

PHLY USER GUIDE

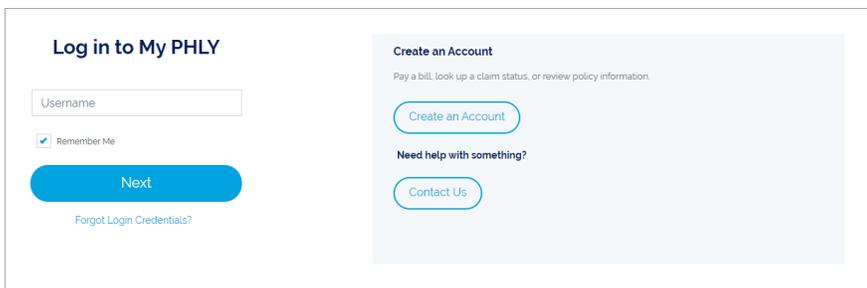
MyPHLY REGISTRATION PROCESS

HOW TO ACCESS MyPHLY

1. Click Log in/Register button from the PHLY.com home page.



2. Enter your Username, then click the Next button.
3. If you need to register, click Create an Account button.



REGISTRATION

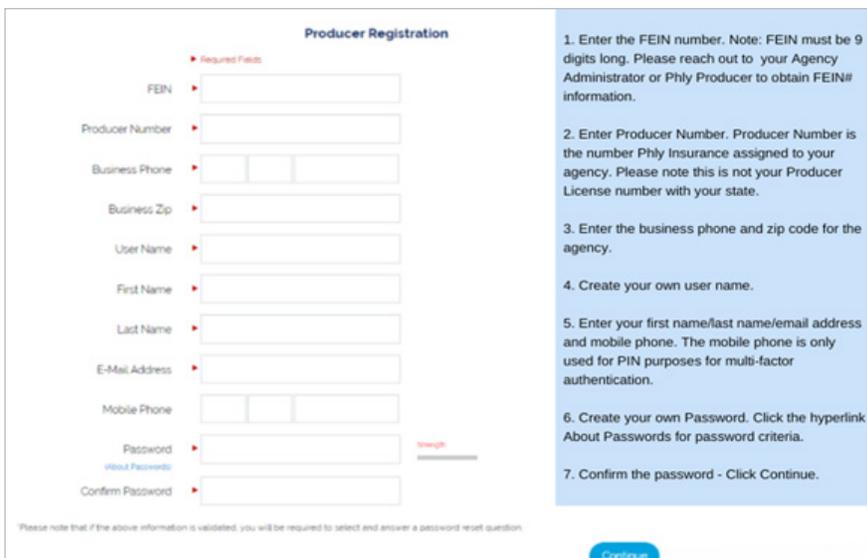
This website was created for Philadelphia Insurance Companies producers and policyholders. Unauthorized access to this website is prohibited. Only you may use the username you created. You are responsible for all activities using your username ID. Producers - by creating and using an ID, you verify that you are authorized by your employer to access the information on this website.

HOW TO REGISTER A USERNAME:

1. Click the Login/Register button from PHLY.com home page.
2. Click Create an Account.
3. Click Producer for the type of account you are registering.
4. Fill in the required information and click the Continue button.

Choose the type of account you will need to create.

- Insured (Purchases insurance products)
 Producer (Sells insurance products)



Producer Registration

1. Enter the FEIN number. Note: FEIN must be 9 digits long. Please reach out to your Agency Administrator or Phly Producer to obtain FEIN# information.

2. Enter Producer Number. Producer Number is the number Phly Insurance assigned to your agency. Please note this is not your Producer License number with your state.

3. Enter the business phone and zip code for the agency.

4. Create your own user name.

5. Enter your first name/last name/email address and mobile phone. The mobile phone is only used for PIN purposes for multi-factor authentication.

6. Create your own Password. Click the hyperlink About Passwords for password criteria.

7. Confirm the password - Click Continue.

Please note that if the above information is validated, you will be required to select and answer a password reset question.

Continue

MyPHLY USER GUIDE

VERIFY YOUR ACCOUNT:

After clicking Continue on your MyPHLY registration form, you will be sent a PIN for multi-factor authentication purposes. You may also need to verify the PIN when resetting your password.

You will have the option to send the PIN to your mobile phone or email. We highly suggest your mobile phone for a faster verification process.

VERIFY YOUR ACCOUNT

You will be required to verify the account by having a PIN sent to either your email address or mobile phone number. Select the method to receive your PIN. Once received, enter it in the field. **Please note: that email can get blocked by firewalls or marked as spam. Receiving the PIN via text is more reliable.**

Step 1: How Should We Contact You?

Email Address Text Message Standard Phone and SMS Charges May Apply

Step 2: Verify Your PIN

Please type the PIN you received here:

USERNAME REQUEST:

1. Click the Login/Register Button on PHLY.com home page.
2. Click Forgot Password/Username.
3. Enter the Email Address associated with you PHLY.com account and click submit.

USERNAME REQUEST

To retrieve your username please enter the e-mail address associated with your Phly.com account and select 'Submit'. If the e-mail address entered matches an account in our system we will send an e-mail message containing your username.

