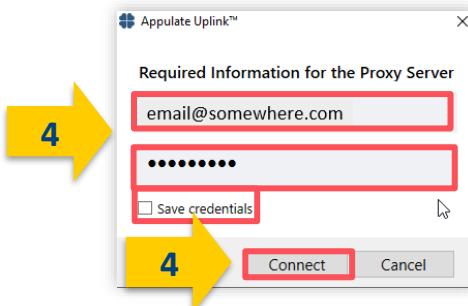


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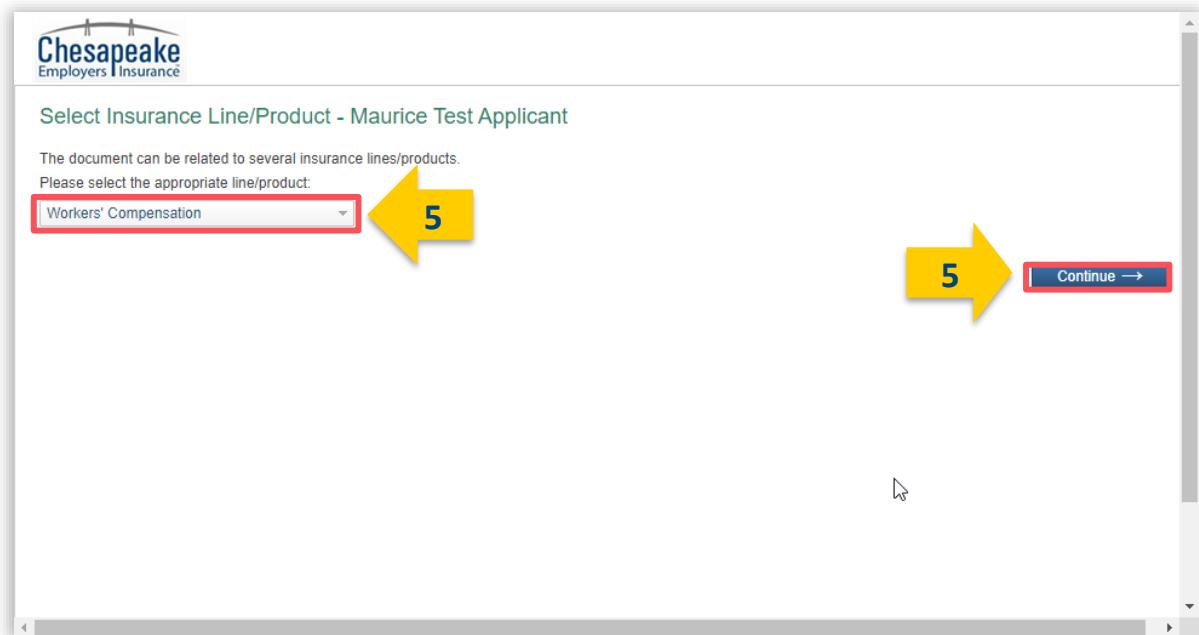


Note: If the dialog box above does not move off 0%, there may be another box hidden behind it. Use your cursor to move the box to the side. The following dialog box may be revealed requesting a username and password.



- 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.

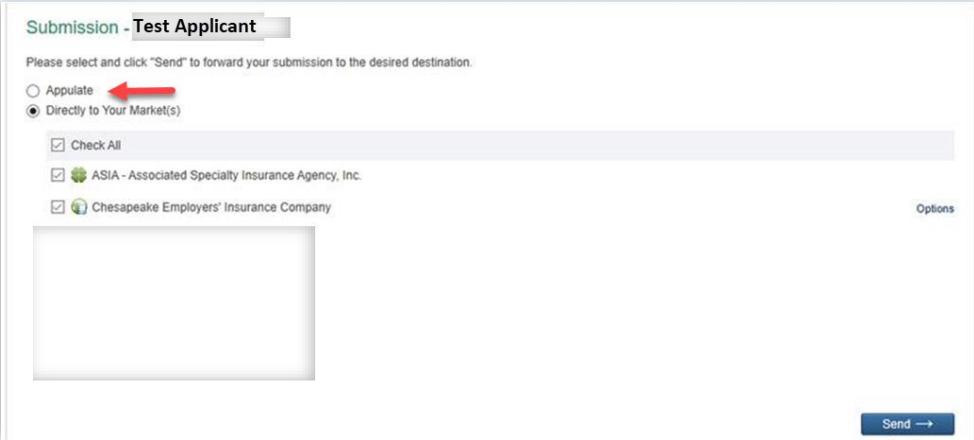


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Your next screen will depend on how your Agency is configured in Appulate. Some Agencies will go directly into the Appulate submission user interface (**Step 6**), while other Agencies may be configured to see the following screen giving them two submission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

