PHILADELPHIA INSURANCE COMPANIES

A Member of the Tokio Marine Group

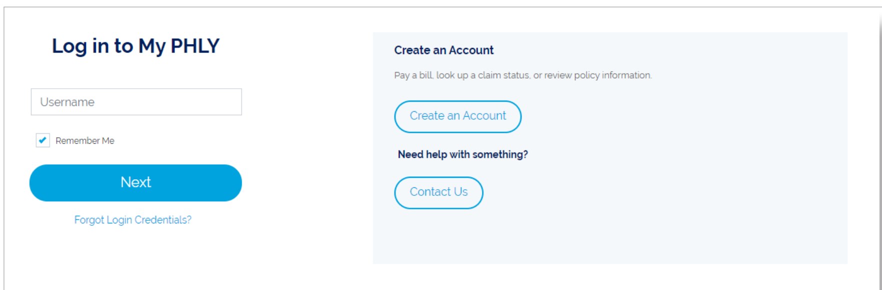
PHLY USER GUIDE

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.

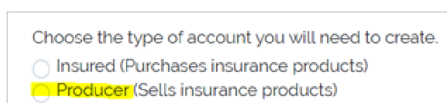


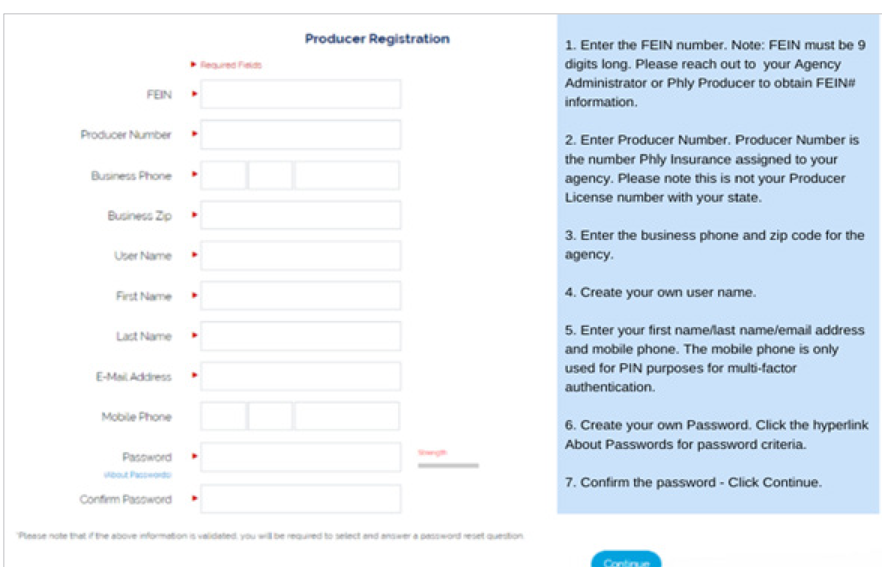
REGISTRATION

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.

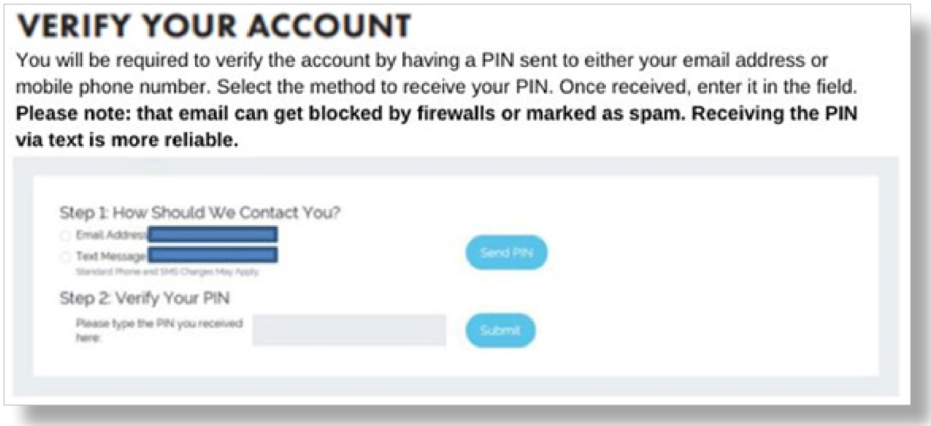




VERIFY YOUR ACCOUNT:

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 [redacted]

Text Message [redacted]

Standard Phone and SMS Charges May Apply

Send PIN

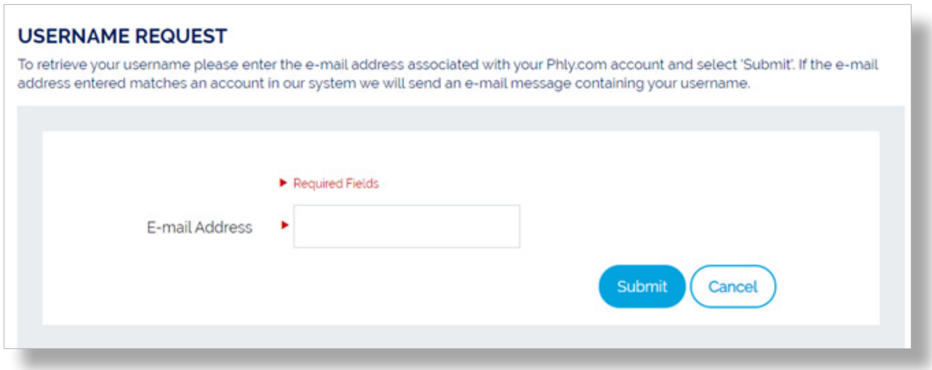
Step 2: Verify Your PIN

Please type the PIN you received here:

Submit

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.

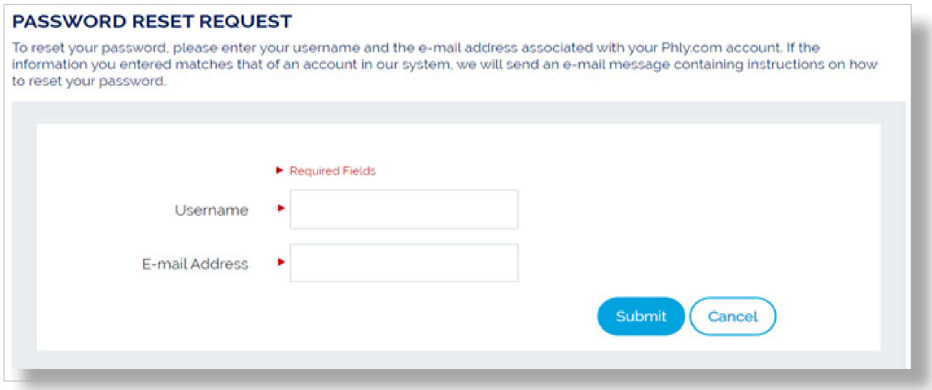
Required Fields

E-mail Address

Submit Cancel

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

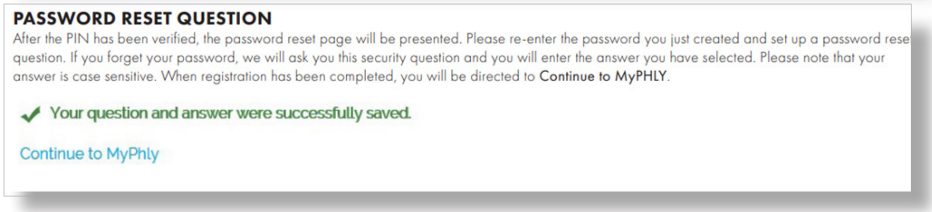
To reset your password, please enter your username and the e-mail address associated with your Phly.com account. If the information you entered matches that of an account in our system, we will send an e-mail message containing instructions on how to reset your password.

Required Fields

Username

E-mail Address

Submit Cancel



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**.

