

# Agent Portal

Reference Guide | HOMEOWNERS



# Agent Portal

WebsiteAddress: <https://prod.missionselect.com/>



# Initial Log In

Four easy steps to set up your profile:

1

Prompt for Profile Set up

You are logged in as: **NANCY MARSHALL** | [Log Out](#) | [Edit Profile](#) | [Login Disclaimer...](#)

[Home](#) | [Search](#) | [Quotes](#) | [Policies](#) | [Help](#) | [Dashboard](#) | [Reports](#)

**News**

Looking to service a policy effective before 11/1/2019, OR Begins with KOP or PKC, [Please Login Here](#)

**New Quotes (within last 30 days)**

Agency Id	Named Insured	Quote
-----------	---------------	-------

**Alert:** Please change your password and select your password security questions.

[Continue](#)

2

Verify Identity

Profile Setup

[Verify Identity](#) > [Email Confirmation](#) > [Set Up Profile](#) > [Setup Confirmation](#)

Username: PAMDEMOUAT

Current Password:

[Continue](#)

3

Email Confirmation

Profile Setup

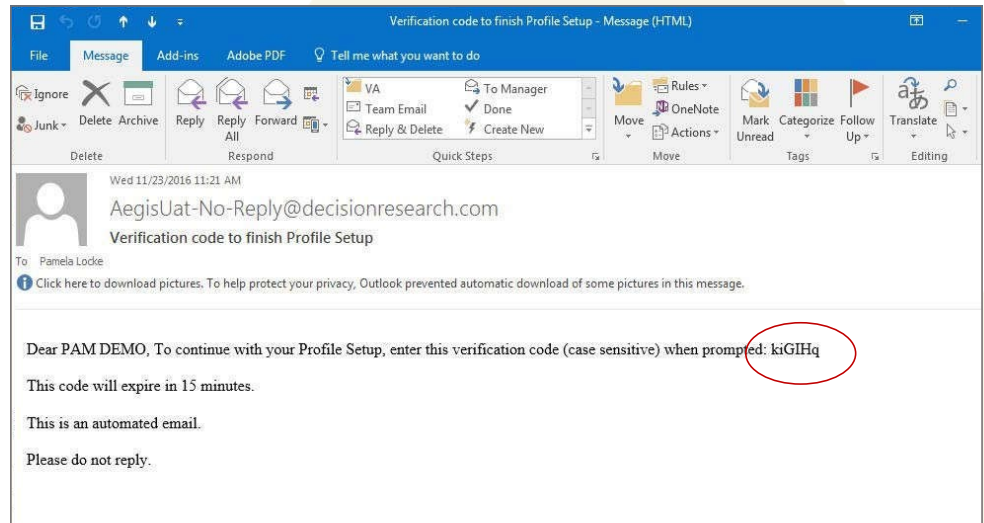
[Verify Identity](#) > [Email Confirmation](#) > [Set Up Profile](#) > [Setup Confirmation](#)

A verification code was sent to your email address. Please check your email and enter the code on the next page.

[Continue](#)

# Initial Log In (cont.)

Example of Email  
Verification Code



Profile Setup

Verify Identity > Email Confirmation > Set Up Profile > Setup Confirmation

Verification Code:

Security Question 1:

Security Answer 1:

Security Question 2:

Security Answer 2:

New Password:

Re-enter New Password:

Password must be at least 8 characters long and contain at least one number, one uppercase letter, one symbol !@#\$%^&\*(), three lowercase letters

Submit

4

Enter Verification Code, set  
up Security Questions, and  
create New Password

# Home Screen

1. Widgets provide information on recent activity.
2. Click and drag the boxes to display in different arrangements.
3. Minimize or maximize by clicking here.