E-mail Address

PASSWORD RESET REQUEST:

1. Click Forgot Password/Username.
2. Enter your Username and Email Address associated with your PHLY.com account and click submit.

PASSWORD RESET REQUEST

To reset your password, please enter your username and the e-mail address associated with your Phly.com account. If the information you entered matches that of an account in our system, we will send an e-mail message containing instructions on how to reset your password.

Username

E-mail Address

PASSWORD RESET QUESTION

After the PIN has been verified, the password reset page will be presented. Please re-enter the password you just created and set up a password reset question. If you forget your password, we will ask you this security question and you will enter the answer you have selected. Please note that your answer is case sensitive. When registration has been completed, you will be directed to **Continue to MyPHLY**.

✔ Your question and answer were successfully saved.

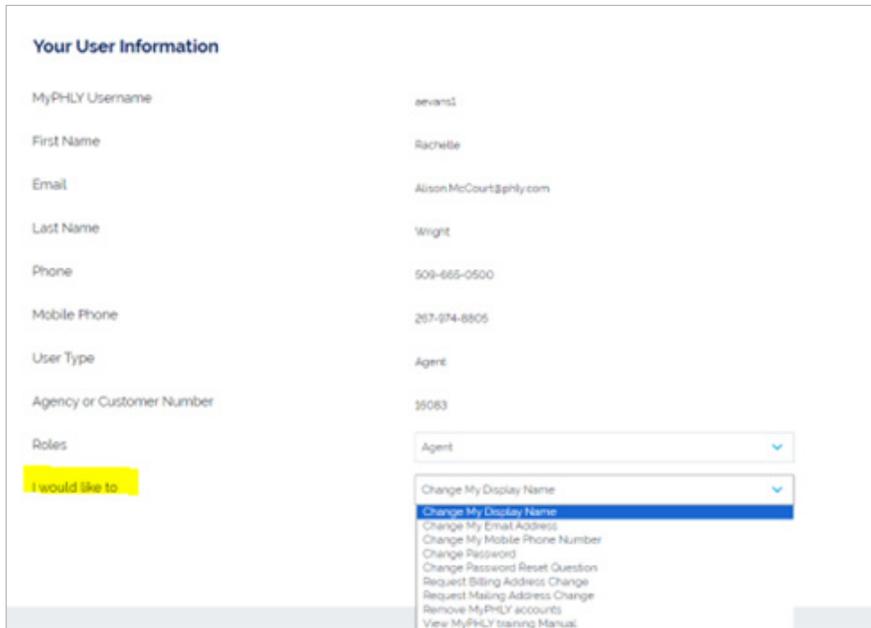
[Continue to MyPhly](#)

MyPHLY USER GUIDE

RESOURCES

You can change your Display Name, Email Address, Phone Number, Password, Password Reset Question, Address Change, Remove MYPHLY Accounts and access our Training Manual.

1. Click Resources drop-down
2. Click Edit Profile
3. Click from the dropdown that says, "I would like to" to select the change you would like to submit



MyPHLY REGISTRATION PROCESS

PHLY HOMEPAGE

You can find our featured products, link to the full product list, information about PHLY Careers, Why Choose Us, PHLY updates and our social media information.

The screenshot displays the PHLY homepage layout. At the top, there are three main navigation buttons: "Explore Easy Options", "New Quotes and Submissions", and "Welcome". Below this is a large banner for "ELECTRONIC BINDING" with the tagline "We Make It EASY!".

The "Featured Insurance Products" section includes icons for Special Events, Education, Accident & Health, Agribusiness, Integrated Technology, Surety Bonds, Environmental, and Guides & Outfitters. A "All Products" button is located below these icons.

The "Begin Your Next Chapter" section features a video player with the title "PHLY Culture: Our Passion" and a "Find Your Career" link.

The "The PHLY Difference" section highlights three key areas: "Financial Strength You Can Count On", "Best-in-Class Claims Experience", and "Unsurpassed Customer Service". Each area includes a brief description and a "View our score" link.

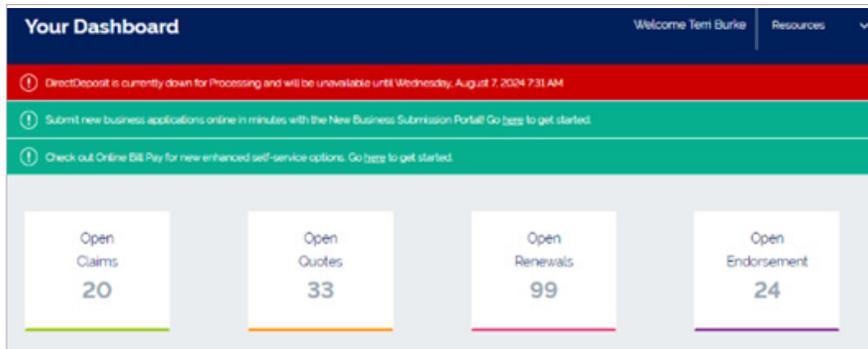
The "Bulletins and Notices" section provides a link to "View All Bulletins and Notices".