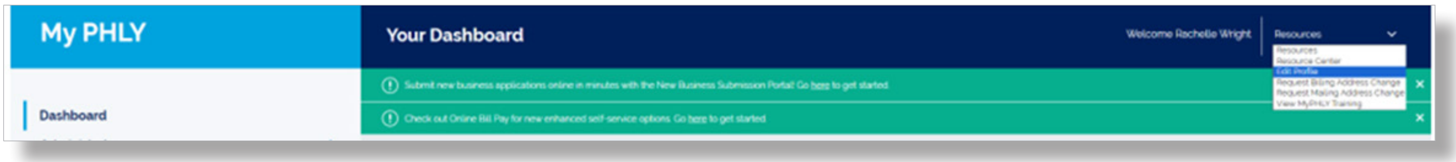
Your question and answer were successfully saved.

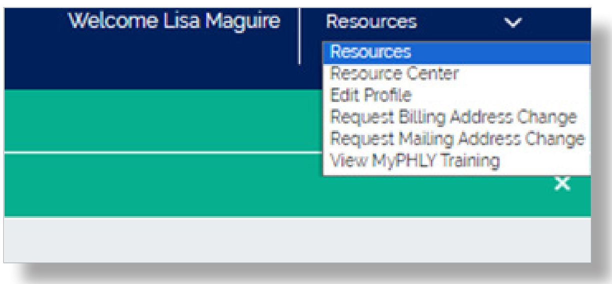
Continue to MyPhly

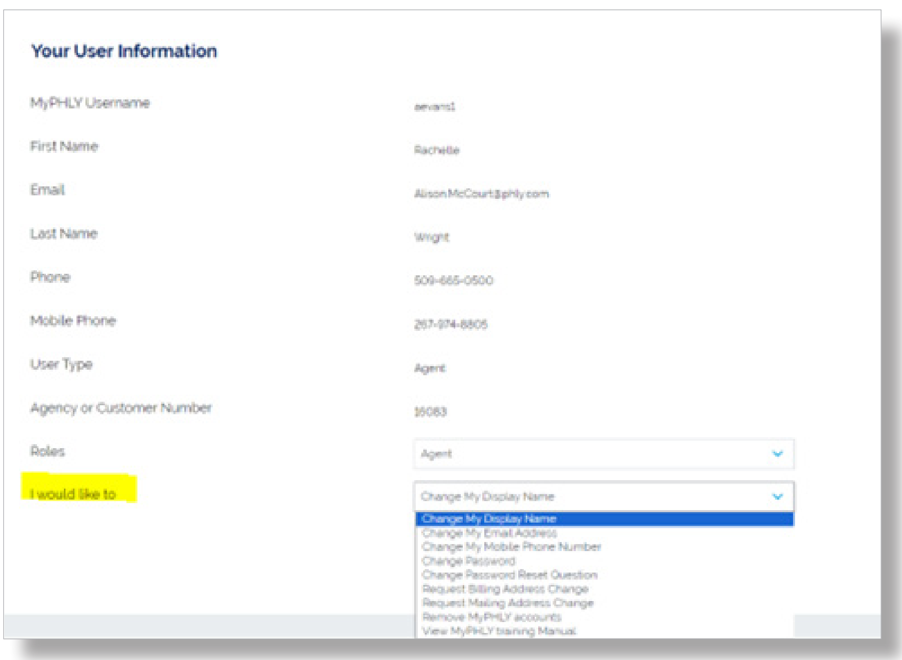
RESOURCES

