



DocuSign Renewal Solicitation User Guide

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PHILADELPHIA
INSURANCE COMPANIES

A Member of the Tokio Marine Group



DOCUSIGN

DocuSign Renewal Solicitation User Guide

OVERVIEW

Philadelphia Insurance Companies (PHLY) is now sending Renewal Solicitations via DocuSign for completion.

The Purpose of Renewal Solicitations through DocuSign

Renewal Solicitations are emails that are sent to our agents through DocuSign in anticipation of an upcoming renewal. These emails provide links to digital applications the policyholder will need to remit in order for us to consider offering coverage for the upcoming renewal term. The applications and information that are requested depend on the policyholder's operations and product type that are being solicited.

When the DocuSign envelope is initiated:

The first Renewal Solicitation and creation of the DocuSign envelope will be done via an automated process 85 days prior to the expiration date for the selected policies.

If a DocuSign envelope is received by an outdated agency contact, the envelope will need to be reassigned to the correct individual within your agency. Do not forward the DocuSign email itself. After accessing the envelope via the *Review Documents* button within the email, select *Other Actions>Assign to Someone Else DocuSign*.

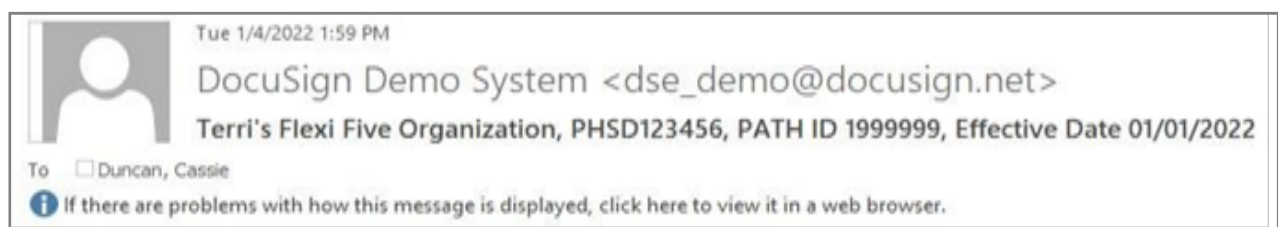
The correct cover letter template, application(s), and supporting documentation (supplemental addendum, warranty, etc.) will be selected from DocuSign and provided to the agency contact within the DocuSign envelope.

Upon the Policyholder's completion of the DocuSign envelope:

Copies will be returned to: Policyholder, Agency, and PHLY

NEW RENEWAL SOLICITATION PROCESS

- Agents will receive an email initiating the Renewal Solicitations via DocuSign for completion.
 - The subject line will include Account Name, Expiring Policy Number, Path ID Number, and Renewal Date.
- Once the Renewal Solicitation is received, the agency contact will begin by clicking "**Review Documents.**"



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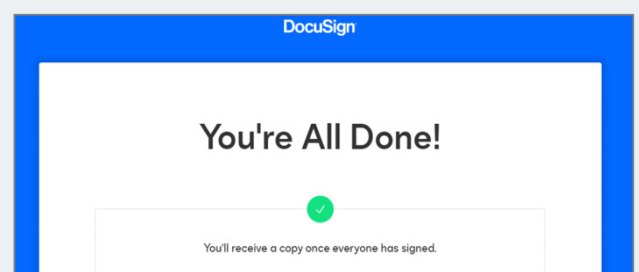
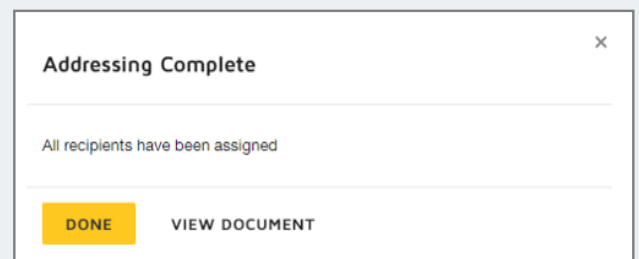
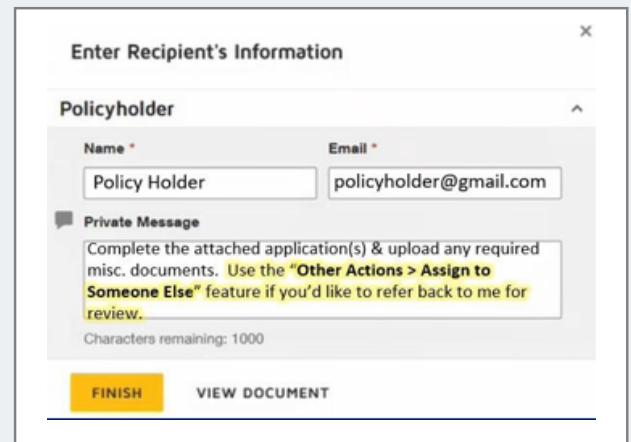
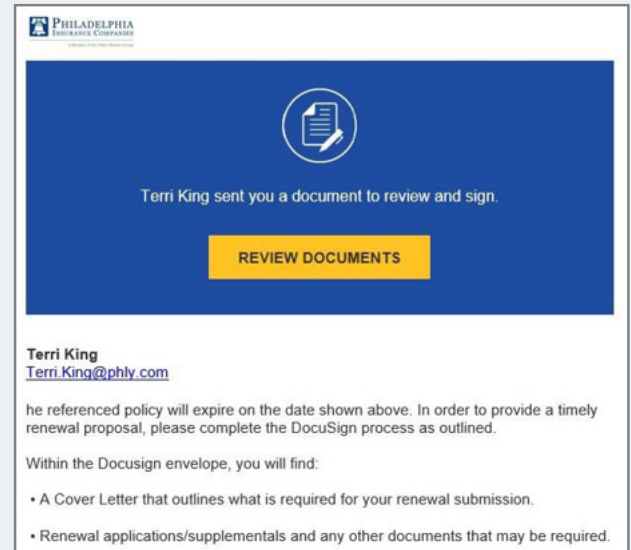
- The agency contact will be directed to the DocuSign envelope contents.
- Agency contacts will have two roles within PHLY's DocuSign Renewal Solicitation process: Application Contribution and Recipient Assignment

