# Submission Process Instructions
## (The Appulate System)

These instructions are for agents already registered with Appulate. If you are not registered, see our Appulate – Agent Setup Instructions or go to http://www.statefundfirst.com/#submissions and click on the Login/Register" button towards the top right of the page.

**To view instructions on how upload into the Appulate system, follow the instructions below.**

**To key in submission information directly**, see our Appulate – Submission Instructions – SFF Agent - Manual.

**Before you begin, you will need to have the Appulate Uplink downloaded onto your computer. For instructions on how to do that, go to page 9 of these instructions. If you have already downloaded the Uplink tool, begin here at 1.**

1. Prepare a completed Acord application to print from either your agency management system or from a PDF document. Choose the "Appulate Uplink" option from your list of printers. For Pages to Print, choose pages 1-4 (it will only carry over the first 4 pages of the Acord app).
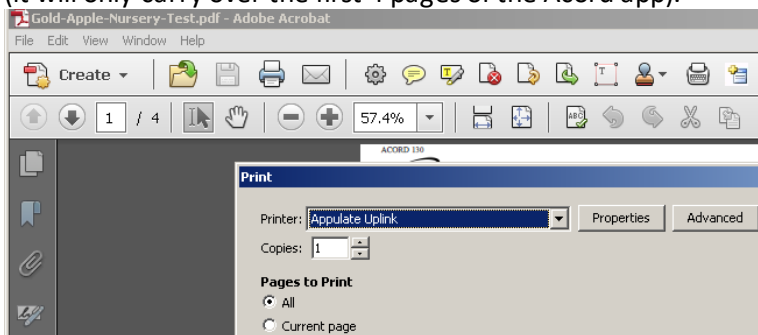


2. Click "Print". This will bring you to the Appulate Uplink Log-in screen. Enter your Appulate email and password and select "Send". Once you have entered your password once, the next time you use Uplink you can simply select "Send".
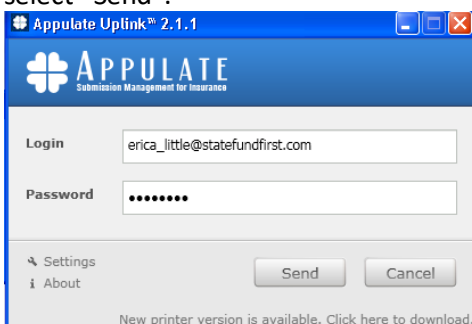


3. Appulate was designed and performs best on Google Chrome. You may click on Settings to make sure your default browser is not set to Internet Explorer. Click save if you make changes or cancel to return

to the previous screen. As long as your computer's default browser is set to Google Chrome, the submission will transfer correctly.
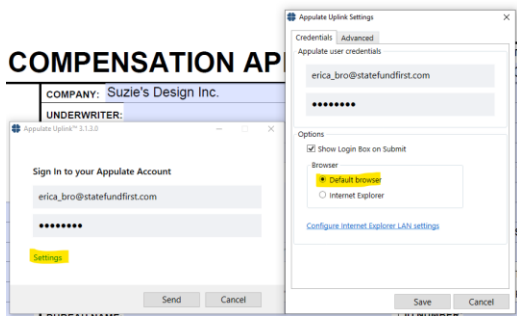


4. Click Send after entering your login details and the system will begin to transfer the data from the Acord application
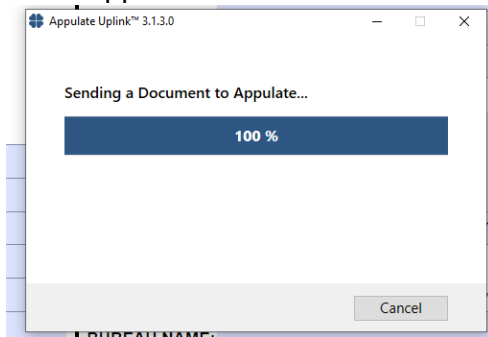