NEW  
FEATURE

You are logged in as: **NANCY MARSHALL** | [Log Out](#) | [Edit Profile](#) | [Login Disclaimer...](#) | 10000389, MISSIONSELECT DEMO AGENCY, 6434 WESTWARD WOOD WAY, HUMBLE, TX 77338 | [Browser Compatibility Info](#)

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### News

Looking to service a policy effective before 11/1/2019, OR Begins with KOP or PKC, [Please Login Here](#)

### New Quotes (within last 30 days)

Agency Id	Named Insured	Quote	LOB	State	Status	Eff Date	Premium
-----------	---------------	-------	-----	-------	--------	----------	---------

Download info from widget to Excel by clicking here

Page 1 of 0 | Page size: 10 | No data to display

### New Policies (within last 30 days)

Agency Id	Named Insured	Policy	LOB	State	Status	Eff Date	Premium
-----------	---------------	--------	-----	-------	--------	----------	---------

Page 1 of 0 | Page size: 10 | No data to display

### Policies Pending Cancellation

Agency Id	Named Insured	Policy	LOB	State	Cancel Date	Status	Conv. Pol. No.
-----------	---------------	--------	-----	-------	-------------	--------	----------------

Page 1 of 0 | Page size: 10 | No data to display

### Policies Cancelled (within last 30 days)

Agency Id	Named Insured	Policy	LOB	State	Cancel Date	Reason	Conv. Pol. No.
10000389	TEST, TEXAS	0119804879	Homeowners	TX	9/21/2019	Cancellatio...	tdataconver...

Page 1 of 1 | Page size: 10 | Displaying 1 - 1 of 1

### Policies Pending MVR Review (Motorcycle Only)

⌵

### Upcoming Renewals

⌵

### Policies With Outstanding Suspense Letter or Action Requested Notice

⌵

### Policies With Claims (within last 12 months)

⌵

### Unpaid Mortgagee Policies

⌵

### Policies Renewed (within last 30 days)

⌵

### All Transactions (within last 30 days)

⌵

# Quote Screens

➤ Click “Quotes” tab from the home screen

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[Home](#) [Search](#) [Quotes](#) [Policies](#) [Help](#) [Dashboard](#) [Reports](#)

**News**  
Looking to service a policy effective before 11/1/2019, OR Begins with KOP or PKC, [Please Login Here](#)

**New Quotes (within last 30 days)**

Agency Id	Named Insured	Quote	LOB	State	Status
-----------	---------------	-------	-----	-------	--------

**New Policies (within last 30 days)**

Agency Id	Named Insured	Policy	LOB	State	Status
-----------	---------------	--------	-----	-------	--------

1. Enter Risk Zip Code
2. Select Line of Business
3. Click on New Quote

[Home](#) [Search](#) [Quotes](#) [Policies](#) [Help](#) [Dashboard](#) [Reports](#)

[Reload](#)

Zip Code:

Effective Date:

Line Of Business:

Expiration Date:

[New Quote](#)

Show  entries

Filter:

Number	Line Of Business	Status	Named Insured	Effective Periods	Premium	UW	State
Q8009320	Homeowners	Incomplete (New Quote)	ALAN, MS HO 94	7/30/2019 - 7/30/2020	\$978.00	AEGIS	TX

Showing 1 to 1 of 1 entries

[First](#) [Previous](#) [1](#) [Next](#) [Last](#)

# Quote Screens (Property Info)

## ➤ Enter Insured Information & Verify Risk Address

1. Property Address Information
2. Select Product – Premier HO-A+

Homeowners Quote

Property Info

### INSURED INFORMATION

Effective Date  Expiration Date

First Name

Middle Name

Last Name

Email

### PROPERTY ADDRESS

Street

Suite/Apt/Other

Zip/Postal Code  -

State/Province

City

County

Did you mean?

123 N MAIN ST  
HOUSTON TX 77002-1037

If you want to use your manually-entered address, click Continue.

### PROPERTY ADDRESS

Street

Suite/Apt/Other

Zip/Postal Code  -

State/Province

City

County

### PROPERTY INFORMATION

Product ☒ Premier HO-A+

Occupancy ☒ Primary ☐ Secondary



Continue



# Quote Screens (Dwelling Value)

Homeowners Quote

Property InfoDwelling Value

## PROPERTY INFORMATION

Territory	<input type="text" value="52"/>	
Dwelling Use	<input type="text" value="Stand-Alone Single Family"/>	
Year Built	<input type="text" value="2015"/>	
Construction Type	<input type="text" value="Brick Veneer/Hardie"/>	
Roof Covering	<input type="text" value="Asphalt/Composition"/>	
Square Footage	<input type="text" value="2015"/>	
What year was the roof last replaced?	<input type="text" value="2015"/>	
Number of Stories	<input type="text" value="1"/>	
Number of Corners	<input type="text" value="4"/>	
Foundation	<input type="text" value="Slab"/>	
Paid Fire Department less than 5 miles?	<input checked="" type="radio"/> Yes <input type="radio"/> No	
Fire Hydrant less than 1,000 feet?	<input checked="" type="radio"/> Yes <input type="radio"/> No	
Fire Extinguishers located in the dwelling?	<input checked="" type="radio"/> Yes <input type="radio"/> No	