1) Application Contribution

- You will have the opportunity to upload documents on behalf of the policyholder if you have access to the supporting documentation.
- All text fields are considered "optional" at the agency completion step. You can complete as much or as little as they'd like.
- Any text fields left blank will be a required field for the policyholder to review later. The policyholder will also have the ability to update anything the agency contact enters on their behalf.
- Once the agency contact has contributed as much as they wish to, they'll select "Finish."

2) Recipient Assignment

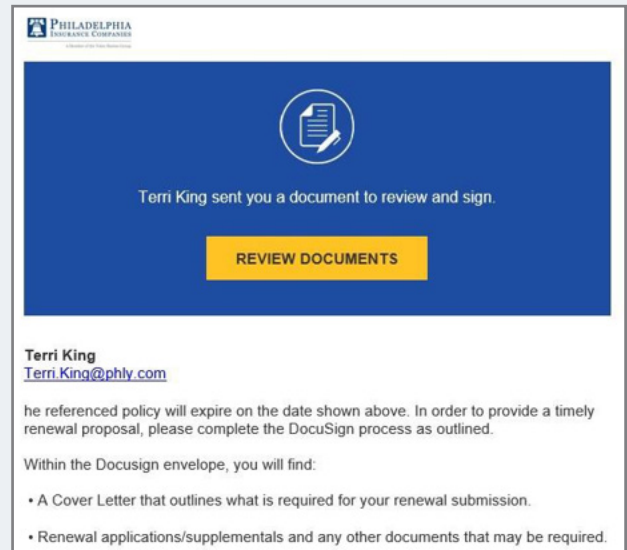
- The agency contact will receive a second DocuSign email, prompting Recipient/Policyholder assignment.
- At this point, you may download a copy of the renewal letter, application, and any additional requirements if you wish to retain for your records by selecting "View Document."
- Enter in the name and email address for the policyholder contact.
- The Private Message field is optional. Suggested instructions to include are: re-requesting the policyholder confirm any information you, the agency contact, have completed on their behalf is correct and/or alerting the insured to the new feature that allows them to assign it back to agency contact if you would first like to review their information prior to submitting to PHLY.
- Select "Finish" once complete.
- Select "Done."
- DocuSign will advise that the agent is done with this step and that you will receive a copy of the completed documents once the policyholder has signed.



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DIRECTIONS FOR THE POLICYHOLDER TO COMPLETE THE APPLICATION

- The policyholder will receive an email from DocuSign to complete the documents. To start the process in DocuSign, they should select **"Review Documents."**
- Once the policyholder is redirected to DocuSign, they will begin with completing the applications by selecting **"Continue."**
- The policyholder will be alerted to the fact that the agency contact has contributed to shared fields within the document and that those fields will be highlighted to stand out so that they can review for accuracy. They'll select **"Continue"** to proceed.
- If at any point during the policyholder completion phase, the individual filling out the forms needs to forward the envelope on to another contact within the business for finalization, this can be done by selecting **"Other Actions"** found within the blue toolbar and choosing **"Assign to Someone Else."** This DocuSign feature can also be utilized to send the envelope back to the agency.
- The Renewal Solicitation will outline what is required for the renewal term. Any additional items required (financials, statement of values, etc.) will need to be uploaded to DocuSign separately via the paperclip icon.