The footer contains a "Blogs & News" section with recent articles, a "PHLY on Social Media" section with social media icons, and a navigation bar with links for "Paying your bill? Have a claim? Check policies?", "Log in to My PHLY", and "Need something else?".

MyPHLY USER GUIDE

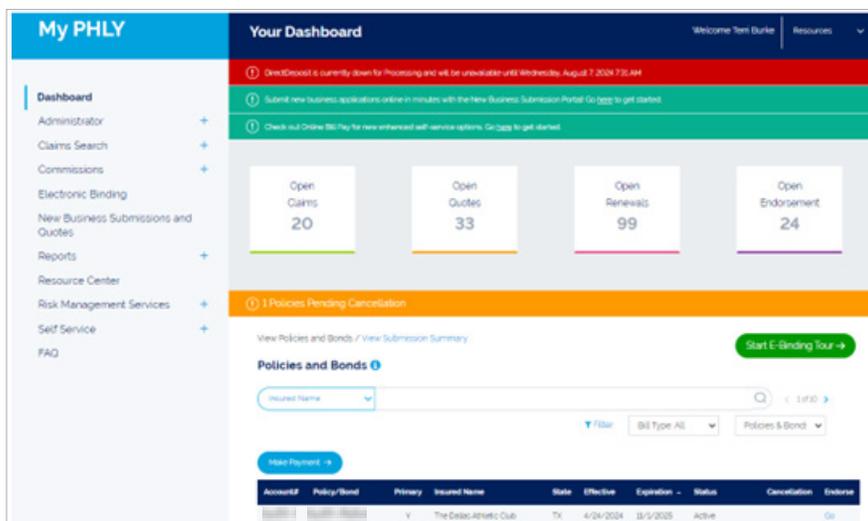
MyPHLY DASHBOARD TILES

Please note any notification or update banners may periodically appear at the top.



MyPHLY DASHBOARD HOMEPAGE

Click on the Dashboard Left Navigation Menu to access: Claims Search, Commission, Electronic Binding, New Business Submissions and Quotes, Reports, Resource Center, Risk Management Services and Self Service.

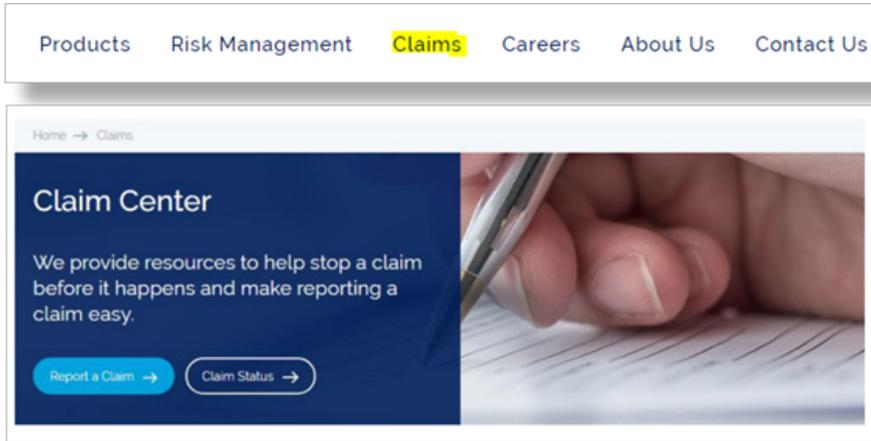


Search Policies and Bonds to locate all the policies linked to your username. Please note if you have many accounts, you may have multiple pages. You can click through each page of your accounts by clicking on the page arrow button to the right of the search bar, or you may enter in the policy information to filter your results.

MyPHLY USER GUIDE

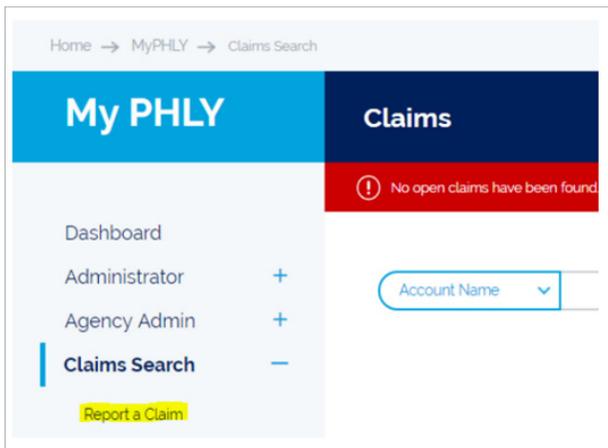
HOW TO REPORT A CLAIM:

1. On the Top Navigation Menu, Click Claims
2. Click Report a Claim



OR

1. When logged into PHL.com, Click Claims Search on Left Navigation Menu.
2. Click Report a Claim.



SAMPLE CLAIMS REQUEST FORM:

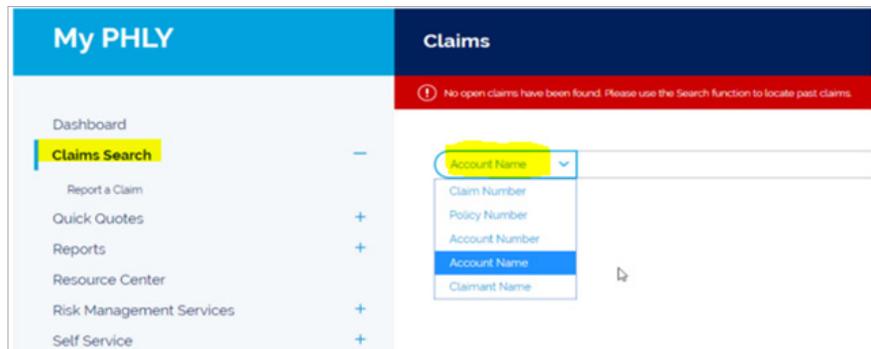
The screenshot shows the 'Auto Report Claim' form. The form is titled 'Auto Report Claim' and has a progress indicator showing 1 of 7 steps. The first step is 'Contact Information'. The form has the following fields:

- Name of Person to Contact:
- Email Address of Person to Contact:
- Phone Number of Person to Contact: - -
- Person Reporting Claim:

MyPHLY USER GUIDE

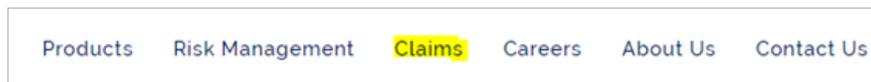
HOW TO CHECK ON CLAIMS STATUS:

1. Click Claims Search on Left Navigation Menu.
2. Use Search filters to search for claim by the Claim Number, Policy Number, Account Number, Account Name or Claimant Name.

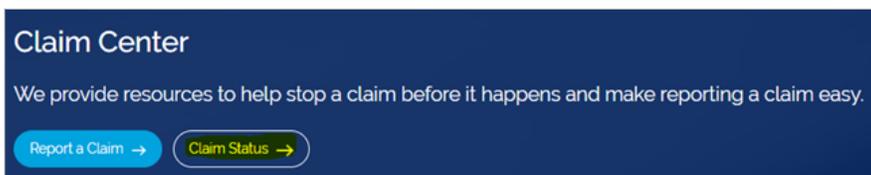


OR

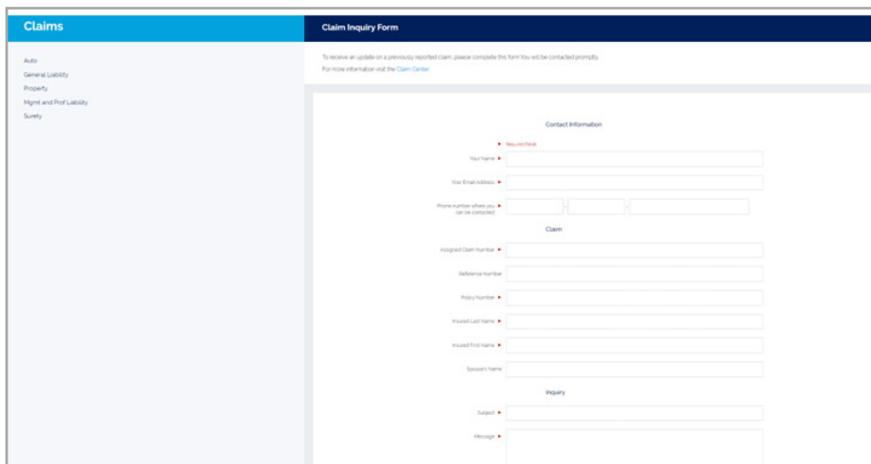
1. You can send us a claims inquiry or message via email by Click Claims at the Top Navigation Menu.



2. Click Claims Status button.



3. Fill out the Claims Inquiry form with all of the required information.



HOW TO MAKE AN AGENCY BILL PAYMENT

1. From the Left Navigation Menu, click on Self-Service.
2. Click Online Bill Pay to view current balances on accounts and pay bills online.

HOW TO VIEW AGENCY BILL STATEMENTS

1. From the Left Navigation Menu, click on Self-Service.
2. Click Online Bill Pay to view current balances on accounts and pay bills online.

MyPHLY USER GUIDE

HOW TO ALLOCATE PAYMENT CREDITS TO MULTIPLE ACCOUNTS

Step 1: Check the box to use Available Credits

Step 2: Click the blue \$-412.50. This will then move the amount of the credit to the Net Credit Applied Column.

Step 3: In the Net Credit Applied Column, you will then add the credit to a policy with an amount due. For example, I added the same credit to the policy that the credit issued from, just above the credit line. After entering the amount, the screen will refresh. *The full credit must be applied through open balances. I can split the 412.50 through 3 policies or just have it applied to 1. You cannot partially apply a credit.***

Step 4: You will then add an amount to pay in the Net Payment applied box.

Step 5: If a comment is needed, it will show yellow. This comment will be required before you can select Proceed to Payment.