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



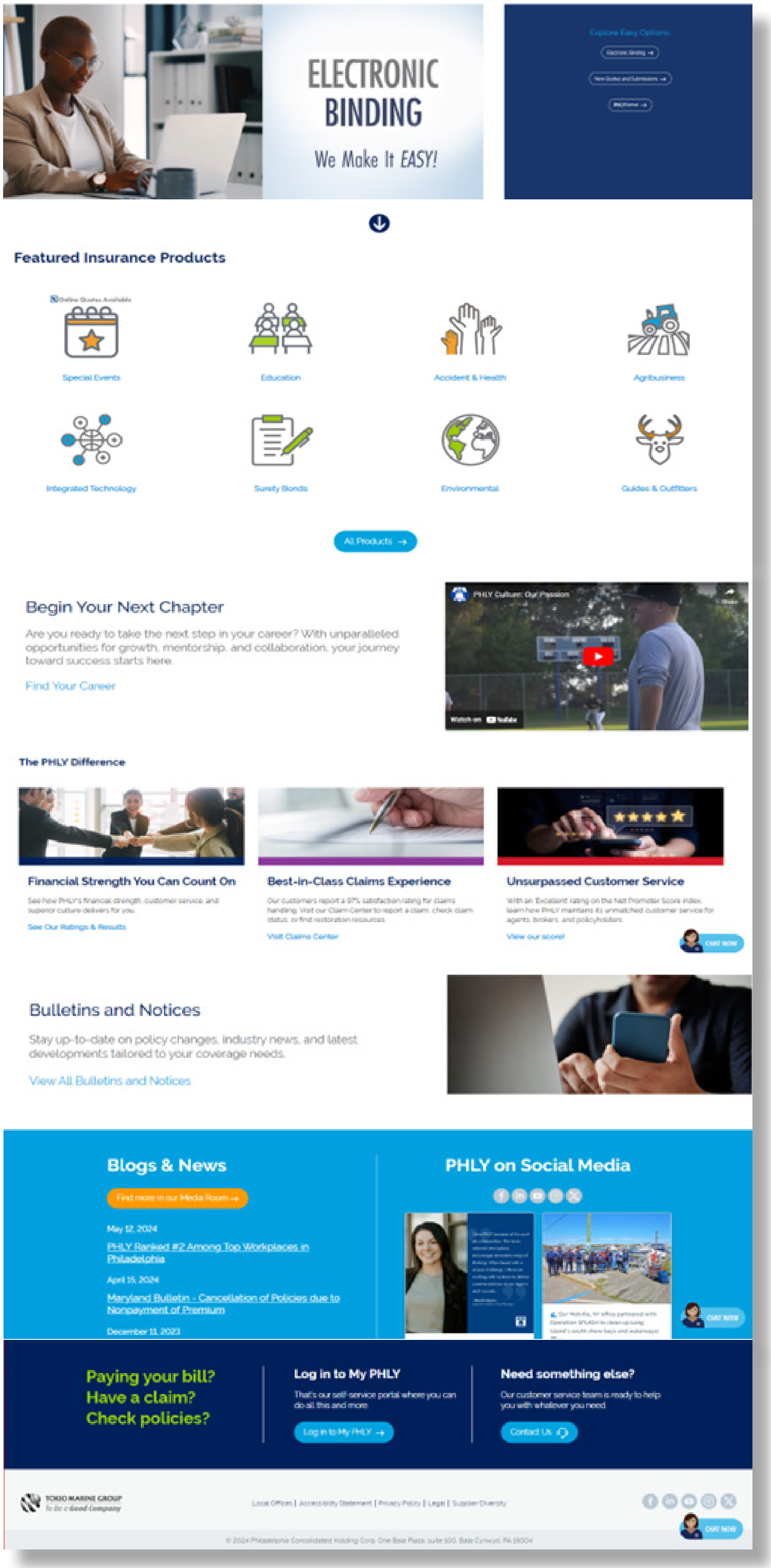




MyPHLY REGISTRATION PROCESS

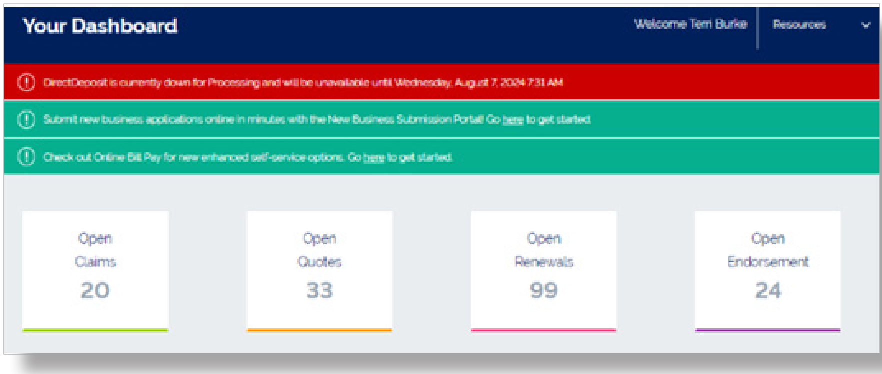
PHLY HOMEPAGE

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.