PHILADELPHIA INSURANCE COMPANIES

Terri King sent you a document to review and sign.

REVIEW DOCUMENTS

Terri King
Terri.King@phly.com

he referenced policy will expire on the date shown above. In order to provide a timely renewal proposal, please complete the DocuSign process as outlined.

Within the DocuSign envelope, you will find:

- A Cover Letter that outlines what is required for your renewal submission.
- Renewal applications/supplementals and any other documents that may be required.



Review Your Documents

Philadelphia Insurance Companies

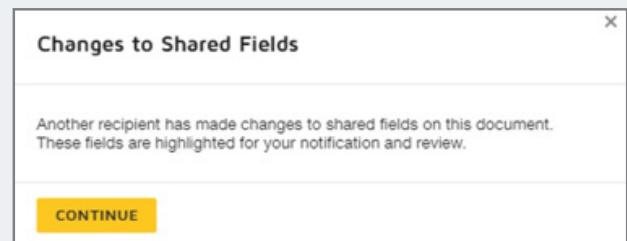
Powered by DocuSign

he referenced policy will expire on the date shown above. In order to provide a timely renewal proposal, please complete the DocuSign process as outlined.

[View More](#)

☒ By clicking here, I confirm that I need the Electronic Signature Disclosure and Consent and I agree to utilize an electronic signature.

CONTINUE **OTHER ACTIONS**



Changes to Shared Fields

Another recipient has made changes to shared fields on this document. These fields are highlighted for your notification and review.

CONTINUE



PHILADELPHIA INSURANCE COMPANIES
A Member of the Tokio Marine Group

One Bala Plaza, Suite 100
Bala Cynwyd, PA 19004

RENEWAL SOLICITATION

In order to provide a timely renewal proposal, please provide the following information at least 45 days in advance of the policy expiration date.

- DocuSign applications
- Most recent financial statements or IRS Form 990
- For Fiduciary Liability Coverage – most recent Form 5500 for each plan covered
- For Crime Protection Plus limits \$1 Million and over – most recent financial statements
- Loss Control contact's name, phone number, and email address

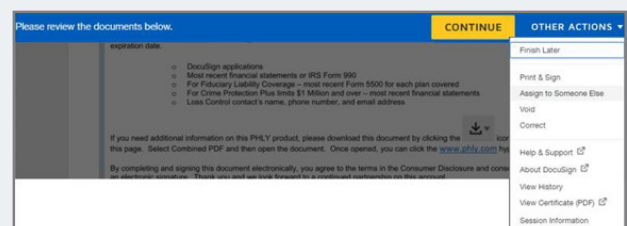
If you need additional information on this PHLY product, please download this document by clicking the  icon at the top of this page. Select Combined PDF and then open the document. Once opened, you can click the www.phly.com hyperlink.

By completing and signing this document electronically, you agree to the terms in the Consumer Disclosure and consent to use of an electronic signature. Thank you and we look forward to a continued partnership on this account.

Please note that you are able to attach additional documents by clicking the paperclip icons below.

Optional Optional Optional




Please review the documents below.

CONTINUE **OTHER ACTIONS**

expiration date:

- DocuSign applications
- Most recent financial statements or IRS Form 990
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Finish Later
Print & Sign
Assign to Someone Else
Void
Correct
Help & Support
About DocuSign
View History
View Certificate (PDF)
Session Information

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- To begin completing the application process, the policyholder should select **"Start."**
 - This will direct the policyholder to the beginning of the application for completion. The application is fillable and should be completed in its entirety. If one of the text fields doesn't apply, leave blank or specify **"N/A."**
 - If an application is attached but doesn't apply, leave blank.
- Additional items needed for rating can be uploaded via the yellow paperclip radio buttons located on the Renewal Solicitation letter.
- Confirm the supporting documentation is saved to the computer and select **"Upload a File."**
- Once the file is uploaded from the computer select **"Done."**
- Each application portion begins with the title of the application. For the policyholder, the application text fields will be identified as follows:
 - Outlined in **blue**: **Optional**
 - Outlined in **red**: **Required**
 - Solid red**: agency contact completed on the policyholder's behalf (policyholder has ability to change if information is not correct)

Please review the documents below.

START

PHILADELPHIA INSURANCE COMPANIES
One Bala Plaza, Suite 100
Bala Cynwyd, PA 19004

RENEWAL SOLICITATION

In order to provide a timely renewal proposal, please provide the following information at least 45 days in advance of the policy expiration date:

- Renewal application
- Most recent financial statements or IRS Form 990
- For Fiduciary Liability Coverage - most recent Form 5500 for each plan covered
- For Crime Protection Plus limits \$1 million and over - most recent financial statements
- Less Credit contact's name, phone number, and email address

START

RENEWAL SOLICITATION

In order to provide a timely renewal proposal, please provide the following information at least 45 days in advance of the policy expiration date:

- DocuSign application
- Most recent financial statements or IRS Form 990
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By completing and signing this document electronically, you agree to the terms in the Consumer Disclosure and consent to use of an electronic signature. Thank you and we look forward to a continued partnership on this account.