Policy Number	Insured	Net Balance	Net Credit Applied	Net Payment Applied	Difference	Comments
MAAGURE	MAAGURE	\$11,075.90	\$-412.50	\$0.00	\$11,258.00	Comment Needed
MAAGURE	MAAGURE	\$3,795.92	\$412.50	\$0.00	\$0.00	Comment Optional
MAAGURE	MAAGURE	\$123.75	\$0.00	\$0.00	\$0.00	
MAAGURE	MAAGURE	\$-1,336.50	\$0.00	\$0.00	\$36.50	
MAAGURE	MAAGURE	\$-1,337.32	\$0.00	\$0.00	-\$1,337.32	

HOW TO ACCESS REPORTS

- From the Left Navigation Menu, click Reports to view various reports that can be utilized in managing day-to-day business.

- Dashboard
- Administrator
- Claims Search
- Commissions
- Electronic Binding
- New Business Submissions and Quote
- Reports**
- Bound Business
- Business Status
- Delinquency Reports
- In-Force Business
- Loss Ratio Summary

PENDING BUSINESS REPORT

This will allow a quick search for the status of new and renewal business, endorsement, quotes and cancellation transactions.

- Click Reports from the Left Navigation Menu on the Dashboard

My PHLY Reports

Select a report you wish to run.

- Business Status
- Delinquency Reports
- In-Force Business
- Loss Ratio Summary
- Loss Runs
- Risk Management Services
- Policy Tracking
- Open Endorsements
- Open Renewals
- Open Quotes
- Request a Custom Report
- Bound Business

- Click Business Status, then filter by information needed and account information to generate report.

Step 1: Pick a Transaction or Transactions

- Open New Business Submissions
- Open Renewals
- Endorsement
- Endorsement Quotes
- Non-pay Cancel
- MTC Cancel

Step 2: Search by Account or By Date

Ending Account:

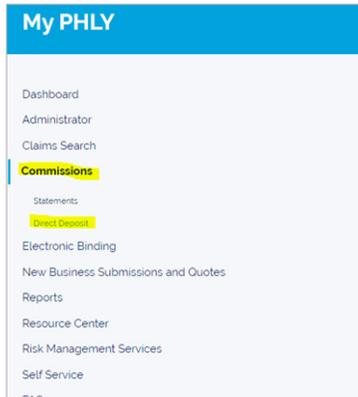
Search Account Name or Number:

Transaction Date Range (up to 1 year)

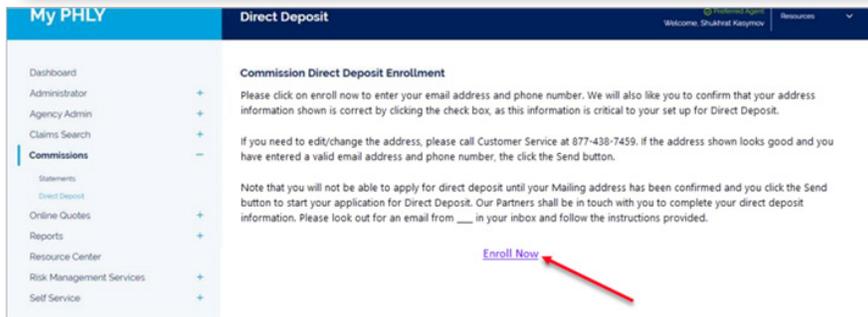
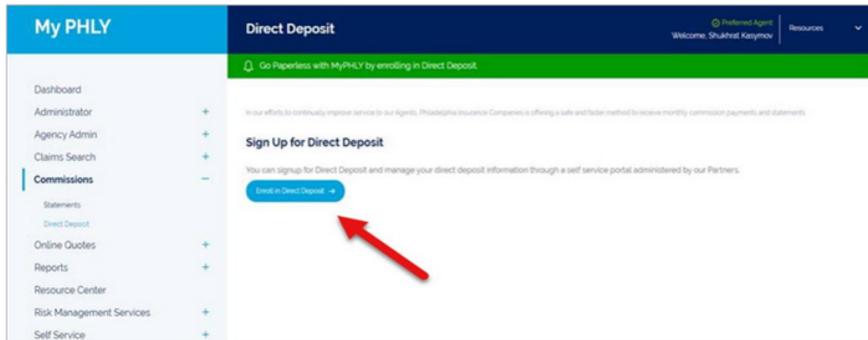
From: To:

MyPHLY USER GUIDE

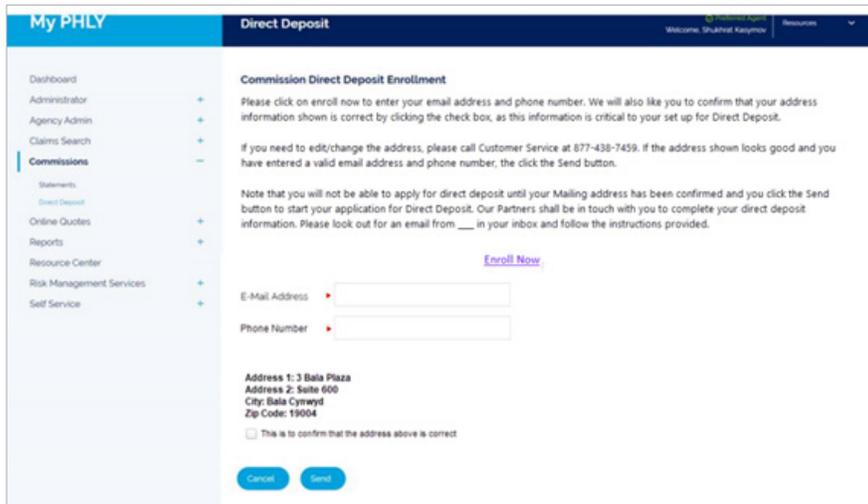
HOW TO ENROLL IN DIRECT DEPOSIT COMMISSIONS



1. Click Commissions
2. Click Direct Deposit to Enroll
3. Click Enroll in Direct Deposit button
4. Click Enroll in Direct Deposit button
5. Click Enroll Now link