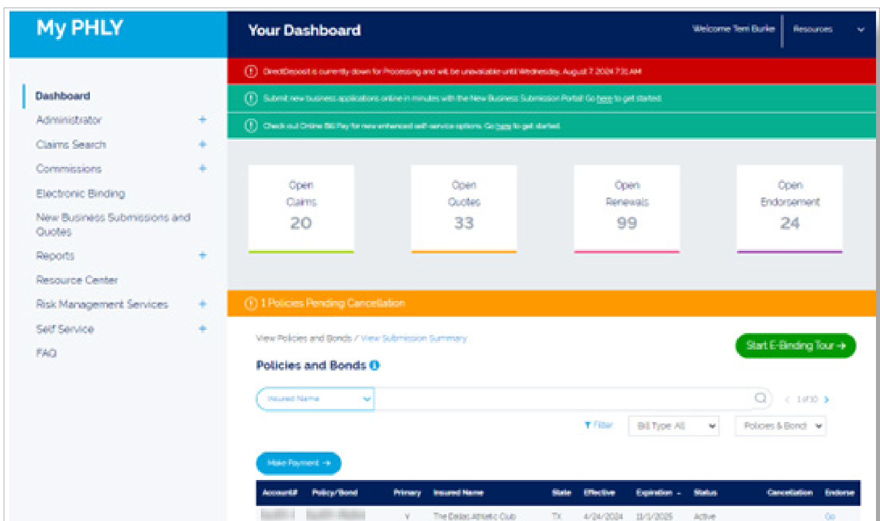
MyPHLY DASHBOARD TILES

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



MyPHLY DASHBOARD HOMEPAGE

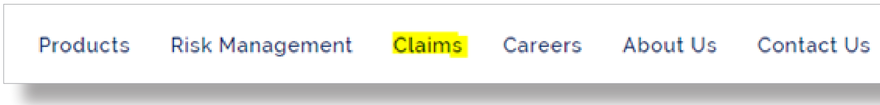
Click on the Dashboard Left Navigation Menu to access: Claims Search, Commission, Electronic Binding, New Business Submissions and Quotes, Reports, Resource Center, Risk Management Services and Self Service.

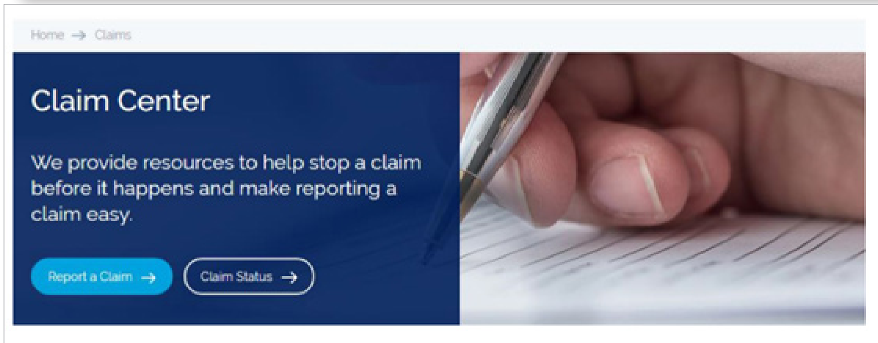


Search Policies and Bonds to locate all the policies linked to your username. Please note if you have many accounts, you may have multiple pages. You can click through each page of your accounts by clicking on the page arrow button to the right of the search bar, or you may enter in the policy information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

HOW TO REPORT A CLAIM:

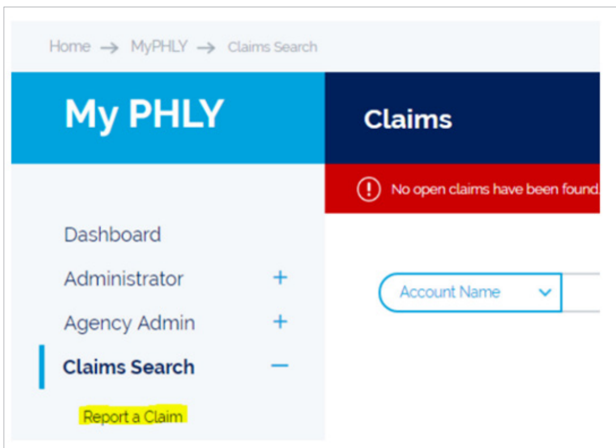
1. On the Top Navigation Menu, Click Claims
2. Click Report a Claim



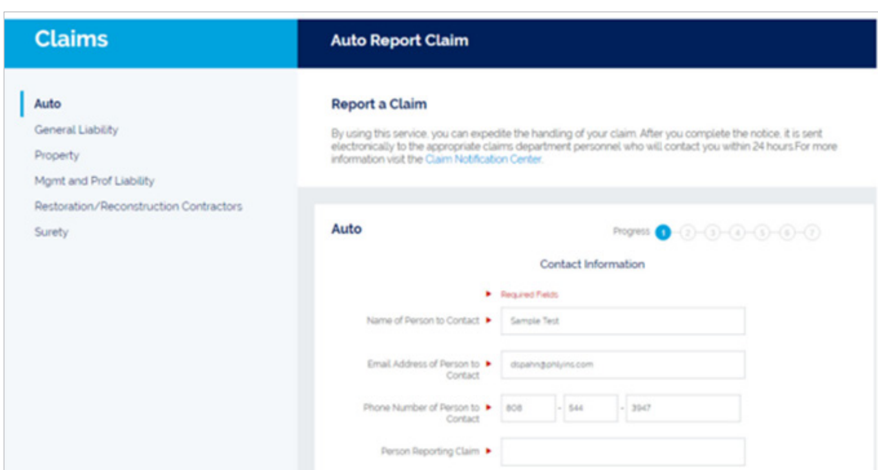


OR

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

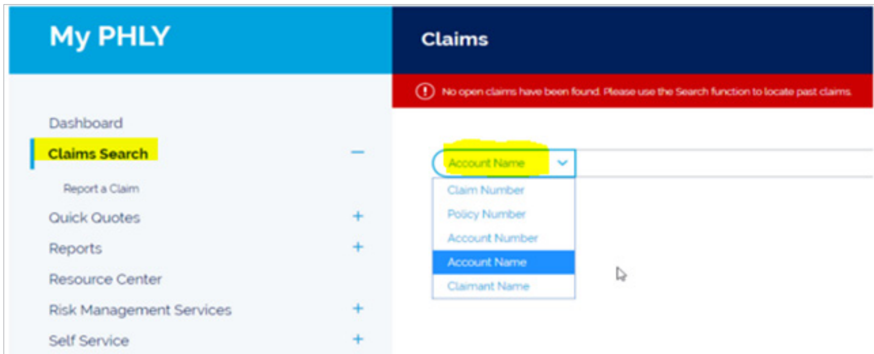


SAMPLE CLAIMS REQUEST FORM:



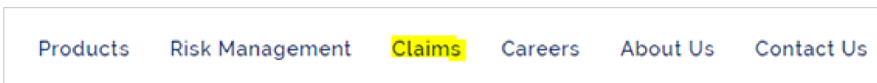
HOW TO CHECK ON CLAIMS STATUS:

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.