5



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

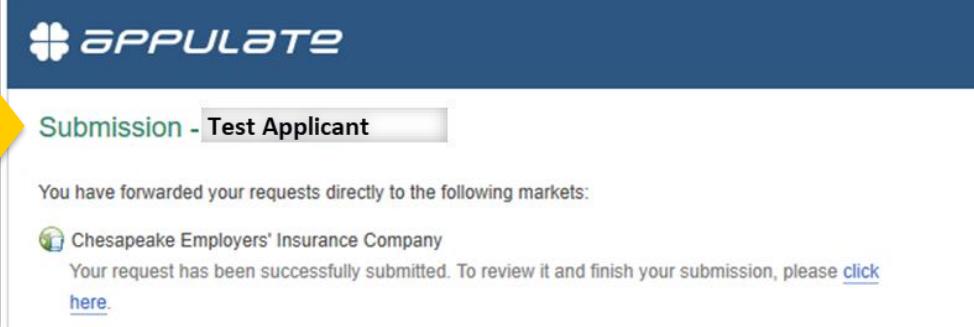
Options

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](#).

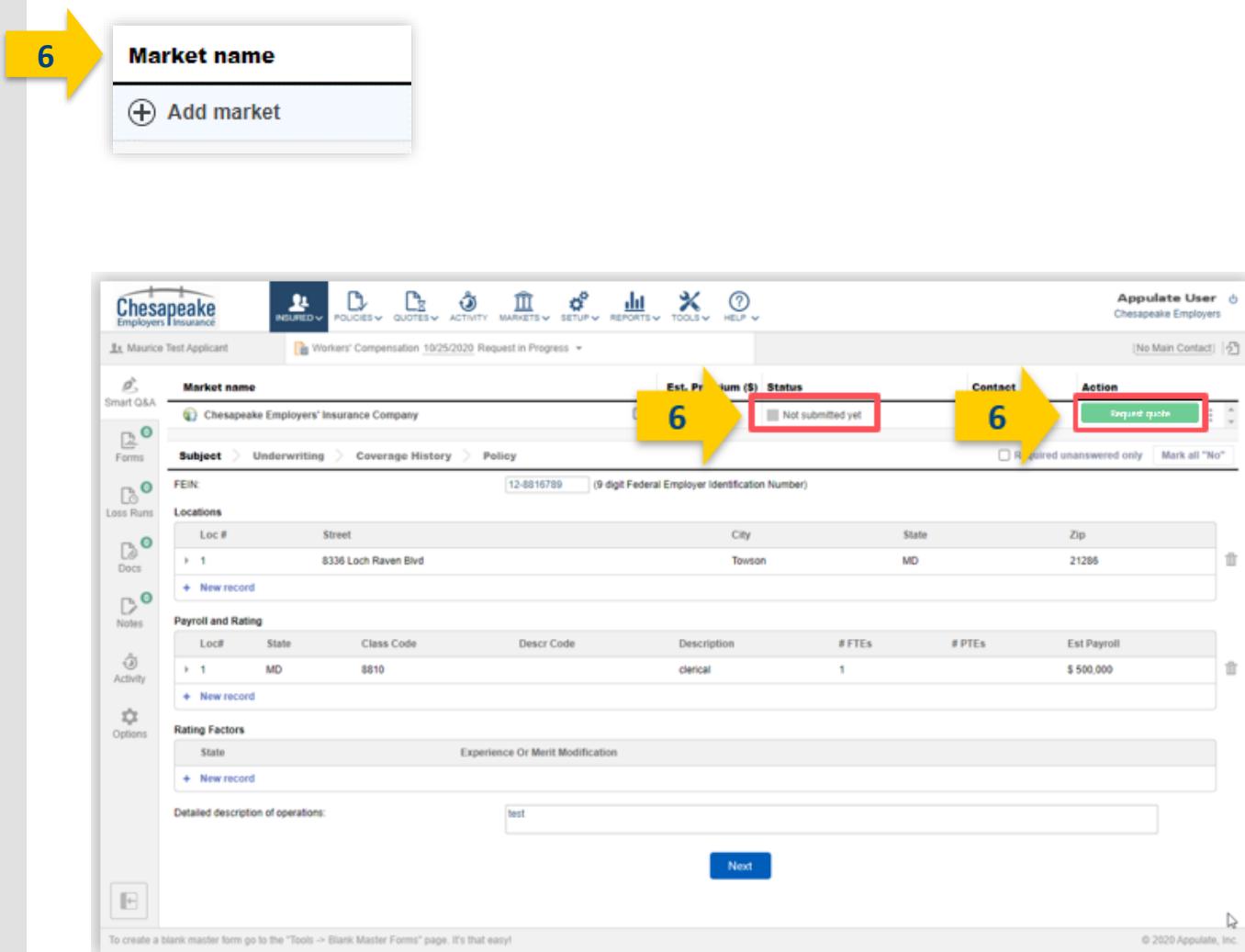
Note: Contact Appulate Support if you want Option 2 -- **Directly to Your Market(s)** turned on.