5. The information from your Acord application will be pre-populated into the StateFund First submission portal. You will see the following screen. You will choose create new insured and click continue. (You will only use "update existing" if this is a submission that has been entered in Appulate before (resubmit).
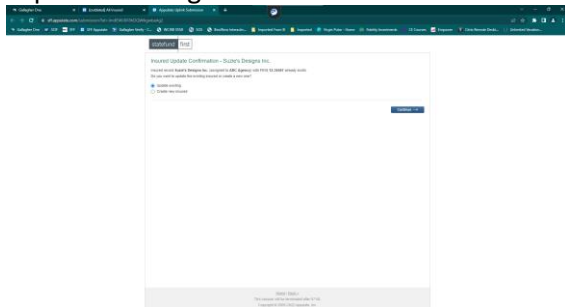


6. Click on "Add Markets" and select State Fund of California. If you think the client may qualify for the other markets, you may select them as well. (*Note: selecting multiple markets will require more questions to be answered. Each market has their own set of questions.)
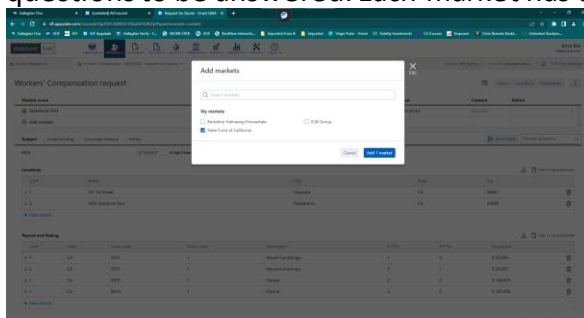
7. Click "Request Quote" to begin. The system will show a series of required items (noted by red*) that need to be completed per section, to move through the submission.



8. You will complete the 4 sections (Subject, Underwriting, Coverage History, & Policy). Enter the general information into the fields shown in the Subject section.  Tab to move between fields.



9. To add more locations, enter payroll and rating information, click on the blue "New Record" to open that area. This will display additional fields to complete.



10. Once you have completed entering information, select Tab to get to the next section to enter the payroll and rating.

System has a built in classification finder connected to the WCIRB to input the correct class code. Enter class code, # of both FT and PT employees (even if its 0), and the annual payroll. Click Next, once you have answered all questions marked with a *RED Asterisk.





11. Answer the questions in the Underwriting section, click Next to move to the Coverage History section. *Rate may differ based on the client response to the Employee questions, if they have been operating without coverage.*.



12. Complete Coverage history and attach Loss Runs for employers with prior WC history for the past 4 years (Loss Runs Tab shows on the left panel). If they have not had coverage for any years during the past 4, please indicate a reason for no coverage for that year(s). Enter details for payroll history, Click Next to move to the final section, Policy.

13. Complete Policy Section by filling in the Insured, Contact and Policy Info sections.



14. Click on the drop down arrow, to open fields to enter data. Click "Add New" to create.



15. For a Corp, Contact Info should reflect a primary person of Contact along with the 3 titles needed for a Corp (Pres, Sec & Treasurer). Complete the Policy Info section based on the correct titles for each entity. *Titles may vary* Refer to Ownership Info from the Secretary of State. When you have completed the Insured Info, move to Contact Info and complete the info. Then move to the Policy Info.

16. Enter in the location from the options in the drop down menu. Select include or exclude, ownership % (totaling 100%) and answer the two questions about the payroll in the Policy Info section to complete it.



