

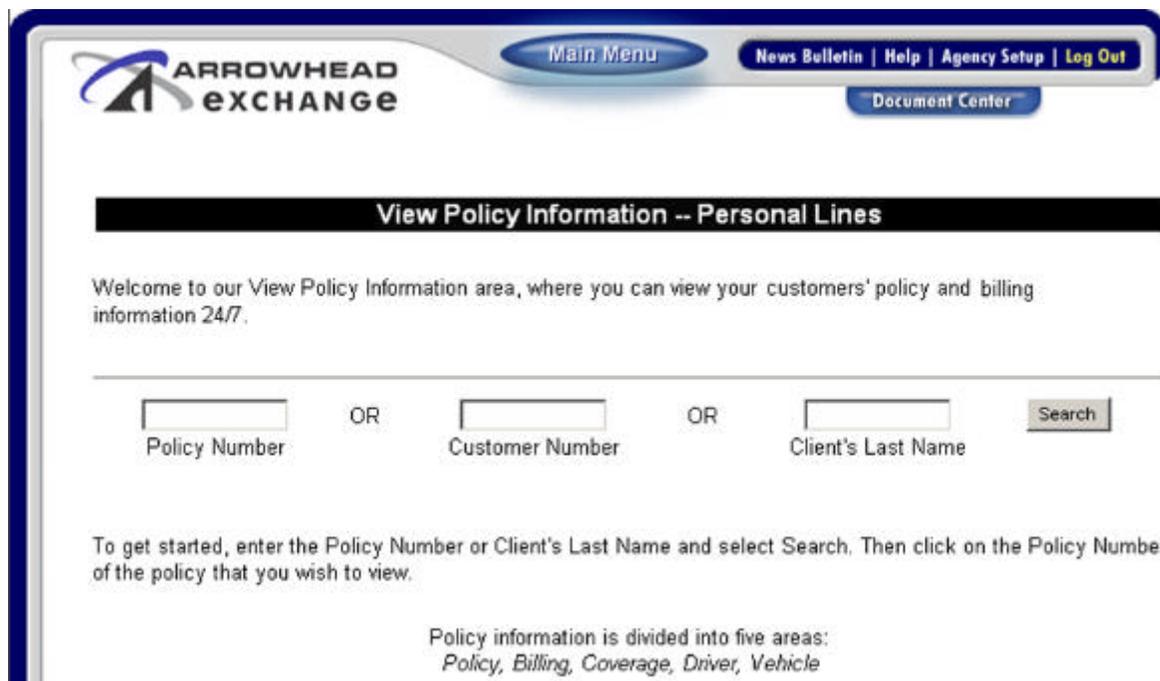
SECTION 4.a: View Policy Info. | Policy Search — Auto



The “View Policy Information” options can be found via the “View Policy Info.” button off of the Arrowhead Exchange Main Menu.

View Policy Information: VPI provides the ability to review Personal Auto policy information for active, as well as inactive policies through Arrowhead Exchange. In addition, active policies or policies in lapse status up to 30 days from the lapse date can be endorsed or an online payment can be made via Electronic Funds Transfer (EFT).

Note: Online payment options via EFT will only be provided for producers that are activated for this payment option. If your producer code is *not* activated for EFT, please call ArrowBind at 800.879.5789, when taking a payment.



A Personal AUTO policy can be accessed by providing one of the following search criteria:

- ◆ Policy Number
- ◆ Customer Number
- ◆ Client's Last Name

Note: Policies issued on our previous processing system cannot be accessed by VPI. If you are unable to reference a policy that is currently in force, please contact Customer Service at 800.333.5553 for policy information.

SECTION 4.a: View Policy Info. | Policy Selection — Auto ... Continued

Once the specific policy has been selected, several policy characteristics can be reviewed, including:

- ◆ General Policy Characteristics: Example: Insured's name & address, effective and expiration dates, pay plan, etc.
- ◆ Billing information and lapse history
- ◆ Coverage information
- ◆ Driver information and driver record information from MVR
- ◆ Vehicle information
- ◆ *Policy documents will be available soon! Print Letters of Experience, MVR Letters, and ID Cards*

The screenshot displays the Arrowhead Exchange web interface. At the top, there is a navigation bar with the Arrowhead Exchange logo on the left and several menu items: "Main Menu", "News Bulletin | Help | Agency Setup | Log Out", and "Document Center". Below the navigation bar is a black header with the text "View Policy Information -- Personal Lines". Underneath the header, it states "4 policies found". A table with five columns is displayed: "Policy Number", "Customer Number", "Insured's Name", "Insured's Address", and "Company". The table contains four rows of data, each representing a different policy. The "Policy Number" column contains blue hyperlinks. The "Insured's Address" column contains redacted information.

