APPULATE
Start Saving Keystrokes

Appulate Handbook
for
State Fund First
Agents

Table of Contents

What is Appulate?

Appulate is a technology company that only serves the insurance industry. Appulate's Full Submission Management Suite is designed to drive greater efficiencies and effectiveness into your marketing process. As an add-on to your current agency management system, Appulate eases data collection, streamlines the marketing process and removes tedious data entry to help agents maximize profits.

In short, Appulate saves you time in your marketing and submission process by eliminating multiple data entry.

Here are some of our highlights:

• Uplink- bridge your ACORDs from your management system to Appulate
• Real-time Work Comp Rater- gives instant premium indications for California markets
• Submit ACORD data electronically to your carrier websites for quoting
• Forms Filler- consolidate ACORDs and supplementals into one master questionnaire to eliminate double entry
• LossRunner- request loss runs with ease! For prospects, using electronic signature
• Electronically sign ACORDs and supplementals- for agent and insured
• Web Based- won't take up room on your computer
• Works with your agency management system

To sign up or find out more about licensing Appulate's Full Submission Management Suite, contact sales@appulate.com.

Appulate and State Fund First- Free Electronic Submissions

Appulate is a technology company that created and supports the portal to your market, State Fund First. Along with your appointment to State Fund First comes free access to submit to State Fund First electronically using Appulate! This will save you time by eliminating multiple entry of ACORD data. With Appulate, you can simply bridge ACORD data over to the State Fund First Portal, using Uplink.

Setup

1. **Create an Appulate Account**
   -Once you have created an appointment directly with State Fund First, you can then create an Appulate account. To do so go to, sff.appulate.com. On the login page, click on "Not a user? Sign up!". On the next page, click on "Let's Begin!" and answer all of the required questions for steps 1-4.

2. **Download Uplink**
   -Every user will download Uplink onto their computer if they want to use upload ACORD data onto the portal.
   -The Uplink download is located under the Tools icon in your Appulate account.
   -Check out the "How to Install Uplink" section of this handbook for additional download information
   #InstallUplink

3. **Add users**
   - Your Appulate account admin can add a user to the account by going to the "Setup" icon in Appulate, click on "Users", then "Add New User".

      *Note- all user information can also be edited and users can be deactivated in the same section, under "Setup" and "Users".

Uplink

What is Uplink?

Appulate Uplink™ is the easiest and most comprehensive ACORD XML data bridge for "Upload" on the market today. This virtual print driver installs on your desktop, allowing you to "print" forms from your agency management system. Uplink™ automatically converts the forms into ACORD XML and pushes the data onto Appulate so it can plug that data onto your carrier custom supplementals, a loss run request template, and onto your market websites for quoting.

What makes Uplink™ unique and powerful is that it is the only upload solution that works with any agency management system on the market.

How to Install Uplink

- ✓ Log in to your Appulate account
- ✓ Go to the "Tools" icon at the top of the page
- ✓ Click on "Download Uplink"
- ✓ Select your management system from the dropdown (if it isn't on the list choose other), then click on the download link
- ✓ Hit "Run" then follow the prompts

Once it is installed you will find the Appulate Uplink listed as one of your printer options.

System Requirements for Uplink

You must use Internet Explorer as your browser, version 8 or higher, for Uplink to work.

How to use Uplink Starting from your Management System

Step 1   Find the ACORD that is filled out and ready to go into Appulate, and 'print' it to the "Appulate Uplink" printer.
Step 2   Enter your Appulate credentials, in the dialog box that pops up and hit "Send".

Then it will open up Appulate in your browser window (you don't have to have Appulate or even Internet Explorer open, it will open the window regardless) and automatically create a customer file and policy for you in Appulate, and take you to the "Marketing" or "Prequalification" section in Appulate (which is where all of our main features live). Once you Uplink, all of your ACORD data is bridged over onto Appulate.

*Note- you only have to enter your credentials in the dialog box once, the next time you Uplink, it will already have your credentials entered so you just have to hit "Send". Don't forget that if you change your Appulate Credentials, you will have to update it in the dialog box the next time you Uplink.

Once you create a customer file and policy type (i.e. Work Comp), if you want to add another policy type (i.e. GL), you can go back into your management system and bridge over the ACORD for the next policy type that you want to work on.
i.e. if you bridged over an ACORD for Work Comp and now want to work on GL, go back into your management system and bridge over the GL ACORD.

*Note- if you are bridging over a Package policy, don't bridge over each ACORD one-by-one as described above. Print all of the ACORD forms that belong in the package policy as one, then Appulate will know you are creating a Package policy and not individual polices.

How to use Uplink Starting from Outlook

Step 1   Find the email with the attachment of the ACORD and right click on the attachment, then click on the "Uplink" option.

Step 2   Enter your Appulate credentials, in the dialog box that pops up and hit "Send".

Then it will open up Appulate on your browser and it will automatically create a customer file and policy for you in Appulate, and take you to the "Marketing" or "Prequalification" section in Appulate (which is where all of our main features live). Once you Uplink, all of your ACORD data is bridged over onto Appulate.

*Note- you only have to enter your credentials in the dialog box once, the next time you Uplink, it will already have your credentials entered so you just have to hit "Send". Don't forget that if you change your Appulate Credentials, you will have to update it in the dialog box the next time you Uplink.