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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.



The screenshot shows the Appulate Uplink application interface. The top navigation bar includes 'INSURED', 'POLICIES', 'QUOTES', 'ACTIVITY', 'MARKETS', 'SETUP', 'REPORTS', 'TOOLS', and 'HELP'. The main area displays a quote for 'Maurice Test Applicant' under 'Workers' Compensation 10/25/2020 Request in Progress'. The quote details include:

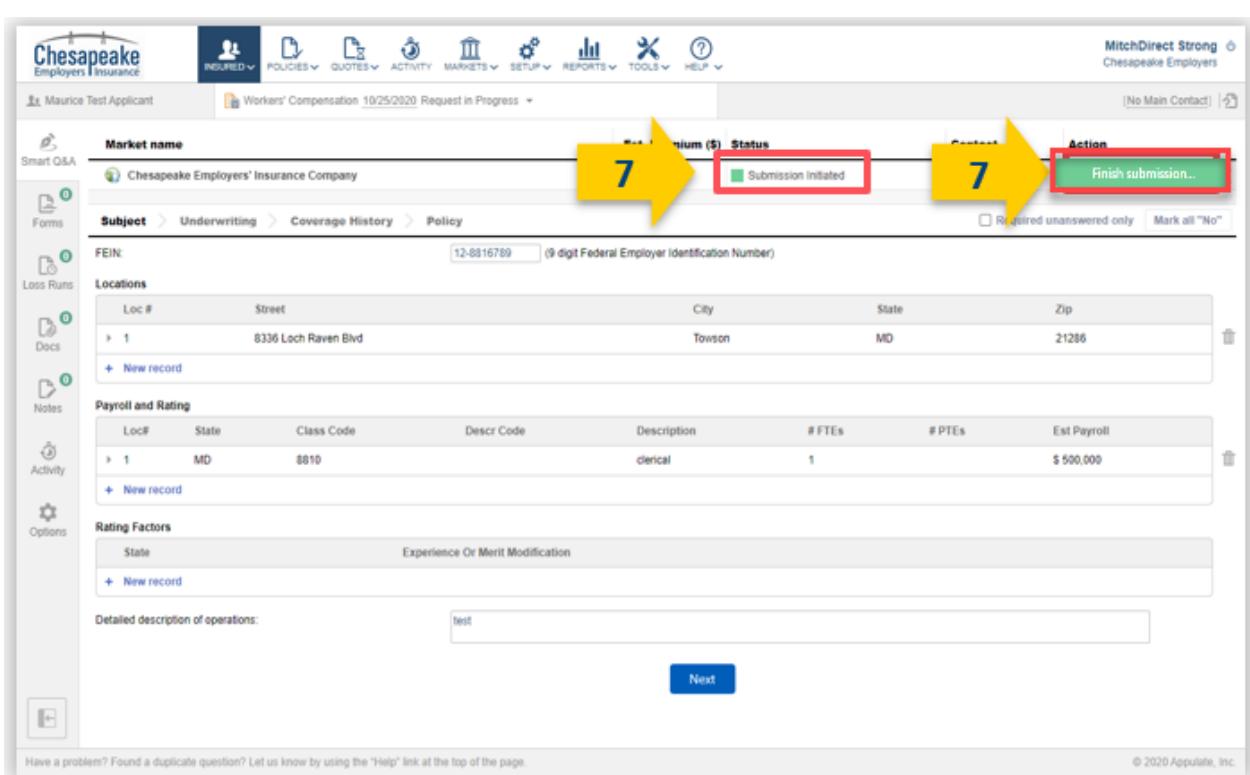
- Market name:** Chesapeake Employers' Insurance Company
- Subject:** Underwriting > Coverage History > Policy
- FEIN:** 12-8816789 (9 digit Federal Employer Identification Number)
- Locations:** 1 location listed: 8336 Loch Raven Blvd, Towson, MD, 21286
- Payroll and Rating:** 1 payroll record: MD, 8810, clerical, 1 FTE, \$ 500,000
- Rating Factors:** 1 rating factor: State, Experience Or Merit Modification
- Detailed description of operations:** test