1. Complete 'Property Information'

2. Click 'Continue' (located at the bottom of the screen)

Total square feet of living area.

NEW FEATURE

Save for Later

Continue



# Quote Screens (Discount & Charge Verification)

1. Select Discounts & Surcharges
2. Click 'Continue'

**Homeowners Quote**

**Property Info** **Dwelling Value** **Discount & Charge Verification**

## DISCOUNT AND SURCHARGES

Number of permanent residents?	<input type="text" value="1"/>	
Are all water heaters and washing machines located on the ground floor?	<input checked="" type="radio"/> Yes <input type="radio"/> No	
Swimming Pool/Spa?	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Monitored Alarms?	<input type="text" value="None"/>	
Number of mortgagees	<input type="text" value="1"/>	
Loan Year	<input type="text" value="2015"/>	
Companion Policy?	<input checked="" type="radio"/> Yes <input type="radio"/> No	
Is the home in a gated community?	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Prior Coverage or New Purchase?	<input checked="" type="radio"/> Yes <input type="radio"/> No	
Are there any chargeable Losses on Property to be insured within the last 3 years?	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Number of losses at current or prior location within last 3 years?	<input type="text" value="0"/>	
MS HO 811 Specified Building Exclusion	<input type="radio"/> Yes <input checked="" type="radio"/> No	

# Quote Screens (Coverage Limits)

Homeowners Quote

Property Info > Dwelling Value > Discount & Charge Verification > Coverage

## COVERAGE LIMITS

Coverage A - Dwelling	<input type="text" value="\$200,000"/>	
Coverage Other Structures	<input type="text" value="10%"/>	
Coverage B - Personal Property	<input type="text" value="40%"/>	
Coverage Loss of Use	<input type="text" value="10%"/>	
Coverage C - Personal Liability	<input type="text" value="\$25,000"/>	
Coverage D - Medical Payments	<input type="text" value="\$500"/>	
Clause 1 - Windstorm, Hurricane or Hail	<input type="text" value="2%"/>	
Clause 2 - All Other Perils	<input type="text" value="2%"/>	
MS HO 90 Additional Perils with Ltd Water	<input type="text" value="\$1,500 (included)"/>	

1. Select Coverages
2. Additional Limits available in drop downs.
3. Click 'Continue'

MS HO 50 Dog Liability Endorsement	<input checked="" type="radio"/> Yes <input type="radio"/> No
HO-105 Residence Glass Coverage	<input type="radio"/> Yes <input checked="" type="radio"/> No
HO-110 Increased Limit on Jewelry, Watches and Furs	<input type="text" value="Not Selected"/>
HO-160 Scheduled Personal Property	<input type="radio"/> Yes <input checked="" type="radio"/> No
HO-225 Additional Premises Liability	<input type="text" value="Not Selected"/>
HO-301 Additional Insured	<input type="radio"/> Yes <input checked="" type="radio"/> No
MS HO 101 Replacement of Personal Property	<input type="text" value="Included"/>

# Quote Screens (Premium)

Homeowners Quote

Property Info

Dwelling Value

Discount & Charge Verification

Coverage

Premium

THANK YOU FOR YOUR BUSINESS! HERE ARE THE DETAILS OF YOUR QUICK QUOTE.

Print Quote

Total Amount Due: \$706.00

Quote Effective Date: 10/21/2019 - 10/21/2020

The insurance afforded is only with respect to the following coverage as are indicated by specific premium charges. The limit of the company's liability against each such coverage shall be as stated herein, subject to all of the terms of this policy.