How to Add a New Insured

Starting from Appulate

Step 1   Login to Appulate and the first page that it takes you to is called "Insured", "All" (where is lists all of your customers).
    *Note- If you aren't on that page you can get to it by going to the "Insured" icon at the very top of the page and clicking on "All".

Step 2   Once there, you will see a blue button on the top left that says "Add New", click on that.

Step 3   Enter all of the insured's basic information that it asks you for under the "Main Information" section and hit "Continue".

Step 4   Enter all of the Policy information that it asks you for under "Summary" then hit "Continue".

Then you will be in the "Marketing" or "Prequalification" section, where all of our main features live. Use the rest of this handbook to help you with whatever you would like to do next.

Starting with Uplink

How to use Uplink Starting from your Management System

Step 1   Find the ACORD that is filled out and ready to go in your management system and 'print' it to the "Appulate Uplink" printer.

Step 2   Enter your Appulate credentials, in the dialog box that pops up and hit "Send".

Then it will open up Appulate on your browser and it will automatically create a customer file and policy for you in Appulate, and take you to the "Marketing" or "Prequalification" section in Appulate (which is where all of our main features live). Once you Uplink, all of your ACORD data is bridged over onto Appulate.

*Note- you only have to enter your credentials in the dialog box once, the next time you Uplink, it will already have your credentials entered so you just have to hit "Send". Don't forget that if you change your Appulate Credentials, you will have to update it in the dialog box the next time you Uplink.

How to fill out the Questionnaire

Before you can submit to State Fund First, you must answer all required questions under the "Marketing" or "Prequalification" section in the Questionnaire tab. Required questions have red stars next to them. Once you are done with a section, click the "Continue" button to work through the entire questionnaire. It won't let you move past a section unless you have answered all of the required questions in that section.

Answering Questions in Tables

Some questions are in a table, to answer those you must click "Add New" to add a line, click on the edit icon to make changes or answer additional questions in an existing line, and the delete icon if you would like to delete an entire line. Once you are done answering all of the required questions in a section, hit the "Continue" button to keep moving forward.

Letter Indication

Hover over the colored letter indication that appears next to the markets name, it will tell you what questions need to be answered and what documents need to be attached before you can hit the submit button. Use it to help guide you through the submission.

How to Attach Loss Runs

Once you have answered all of the questions, it may ask you to attach additional documents.

In the "Marketing" or "Prequalification" section, click on the "Loss Runs" tab. If the Insurance History section on your ACORD form was filled out, when you bridged over your ACORD form using Uplink, it will automatically plug the carriers names, policy numbers and years into Appulate's "Loss Runs" tab. If not, you can click on "Edit Insurance History" at the bottom of the "Loss Runs" page and manually input this information.

*Note- If we don't recognize the market, the market's name will show up in red and you won't be able to move forward. To correct it, click on the markets name and start to backspace or type in more of the name, then options from our database will start to pop up. Chose the correct one, and then continue on.

This short video shows how this is done: http://www.youtube.com/watch?v=nddZbgJvqYM

Once the insurance history information has been entered in the loss runs tab, you will be able to click on the paperclip icon that appears on the far right. When you click on that icon, it will allow you to browse your computer to find and attach loss runs.

Attaching additional documents

If the letter indication next to your market is asking you to attach any additional document, go to the "Other Documents" tab next to the "Loss Runs" tab.

Submissions & Submission Designation

Once all required questions have been answered and all additional documents required have been attached, you will be able to hit the submit button on the same line as the market under "Action". Once you hit the submit button it will ask you to choose an underwriter from the dropdown menu. If you don't know who your underwriter is, choose "HQ" and they will sort it out.

Once you hit submit, it is "business as usual" with that market. They will communicate with you in regards to the quote, just as they normally would. If you have any questions about the policy, contact your underwriter directly.

Renewals
Renewals are very easy with Appulate. All of your information is stored in Appulate, once renewals come along, you just have to add in the new year's information make a few edits but you will never have to start from scratch!

How to Use it

There are 3 ways you can renew a policy in Appulate to remarket an account:

1. You can start in your management system and bridge over the updated ACORD form. As long as it has the same exact customer name in Appulate as is on the ACORD, then Appulate will recognize it is the same customer and will update the file accordingly, adding a new year to the file.

2. You can click on "Renew" in the "Summary" section in Appulate (which is right next to the "Marketing" or "Prequalification" section. It will then update the file accordingly, adding a new year to the file.

3. You can set the file to "Auto-Renew" in the "Summary" section in Appulate (which is right next to the "Marketing" or "Prequalification" section and 90 days out, it will automatically renew the file updating it accordingly by adding a new year to the file

*Note- once your policy is auto-renewed in Appulate, it has renewed your file for this customer in Appulate so that you can remarket it if you wish. It has not gone out to market, you must hit "Submit" again when you are ready.

Visual Aide

Adding a new Insured

Questionnaire Tab

Where all required questions must be answered.

Letter Indication

Hover over the letter and it will tell you what is missing.

Loss Runs Tab
Attaching Loss Runs

Submit

Help

If you need help navigating through the Appulate system or working through the submission process, you can contact Appulate at support@appulate.com.

If you have any questions regarding your policy, how to answer a particular question, commissions, turnaround time, and any other policy related matters, please contact your State Fund First rep directly. If you don't know who you rep is, general contact information for State Fund First can be found on their website, statefundfirst.com/contact.