6. Once you select to Enroll, you will need to confirm your email address, phone number



MyPHLY USER GUIDE

HOW TO ENROLL IN DIRECT DEPOSIT COMMISSIONS - continued

7. Once you have confirmed your information and click send, you will get the next screen stating your Enrollment is pending. The information is sent to Wells Fargo

NOTE: For security processes, Wells Fargo will send two emails consisting of information needed to finish enrollment.

- One email will consist of the Activation ID.
- The second email will consist of Supplier ID 6.

8. Once you receive both ID's, you will find the Enrollment Instructions within the emails from Wells Fargo to register.

Enrollment instructions

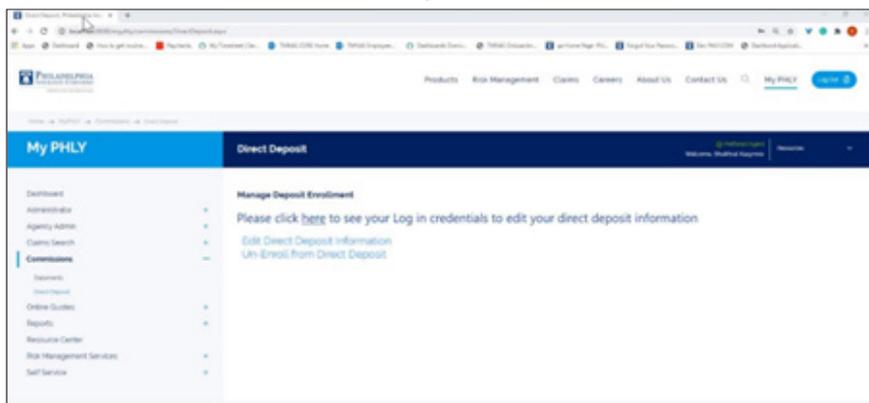
- Enter www.supplieronboarding.com directly into your browser's address bar.
- Profile authentication
 - Enter your user name and password or select **New User Registration** to create them.
 - A code will be sent to the registered email address. Enter it in the One Time Passcode field and select **Submit**.
 - Provide the requested information and select **Submit**.
 - To add your customer to your profile, enter the Activation ID and Supplier ID provided and select **Add relationship**.
 - Select **Enroll/Update** below Action.
- Enrollment
 - Complete required fields on the Enrollment form and select **Submit**.
 - A confirmation email will be sent to the registered email address.

9. Once you submit the ACH electronic Form, the information is sent to Wells Fargo to be processed.

****Please Note this process could take up to 14 business days to confirm your banking information has been updated with PHLY.****

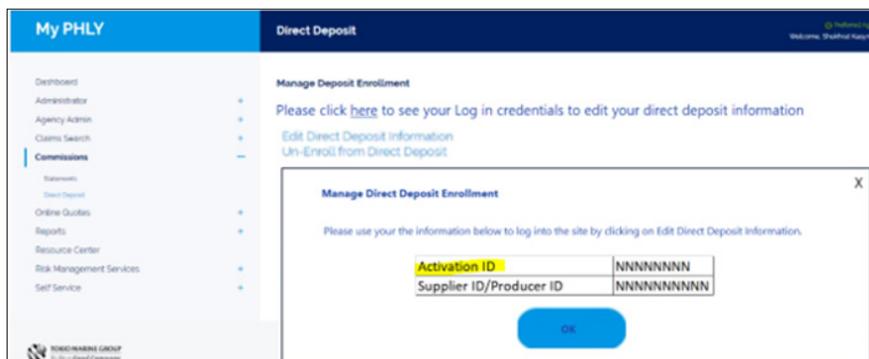
HOW TO EDIT YOUR DIRECT DEPOSIT

1. Log into your PHLY.com account
2. Click Commissions, then Click Direct Deposit



STOP!

3. Before you click on Edit Direct Deposit, refer to screen shot below to make sure you grab your Activation and Supplier ID



MyPHLY USER GUIDE

HOW TO EDIT YOUR DIRECT DEPOSIT - continued

4. Click on Edit Direct Information

NOTE: This will bring you to the Wells Fargo Portal to Sign in with your Username/Password and you may skip to Step 7. If you have not made any edits prior to June 2022, you will need to Select New User Registration and continue with Step 5.

5. Select New User Registration

The screenshot shows the 'WELLS FARGO' logo at the top left. Below it is the heading 'Supplier Analysis & Onboarding'. There is a 'Sign on' section with fields for 'Username' and 'Password', and a red 'Sign on' button. To the right, a message states: 'As of June 2022 a Username and Password are required to access the site. [Select New User Registration to create a Username and Password.](#)' Below this is a 'Need Help?' section with links for 'Forgot Username', 'Forgot Password', and 'Frequently Asked Questions'. At the bottom, it says 'Contact us: WellsOne® Service Center 1-866-377-9533'.