Product: Premier HO-A+  
Program Tier: Preferred

BASIC COVERAGES	Limit / Selection	Premium
Coverage A - Dwelling	\$200,000	\$2,802.00
Coverage Other Structures	\$20,000	Included
Coverage B - Personal Property	\$80,000	Included
Coverage Loss of Use	\$20,000	Included
Coverage C - Personal Liability	\$25,000	Included
Coverage D - Medical Payments to Others	\$500	Included

1. Completion of Quote
2. Confirm rate and 'Print Quote'

TOTAL PREMIUM	\$586.00
POLICY FEE	\$70.00
CATASTROPHE FEE	\$50.00
TOTAL ANNUAL PREMIUM AND FEE	\$706.00

**\*\*This is a quote only and coverage is not bound unless the risk meets the underwriting guidelines and payment is received. Based on the underwriting guidelines, the premium and/or coverage(s) could change.**

Save for Later

Review Bill Options

# Quote Screens (Pay Plan Options)

Pay Plan Options for Current and Renewal Policy

Enroll in Auto Pay

NEW  
FEATURE

Homeowners Quote

Property Info > Dwelling Value > Discount & Charge Verification > Coverage > Premium > Pay Plan Options

### CURRENT BILL OPTIONS

Current Plan Option:

### BILL OPTIONS AT RENEWAL

Renewal Plan Option:

Total Premium and Fees: \$706.00

Enroll in Auto Pay? ☐ ⓘ

Installments	Due Date	Installment Fee	Premium Amount	Installment Amount Due
1	10/21/2019	\$0.00	\$266.50	\$266.50
2	12/20/2019	\$7.00	\$146.50	\$153.50
3	02/18/2020	\$7.00	\$146.50	\$153.50
4	04/18/2020	\$7.00	\$146.50	\$153.50

Save for Later Continue to Application

Click 'Continue to Application'

# Application Screens (Property Info)

Homeowners Quote

Property Info

### INSURED INFORMATION

Effective Date	<input type="text" value="06/15/2020"/>	Expiration Date	<input type="text" value="06/15/2021"/>
First Name	<input type="text" value="JOHN"/>		
Middle Name	<input type="text"/>		
Last Name	<input type="text" value="SMITH"/>		
Home Phone	<input type="text" value="(222) 222-2222"/>	Cell Phone	<input type="text"/>
Email	<input type="text"/>		

- Insured Information
- Verify Policy Effective Date
- One phone number is required

- Mailing Address if different from Risk
- Add Second Named Insured
- Click 'Continue'

### PROPERTY ADDRESS

Street	<input type="text" value="123 N MAIN ST"/>
Suite/Apt/Other	<input type="text"/>
Zip/Postal Code	<input type="text" value="77002"/> - <input type="text" value="1037"/>
State/Province	<input type="text" value="TX"/>
City	<input type="text" value="HOUSTON"/>
County	<input type="text" value="HARRIS"/>
Is the mailing address the same as the property address?	<input checked="" type="radio"/> Yes <input type="radio"/> No

### MAILING ADDRESS

Country	<input type="text" value="United States Of America"/>
Street	<input type="text" value="PO BOX 7729"/>
Suite/Apt/Other	<input type="text"/>
Zip/Postal Code	<input type="text" value="45501"/> - <input type="text" value="7729"/>
State/Province	<input type="text" value="OH"/>
City	<input type="text" value="SPRINGFIELD"/>

### SECOND NAMED INSURED

Second Named Insured?	<input checked="" type="radio"/> Yes <input type="radio"/> No				
First Name	<input type="text" value="JANE"/>	Middle Name	<input type="text"/>	Last Name	<input type="text" value="SMITH"/>

# Application Screens (Verify or Make Changes)

Homeowners Quote

Property Info Dwelling Value

## PROPERTY INFORMATION

Territory

Dwelling Use

Year Built

Construction Type

Roof Covering

Square Footage

What year was the roof last replaced?

Number of Stories

Number of Corners

Foundation

Fire Department

Superior Protection

Paid Fire Department less than 5 miles?

Fire Hydrant less than 1,000 feet?

Fire Extinguishers located in the dwelling?

Homeowners Quote

Property Info Dwelling Value Discount & Charge Verification

## DISCOUNT AND SURCHARGES

Number of permanent residents?