17. All Info has been completed and there are no red asterisks. Now you may click Request for Quote to submit. The below page will populate, Click Show Required Questions only. Answer the questions.*If your client does need to answer specific questions related to that submission, please answer accordingly. Specialty Quotes will be reviewed by an underwriter after submitting and all accounts over $25K.*(Specialty supplemental are on our website https://www.statefundfirst.com/submit-business/)



18. The questions below will appear, please respond. The estimated premium will show to you, Click Request Quote to proceed. It will then show it was submitted to us for review.
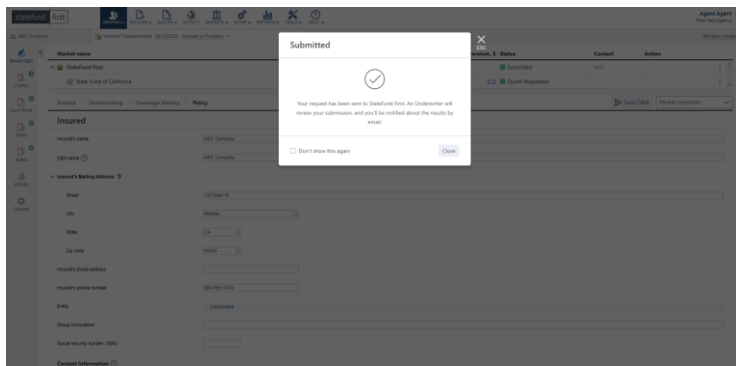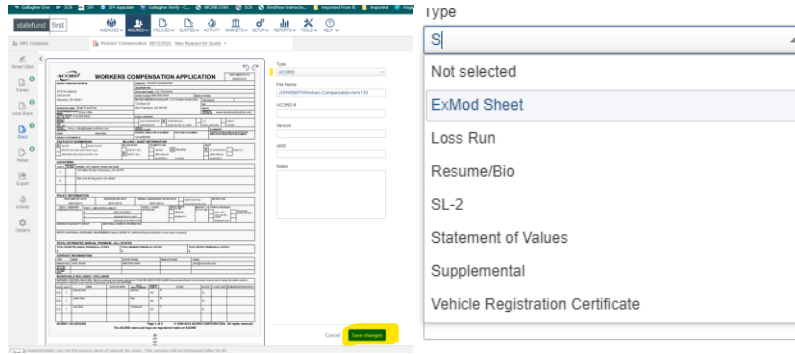
That's it! Your submission has been sent to StateFund First. You will receive an email from StateFund First within 24 hours, confirming receipt and letting you know who your primary contact is.

19. Once all the information is complete, you can attach loss runs (left panel) and submit. All other documents can be attached to the docs section.





20. To upload an attachment from your computer, it will add it to your documents section.

21. Select your document type from the drop down menu. There are several options, for Loss Runs, choose Loss Run, and so on.



**Typical Submission Timeframes**:
- Most New Business under $25K: Instant Quote, Bind Same Day, Online Payment Link, and Policy Number
- Over $25K/Trucking/USL&H/Staffing/PEO/Cannabis: Reviewed by an Underwriter
- Trucking, Cannabis, USL&H – 30 days, Staffing/PEO – 45-60 days)
- Renewals submit 30 days prior to renewal date
- Large accounts over $500k submit 60 days prior

**Instructions for Downloading the Appulate Uplink program**

1. Log into https://sff.appulate.com/tools/uplink using your agency email and password. (This can be accessed from our website wwww.statefundfirst.com after you Log In) Once in Appulate, click to the Tools tab at the top of your page and click on Appulate Uplink. Choose your agency management system from the list. If your system is not listed choose "Other".
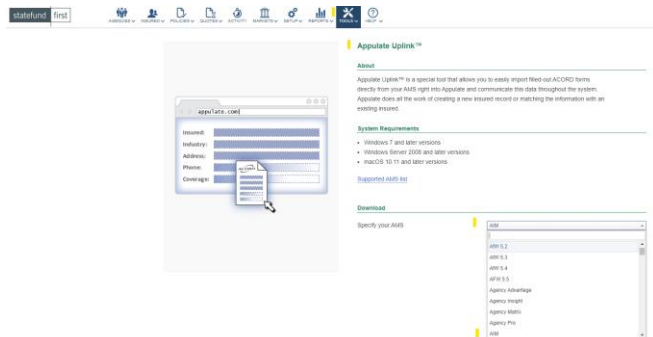