6. This will bring you to the New User Registration Form. This must be completed.

The screenshot shows the 'New User Registration' form. It includes fields for 'First Name', 'Last Name', 'Email', 'Confirm Email', 'Time Zone' (set to 'American Eastern Time'), 'Phone', 'Create Username', 'Activation ID', 'Supplier ID', 'Password', and 'Confirm Password'. Below these are three challenge questions, each with a 'Question' dropdown and a 'Response' text box. At the bottom are 'Submit' and 'Cancel' buttons.

7. Once you select Submit, this should bring you to the ACH Acceptance Form (see below).

The screenshot shows the 'ACH Acceptance Form' within the 'Supplier Analysis & Onboarding' interface. It includes fields for 'Account Number', 'Ratpee Account Number', 'Contact Us', and 'Sign Off'. There are checkboxes for 'Account Type' (checked), 'Receive PDF Remit of Remittance Details with Secure Document Delivery', and 'Receive CSV Format of Remittance Details'. Below this is a text area for 'Enter any additional information your customer may need to know'. The 'Dual Account Verification Information' section includes fields for 'Co-worker Name', 'Co-worker Email Address', and 'Ratpee Co-worker Email Address'. At the bottom are 'Submit' and 'Decline ACH' buttons. The footer includes '© 1999 - 2021 Wells Fargo. All rights reserved.'

NOTE!

**Remittance email is where commission statements will be sent.

**Both editor and coworker listed in the ACH Acceptance Form MUST verify the Test Deposits.

Test Deposits typically take between 2-4 business days to post.

Email verification request received approximately 4 business days after registration. Email verification reminders will be sent 6-8 days after registration.

Enrollee and coworker must respond to test deposit verification email.

8. Once you submit the ACH electronic Form, the information is sent to Wells Fargo to be processed.

MyPHLY USER GUIDE

NEW BUSINESS SUBMISSIONS & MID-TERM QUOTES

Online quotes are available for Special Events Liability, Storage Tank Online Application, Fitness Studios, Business Owners (BOP) Online Application, Homeowners Association Portal, Hunting Lease Premium Indication, Amateur Sports Premium, PHLly Bond Express, Antique Collector Car and National Flood Insurance policies.

1. From the Left Navigation Menu, click New Business Submissions and Quotes
2. Click on one of the available Quick links for a Quote or Click Start New Submission button to submit a new business application

The screenshot shows the MyPHLY dashboard. On the left is a navigation menu with items like Dashboard, Claims Search, Commissions, Electronic Binding, **New Business Submissions and Quotes**, Business Owners Policy (BOP), Reports, Resource Center, Risk Management Services, Self Service, and FAQ. The main content area is titled 'Quoting Portals' and includes a sub-header 'Apply online, receive a premium indication or bind a policy for selected products based on the categories below.' It features three columns: 'Obtain a Policy (Quote and Bind)' with links for Antique Collector Car, Business Owners (BOP) Online Application, Fitness Studios, National Flood Insurance, Surety - PHLly Bond Express, and Special Events; 'Premium Indication (Quick Quote)' with links for Amateur Sports, Hunting Lease, and Storage Tank; and 'Electronic Applications (No fillable PDFs, No Quote)' with a link for Homeowners Association. Below these is a 'New Business Submissions' section with a 'Start New Submission' button.

If you would like to view our full product list, Click Products at the Top Navigation Menu.



When the submission is complete, you will receive a confirmation email. A PHLly representative will contact you to discuss the quote.

PHLY BUSINESS OWNERS POLICY (BOP)

PHLYBOP product offering is approved in specific states (see map on page). The PHLlyBOP portal provides the ability to quote, bind, and issue.

The screenshot shows the 'New PHLlyBOP' portal page. At the top is the navigation bar with the PHLly logo, Products, Risk Management, Claims, Careers, About Us, Contact Us, a search bar, and a 'My PHLly' button with a 'Log Out' option. Below the navigation bar is a breadcrumb trail: Home → MyPHly → New PHLlyBOP. The main content area has a blue header with 'My PHLly' and 'New PHLlyBOP'. A 'Preferred Agent' badge says 'Welcome Shaaz Tariq' and there is a 'Resources' dropdown. The main content features a large image with the text 'PHLY Producers can get a quote online using the new PHLlyBOP portal.' and a 'Start Here' button. Below this is a 'New Enhancements!' section with a link for 'PHLYBOP Release Notes 09/27/24' and a download icon. At the bottom, there is a 'The PHLly Difference' section and a 'Producer Contact' box with the following information: Scott Young, Scott.Young@phly.com, Support Contact, and Customer Service.