Policy Number	Customer Number	Insured's Name	Insured's Address	Company
2646012646	50677792	JESUS	[REDACTED]	Lincoln General Insurance Co.
2603073110	88235882	ALICIA	[REDACTED]	QBE Insurance Company
3073000091	80077800	MICHAEL	[REDACTED]	State and County Mutual Fire
2603128823	41675416	JOSE R	[REDACTED]	Clarendon National Ins Co

SECTION 4.b: View Policy Info. | "Policy" Tab — Auto ... Continued

The first tab provides "Policy" information, such as the insured's full name and address; policy inception date; current effective and expiration date; lapse history; payment method; and premium snapshot, including applicable fees.

ARROWHEAD EXCHANGE | [Main Menu](#) | [News Bulletin](#) | [Help](#) | [Agency Setup](#) | [Log Out](#) | [Document Center](#)

View Policy Information -- Personal Lines

Insured Name: JESUS X XXXXXXXXXX **Customer Number:** 0000000
Policy Number: 0000000000-0 **Company Name:** Lincoln General Insurance Co.

Policy | [Billing](#) | [Coverage](#) | [Driver](#) | [Vehicle](#) | [Generate Policy Docs](#)

Policy Status: Inforce **Payment Plan:** 6 Pay
Policy Term: 183 Days **Submission Method:** Electronic
Origination Date: 04/29/2003 **Insured Address:** 495 S LIBERTY AVE #300
Current Policy Effective: 04/29/2003 TUCSON, AZ 85716
Current Policy Expiration: 10/29/2003 **Insured Phone #:** 520-734-7345
Notes/Comments: [Lapse History](#)

Current Policy Premium Snapshot

Premium & Policy Fees	\$ 287.00
Service Fee	\$ 10.00
NSF Fee	\$ 0.00
Refund	\$ 0.00
Write Off	\$ -1.00
Charge Off	\$ 0.00
Previous Unpaid Balance	\$ 0.00
Total	\$ 296.00
Total Paid	\$ 266.00
Balance Due	\$ 40.00

SECTION 4.c: View Policy Info. — “Billing” Tab — Auto ... Continued

The “Billing” section includes several characteristics of the policy’s status related to billing summary and transaction information. This includes:

- ◆ Policy status; current amount due and due dates; last payment received; express pay option; total term premium and reasons for uprates at new business (premium adjustments)
- ◆ Historic billing information & transaction dates; transaction type; effective and due date; amount billed; date received; and written premium

Note: A complete billing summary can be accessed by clicking on “Show All” toward the bottom of the screen.

“Make a Payment”: We have added a “Make a Payment” button that allows you to make an installment via EFT for active and inactive policy up to 30 days from the lapse date. This function only applies to producer codes activated for EFT transactions.

ARROWHEAD EXCHANGE | Main Menu | News Bulletin | Help | Agency Setup | Log Out | Document Center

View Policy Information -- Personal Lines

Insured Name: JESUS XXXXXXXXX | Customer Number: 0000000
 Policy Number: 0000000000-0 | Company Name: Lincoln General Insurance Co.

Policy | **Billing** | Coverage | Driver | Vehicle | Generate Policy Docs

BILLING SUMMARY:
 Policy Status: Inforce | Payment Plan: 6 Pay
 Current Amount Due: \$25.00 | Due Date: 07/15/2003
 Last Payment Received: \$188.00 | Date Received: 06/26/2003
 Total Term Premium: \$245.00
 Express Pay Policy: N | [Click here for Premium Adjustment History](#)

[Make Payment Now](#)

Trans Date	Trans Type	Effective Date	Due Date	Amount Billed	Date Received	Amount Received	Written Premium
07/01/2003	Cash	07/01/2003			06/26/2003	\$188.00	
07/01/2003	Installment Bill	07/01/2003		\$25.00			
05/08/2003	Installment Bill	05/08/2003		\$57.91			
05/01/2003	Cash	05/01/2003			04/29/2003	\$78.00	
05/01/2003	New Business	04/29/2003					\$287.00

[Show All](#)

SECTION 4.d: View Policy Info. — “Coverages” Tab — Auto ... Continued

The “**Coverage**” section lists each coverage and associated limits for each vehicle.