Are all water heaters and washing machines located on the ground floor?

Swimming Pool/Spa?

Monitored Alarms?

Number of mortgagees

Loan Year

Companion Policy?

Is the home in a gated community?

Prior Coverage or New Purchase?

Are there any chargeable Losses on Property to insured within the last 3 years?

Number of losses at current or prior location within last 3 years?

MS HO 811 Specified Building Exclusion

Homeowners Quote

Property Info Dwelling Value Discount & Charge Verification Coverage

## COVERAGE LIMITS

Coverage A - Dwelling	<input type="text" value="\$200,000"/>	
Coverage Other Structures	<input type="text" value="10%"/>	
Coverage B - Personal Property	<input type="text" value="40%"/>	
Coverage Loss of Use	<input type="text" value="10%"/>	
Coverage C - Personal Liability	<input type="text" value="\$25,000"/>	
Coverage D - Medical Payments	<input type="text" value="\$500"/>	
Clause 1 - Windstorm, Hurricane or Hail	<input type="text" value="2%"/>	
Clause 2 - All Other Perils	<input type="text" value="2%"/>	
MS HO 90 Additional Perils with Ltd Water	<input type="text" value="\$1,500 (included)"/>	
MS HO 50 Dog Liability Endorsement	<input checked="" type="radio"/> Yes <input type="radio"/> No	
HO-105 Residence Glass Coverage	<input type="radio"/> Yes <input checked="" type="radio"/> No	
HO-110 Increased Limit on Jewelry, Watches and Furs	<input type="text" value="Not Selected"/>	
HO-160 Scheduled Personal Property	<input type="radio"/> Yes <input checked="" type="radio"/> No	
HO-225 Additional Premises Liability	<input type="text" value="Not Selected"/>	
HO-301 Additional Insured	<input type="radio"/> Yes <input checked="" type="radio"/> No	
MS HO 101 Replacement of Personal Property	<input type="text" value="Included"/>	

# Application Screens (Questionnaire)

1. Answer Underwriting Questions
2. Click 'Continue'

## Homeowners Quote

Property InfoDwelling ValueDiscount & Charge VerificationCoverageQuestionnaire

### QUESTIONNAIRE

Does roof have any existing damage and/or excessive granule loss? ☒ Yes ☐ No

Are the premises well maintained? ☐ Yes ☐ No

Does the roof have an overlay? ☐ Yes ☐ No

Does the Dwelling or Other Structures have any existing damage? ☐ Yes ☐ No

Are any Other Structures greater than 200 square feet metal construction? ☐ Yes ☐ No

Do any detached buildings greater than 1100 square feet have a metal roof? ☐ Yes ☐ No

Applicant previously cancelled for underwriting reasons? ☐ Yes ☐ No

Applicant ever convicted of insurance fraud or arson? ☐ Yes ☐ No

Save for LaterContinue



# Application Screens (Interested Parties)

Add Interested Parties if applicable

Homeowners Quote

Property Info > Dwelling Value > Discount & Charge Verification > Coverage > Questionnaire > Interested Parties

**ADDITIONAL INSURED**

Create New Additional Insured

**MORTGAGEE**

Create New Mortgagee

Create Mortgagee

**MORTGAGEE**

Mortgage Type

Loan Number

Mortgagee

Street

Suite/Apt/Other

Zip/Postal Code  -

State/Province

City

Bill To ☐ Yes ☒ No

Cancel Save

If this is going to be Escrow Bill, you need to indicate which mortgagee to bill.

Be sure to 'Save'

# Application Screens (Loss History)

Add Loss History if applicable

Homeowners Quote

Property Info > Dwelling Value > Discount & Charge Verification > Coverage > Questionnaire > Interested Parties > Loss History

Please enter the loss(es) indicated on the Discount and Charge Verification tab.

## LOSS HISTORY

Loss Date

Carrier

Policy Type

Cause of Loss

Location

Status

Loss Amount

Be sure  
to 'Save'

# Application Screens (Loss History)

## Homeowners Quote

[Property Info](#)[Dwelling Value](#)[Discount & Charge Verification](#)[Coverage](#)[Questionnaire](#)[Interested Parties](#)[Loss History](#)[Premium](#)[Purchase](#)

THANK YOU FOR YOUR BUSINESS! HERE ARE THE DETAILS OF YOUR QUICK QUOTE.