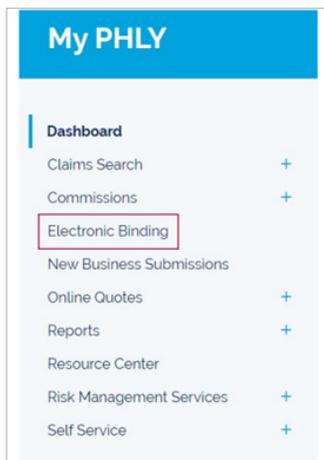
MyPHLY USER GUIDE

PHLY.COM BINDING CONDITIONS POP-UP REQUIREMENTS

- User should be able to upload documents and write Agents' notes without having to select any binding conditions.
- If the user selects any binding conditions, they must upload a document or write an agent note.
 - If a user uploads a document, they must select a Doc Type for each document uploaded.
- If the user selects the TRIA rejection form, they must upload the TRIA rejection form.

HOW TO E-BIND A POLICY

1. From the Left-side menu, click Electronic Binding



2. You will see a list of the submissions that are eligible for Electronic Binding. Click the BIND button to start the binding process.

Account Number	Submission ID	Type	Primary	Insured Name	State	Effective Date	Expiration Date	Status	Date Created
W0000	Health-0000	Renewal	Y	W0000 Health-0000000	CA	12/21/2022	12/21/2023	Bind	7/23/2022
W0000	Health-0000	Renewal	Y	W0000 Health-0000000	CA	12/21/2022	12/21/2023	Bind	7/23/2022

3. If the submission includes binding conditions, a pop-up window will open that will list the required conditions for the submission. In this screen, you will have the ability to upload condition documents (including TRIA rejection form) and write a note to your Underwriter

The 'Binding Conditions' pop-up window contains instructions for the user to follow. It includes a section for 'Agent Notes' with a text area and a 'Document Upload' section with an 'Upload/Edit Files' button. There is also a 'Select Binding Conditions' section with checkboxes for 'Property Executed Application Signed / Dated by the PRESIDENT, CHAIRMAN OR EXECUTIVE DIRECTOR PRIOR TO BINDING', 'Condition 1', and 'Condition 2'. A 'TRIA rejection form' checkbox is also present. 'Next' and 'Cancel' buttons are at the bottom.

The 'Binding Conditions Uploads' window shows a file upload interface. It indicates '1 file was chosen' and has a 'Browse files' button. A table lists the uploaded file: 'Application - Motorsports Club ...' (956 KB) with a 'Document Type' of 'Supplemental Applications'. A list of allowed file types is provided: .doc, .docx, .pdf, .jpg, .jpeg, .gif, .bmp, .png, .tif, .tiff, .xls, .xlsx, .eml, .emlx, .msg. A note states: 'Following packages will be used to scan file(s): * MSCW 5.12'. File size and quantity limits are also shown: 'File size is limited to 20 (MB) per file. Maximum Files: 15. Total file size is limited to 60 (MB)'. A 'Next' button is at the bottom.

You can upload a variety of documents including word, pdf, excel, html, jpeg. Upload the documents which correspond to a particular condition, select the Doc Type you think is best suited and mark the corresponding condition. Ex: Acords, Supplemental Applications, Financial, Statement of Value, Loss Runs, Other.

MyPHLY USER GUIDE

HOW TO E-BIND A POLICY - continued

- Once the conditions are completed, the Billing Information screen will pop up. Please enter the email address you would like to receive the Confirmation of Coverage to.

The screenshot shows the 'Bind Submission' form. At the top, 'Premium Finance' is set to 'Yes' with a selected radio button. Below it, 'Bill Type' is 'Agency Bill' and 'Bill Plan' is 'Fixed Annual', both shown in dropdown menus. A text prompt asks for an email address for confirmation of coverage, with a note that it's for one-time use. The email field contains 'danielle.shinder@pily.com'. At the bottom right are 'Submit' and 'Cancel' buttons.

**** For Quotes without Pending Conditions, the TRIA rejection form selection check box and upload button has been added to the Premium Finance screen ****

This screenshot shows the 'Bind Submission' form with 'Premium Finance' set to 'No'. It includes the same 'Bill Type' and 'Bill Plan' dropdowns and email field as the previous screenshot. A new section below the email field states: 'If you decline to purchase terrorism coverage, please upload the signed TRIA rejection form here:'. Below this text is a checked checkbox labeled 'TRIA rejection form' and a 'Browse file' button. 'Submit' and 'Cancel' buttons are at the bottom right.

- Once the Premium Finance screen is completed, SUCCESS pop-up screen will appear (see below).

The 'Success!' pop-up screen displays a checkmark icon and the text: 'Your binding request has been processed successfully. See details below. We will provide confirmation of coverage to the email address provided. Thank you!'. Below this is a table of policy details:

Policy Number:	██████████
Insured Name:	TestAccountCAST
Effective Date:	2023-08-25
Expiration Date:	2024-08-25
Premium Amount:	Final Premium will be provided at policy issuance
Type of Policy:	Flexi Plus Five

A note at the bottom reads: 'Note - If you do not receive Confirmation of Coverage email within 1 hour, please call Customer Service at 877-438-7459'. A 'Close' button is at the bottom center.

MyPHLY USER GUIDE

HOW TO LOGOUT

1. Click the Log Out button on the top right of the Top Navigation Menu.



800.873.4552 | **PHLY.com**