2. Click on Installation Instructions that will determine your installation type based on your network set up. Click the "Download Uplink Driver for Windows" button, and then click "Setupexe" when the box pops up at the bottom of the browser.
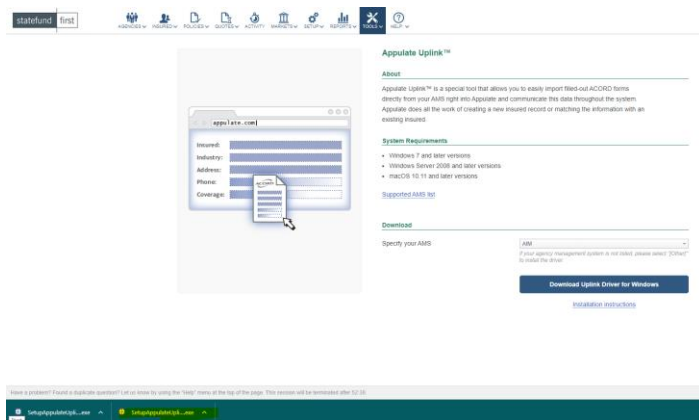


3. The download will start and when it is finished click "Next" again in the box that pops up.
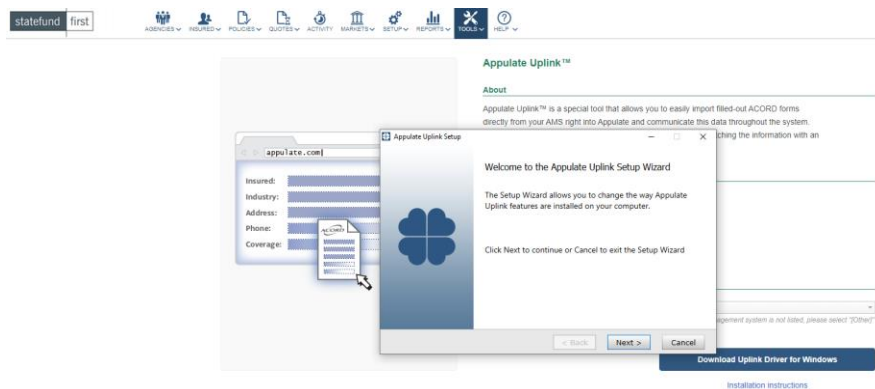


4. After you click "Next", follow the instructions through the installation process.
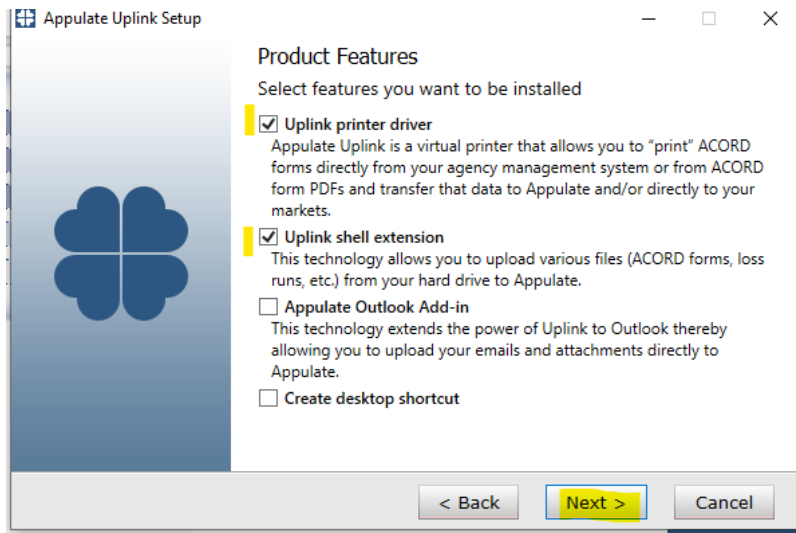
5. After the installation program completes you are finished with setup! Now you may upload your submission (versus manual input). You will still have to enter in the missing data based on the red asterisks.