Please note that you are able to attach additional documents by clicking the paperclip icons below.

RENEW **RENEW** **RENEW**

Upload Attachment

UPLOAD A FILE

DONE

Upload Attachment

Demo Financial Document.pdf
1 page - Upload Complete

DONE

FLEXI PLUS FIVE RENEWAL APPLICATION
NOT-FOR-PROFIT ORGANIZATION DIRECTORS AND OFFICERS LIABILITY INSURANCE
EMPLOYMENT PRACTICES LIABILITY INSURANCE
FIDUCIARY LIABILITY INSURANCE
WORKPLACE VIOLENCE COVERAGE
INTERNET LIABILITY INSURANCE

THIS IS AN APPLICATION FOR A CLAIMS MADE POLICY
PLEASE READ YOUR POLICY CAREFULLY

Instructions:

- Whenever used in this Application the term **Applicant** shall mean the Parent Organization and its wholly-owned/controlled subsidiaries.
- The **Applicant** is required to complete Sections 1, 2, and 7.
- The **Applicant** should complete other applicable Section(s) for which coverage is desired. (See chart below)
- Please include all requested underwriting information and attachments. Failure to supply may result in delay.

Check Coverage Desired	Section	Requested Limit	Requested Retention
<input checked="" type="checkbox"/> General Information	1	N/A	N/A
<input checked="" type="checkbox"/> Directors & Officers	2	\$1000000	\$5000
<input checked="" type="checkbox"/> Employment Practices	3	\$1000000	\$5000
<input checked="" type="checkbox"/> Fiduciary Liability	4	\$1	\$
<input checked="" type="checkbox"/> Workplace Violence	5	\$	\$
<input checked="" type="checkbox"/> Internet Liability	6	\$	\$
<input checked="" type="checkbox"/> General Summary	7	N/A	N/A

SECTION 1 - GENERAL INFORMATION
(All Applicants **must** complete this Section)

1. Name of Parent Organization: **Tam's Flexi Five Organization**

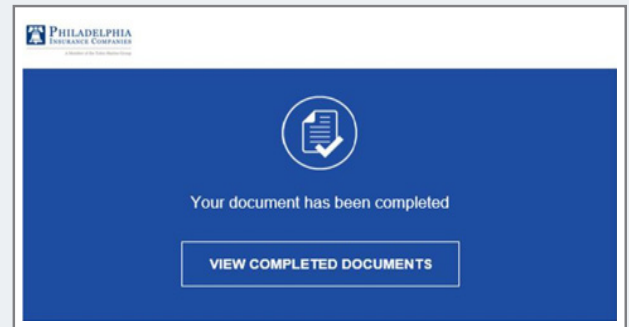
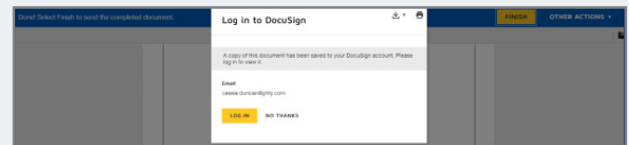
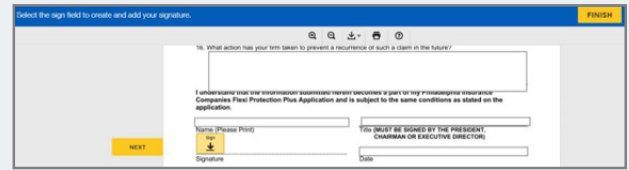
2. Change in Address: ☐ None or Change in internet address: ☐ None or **Optional**

3. Has **Required** any changes in the Applicant's operations? ☒ Yes ☐ No **If yes, please provide details.**

4. Does the Applicant have a tax-exempt status under the U.S. Internal Revenue Code? ☐ Yes ☐ No **If no, provide an explanation.**

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- Once the application has been fully completed and signature page reached, clicking the **“Sign”** icon will complete the policyholder’s digital signature.
- Once the application has been completed and signed and any other required documents have been uploaded, select **“Finish.”**
- If there are any missing signatures the policyholder will be directed to complete them at this point in the process.
- A pop up box will follow with a notification that the document has been saved to policyholder’s DocuSign account. The policyholder will then see a pop up box notifying them that the document has been saved to their DocuSign account.
- Upon completion it will send a copy to PHLY’s system for underwriting review. If additional information is needed to proceed with underwriting PHLY will reach out directly.



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