Note: Additional vehicles, applicable surcharges and discounts will also be reflected within this screen. All surcharges and discounts will appear for all vehicles, but may only apply to certain vehicles on the policy.

Note: Premiums reflected are the current "snap shot" of each vehicle and vary based on status. Cancelled policies reflect the prorated premium.

Online endorsements, “**Make a Change To This Policy**” can be accessed within the coverage, driver and vehicle sections and will reflect the current policy shown in “View Policy Status”.

ARROWHEAD EXCHANGE

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Document Center

View Policy Information -- Personal Lines

Insured Name: JESUS X XXXXXXXXXX Customer Number: 0000000
Policy Number: 0000000000-0 Company Name: Lincoln General Insurance Co.

Endorsements submitted online will be reviewed by Underwriting, therefore will not be reflected on the policy immediately.

[Make A Change To This Policy](#)

Policy | Billing | **Coverage** | Driver | Vehicle | Generate Policy Docs

Coverage	1984 TYTA COROLLA		
	Limit	Deductible	*Premium
Bodily Injury	15000 / 30000		\$135.00
Property Damage	10000		\$110.00
		Total:	\$245.00

Additional Vehicles
None

Surcharges
None

Discounts
None

SECTION 4.e: View Policy Info. — “Driver” Tab — Auto ... Continued

The “**Driver**” section provides the specific characteristics of each driver on the policy, including:

- ◆ Name and gender
- ◆ Marital status
- ◆ Date of birth
- ◆ Years licensed
- ◆ Points*
- ◆ License number
- ◆ License state
- ◆ SR-22 status
- ◆ Whether the driver is listed as excluded*

ARROWHEAD EXCHANGE

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View Policy Information -- Personal Lines

Insured Name: JESUS X XXXXXXXXXX Customer Number: 0000000
Policy Number: 0000000000-0 Company Name: Lincoln General Insurance Co.

Endorsements submitted online will be reviewed by Underwriting, therefore will not be reflected on the policy immediately. [Make A Change To This Policy](#)

Policy | Billing | Coverage | **Driver** | Vehicle | Generate Policy Docs

Name	Gender	Marital Status	DOB	Years Licensed	Points	License Number	Lic. State	Relation	SR-22	Excluded
JESUS X XXXXXXXXXX	M	M	03/12/1928	35	1	0000000	AZ	SELF	N	N
ADELIA X XXXXXXXXXX			09/11/1940	0				SPSE	N	Y

Points - Microsoft Internet Expl...
Violation History

Type	Code	Description	Point
Violation	02342	Speeding	1

[Close Window](#)

***Note:** Driver record information can be accessed by clicking on “**Points**”, which is a link to a new window

SECTION 4.f: View Policy Info. — “Vehicle” Tab — Auto ... Continued

The “**Vehicle**” section includes specific information on each vehicle, including:

- ◆ Year; make; model; symbol; VIN; Loss Payee; Additional Insured; Assigned Driver; and annual mileage

The specific “**Loss Payee**” and applicable address can be referenced by clicking on the Loss Payee listed. If changes need to be made to the Loss Payee, simply click on “**Make a Change to this Policy**”.

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View Policy Information -- Personal Lines

Insured Name: JESUS XXXXXXXXX Customer Number: 0000000
Policy Number: 000000000-0 Company Name: Lincoln General Insurance Co.

Endorsements submitted online will be reviewed by Underwriting, therefore will not be reflected on the policy immediately.

Make A Change To This Policy

Policy | Billing | Coverage | Driver | **Vehicle** | Generate Policy Docs

Year	Make	Model	Sym	VIN	Loss Payee	Additional Insured	Assigned Driver	Annual Mileage
1984	TYTA	COROLLA	8		GMAC			

SECTION 4.g: View Policy Info. — “Generate Policy Docs” Tab — Auto ... Continued

From this area you will be able to print Letters of Experience, MVR Letters, and ID Cards.

ARROWHEAD EXCHANGE

Main Menu | News Bulletin | Help | Agency Setup | Log Out

Document Center

View Policy Information -- Personal Lines

Insured Name: JESUS XXXXXXXXX Customer Number: 00000000
Policy Number: 00000000-000 Company Name: Lincoln General Insurance Co.

Policy | Billing | Coverage | Driver | Vehicle | **Generate Policy Docs**

This Area is Still Under Development.

Please check back soon or visit the [Arrowhead Producer Bulletin](#) for Arrowhead Exchange News and Updates.

From this area you will be able to print Letters of Experience, MVR Letters, and ID Cards.