The status bar at the bottom indicates: 'To create a blank master form go to the "Tools > Blank Master Forms" page. It's that easy!' and '© 2020 Appulate, Inc.'

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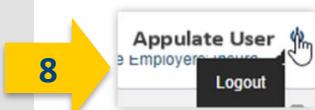
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7  The **Status** of the application will change to **Submission Initiated**, which indicates it should now be in eServices under your **Accounts**.
Once submitted, the **Action** will change to **Finish submission** and if you click on this button, 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 application interface. The top navigation bar includes links for Policies, Quotes, Activity, Markets, Setup, Reports, Tools, and Help. The user is logged in as 'Maurice Test Applicant' for a 'Workers' Compensation 10/25/2020 Request in Progress'. The main form is for a quote submission, with fields for Market name (Chesapeake Employers' Insurance Company), Subject (Underwriting), and Policy. The 'Status' field is highlighted with a red box and a yellow arrow labeled '7', showing 'Submission Initiated'. The 'Action' button is also highlighted with a red box and a yellow arrow labeled '7', showing 'Finish submission...'. The left sidebar contains links for Smart Q&A, Forms, Loss Runs, Docs, Notes, Activity, and Options. The bottom of the screen includes a help link and a copyright notice for 2020 Appulate, Inc.

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.

The screenshot shows the 'Document Markup' interface of Appulate. On the left is a scanned copy of a 'WORKERS COMPENSATION APPLICATION' form from ACORD. The form includes sections for 'AGENCY NAME & ADDRESS', 'INSURANCE CO.', 'POLICY INFORMATION', and 'CONTACT INFORMATION'. On the right, there are fields for 'Type' (set to 'ACORD'), 'File Name' (202008031432), 'ACORD #', 'Version', 'AMS', and 'Notes'. A yellow arrow labeled '9' points to the 'OCR' checkbox in the top left corner of the form.

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.

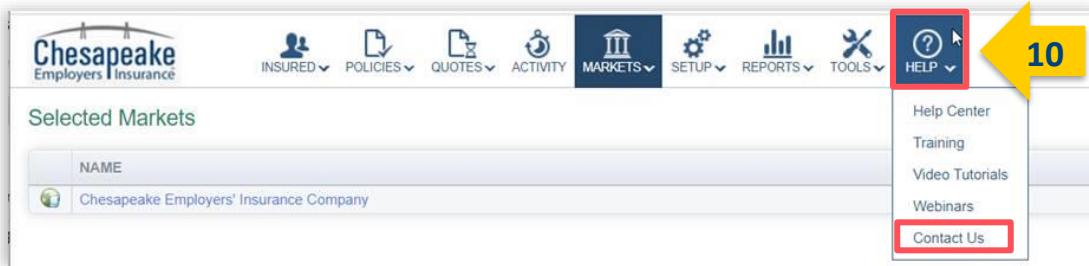
The uploaded ACORD application submitted through Appulate will go into eServices with a status of **Started**. Agents can delete the submission completely in eServices and resubmit from

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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.

► 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.