[Print Quote](#)

### Total Amount Due: \$679.00

Quote Effective Date: 06/14/2020 - 06/14/2021

The insurance afforded is only with respect to the following coverage as are indicated by specific premium charges. The limit of the company's liability against each such coverage shall be as stated herein, subject to all of the terms of this policy.

**Product: Premier HO-A+**  
**Program Tier: Standard**

BASIC COVERAGES	Limit / Selection	Premium
Coverage A - Dwelling	\$200,000	\$1,459.00

TOTAL PREMIUM	\$586.00
POLICY FEE	\$70.00
CATASTROPHE FEE	\$50.00
TOTAL ANNUAL PREMIUM AND FEE	\$706.00

\*\*This is a quote only and coverage is not bound unless the risk meets the underwriting guidelines and payment is received. Based on the underwriting guidelines, the premium and/or coverage(s) could change.

[Save for Later](#)[Review Bill Options](#)

1. Completion of Quote
2. Confirm rate and 'Print Quote'

# Payment/Purchase Screen

Homeowners Quote

Property Info > Dwelling Value > Discount & Charge Verification > Coverage > Questionnaire > Interested Parties > Loss History > Premium > Purchase

**CURRENT BILL OPTIONS** **BILL OPTIONS AT RENEWAL**

Current Plan Option: 1-Pay Renewal Plan Option: 1-Pay

Total Premium and Fees: \$706.00 Enroll in Auto Pay? ☐

Installments	Due Date	Installment Fee	Premium Amount	Installment Amount Due
1	06/15/2020	\$0.00	\$706.00	\$706.00

Save for Later Continue

1. Confirm Payment Options
2. Complete Payment Information
3. Auto Pay - NEW

NEW  
FEATURE

Payment Due at Time of Issuance

NEW  
FEATURE

**MINIMUM PAYMENT DUE AT THIS TIME: \$706.00**  
(Total Amount for Policy: \$706.00)

Minimum Payment: \$706.00

Payment Amount:

Payment Method:

- ☐ Credit or Debit Card
- ☐ eCheck(EFT)
- ☒ Agency EFT

Enroll in Auto Pay? ☐

Save for Later

Pay Now

# Payment Screens (Thank You)

1. Obtain Policy Number
2. Continue to Documents

Your policy number is: 0119824954

**Thank you!**

Your policy number is **0119824954**  
and your policy has been saved.

[Continue to Documents](#)

**Policy term: 6/15/2020 - 6/15/2021.**

In the coming weeks, an exterior inspection of the risk address will be conducted by an independent inspector. The inspection does not require an appointment. Note: Refusal of the inspection may result in the cancellation of the insurance policy.

Amount Paid
<b>\$706.00</b>

# Payment Screens (Documents)

1. Click 'Documents' Tab for Application and Declarations and Policy docs
2. Open Documents by clicking on the hyperlink
3. Review the Insured, Policy, and Payment info

Homeowners Policy

Summary Insured Payments **Documents**

Upload Documents

Search:

Document	Description	Category	Date Created
<a href="#">MSELECT-POS-NO CERT-20200614-0119824947.pdf</a>	Point of Sale	Application	10/21/2019 13:51:05
<a href="#">MSELECT-DEC-DEC PAGE-NO CERT-20200614-0119824947.pdf</a>	DEC	Declaration - New Policy	10/21/2019 13:51:04
<a href="#">Payment-0119824947.pdf</a>	Payment Receipt	Correspondence	10/21/2019 13:50:55

# Summary of New Features



## 1. Agency Help:

- Home Page Widgets
- Data download to Excel
- Address verification
- Help Information bubbles

## 2. Payment Features:

- EFT – Auto Pay
- Payment Due at policy issuance

## 3. Issued Policy Capabilities:

- Declarations Page view/print

## CONTACT INFORMATION:

Underwriting Email: [Underwriting@missionselect.com](mailto:Underwriting@missionselect.com)

Phone: 800-780-6941



# *Thank You*



Mission**Select**  
Insurance