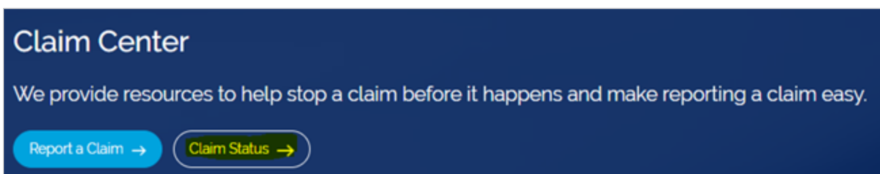


OR

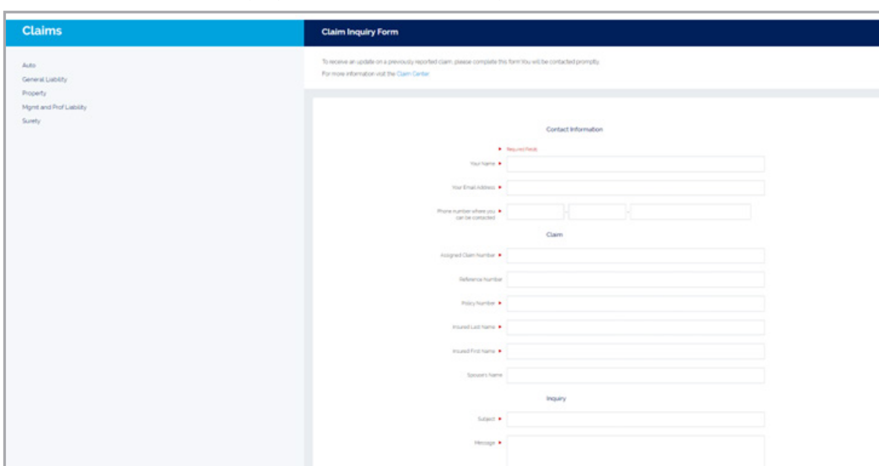
1. You can send us a claims inquiry or message via email by Click Claims at the Top Navigation Menu.



2. Click Claims Status button.



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



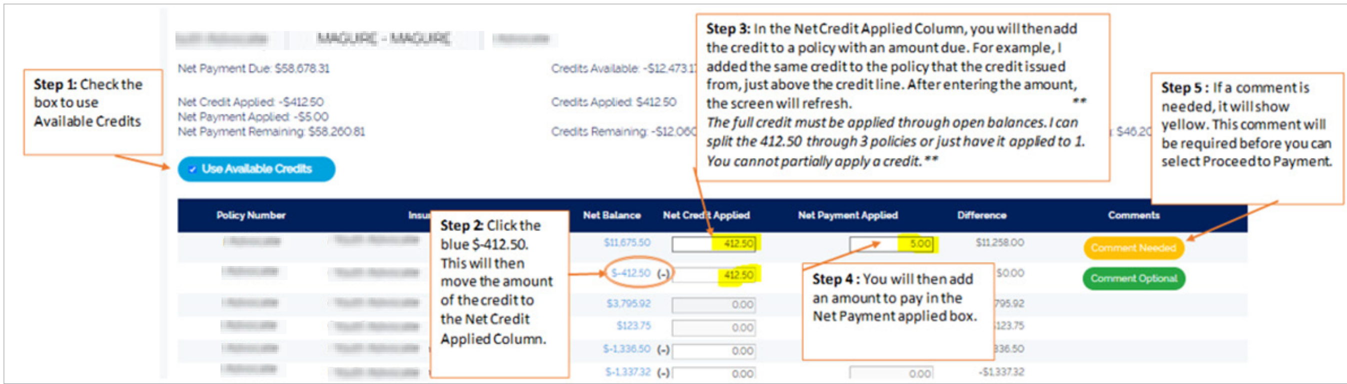
HOW TO MAKE AN AGENCY BILL PAYMENT

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

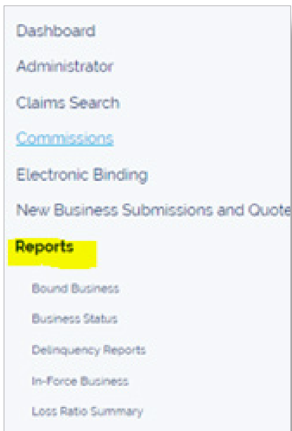
1. From the Left Navigation Menu, click on Self-Service.
2. Click Online Bill Pay to view current balances on accounts and pay bills online.

HOW TO ALLOCATE PAYMENT CREDITS TO MULTIPLE ACCOUNTS



HOW TO ACCESS REPORTS

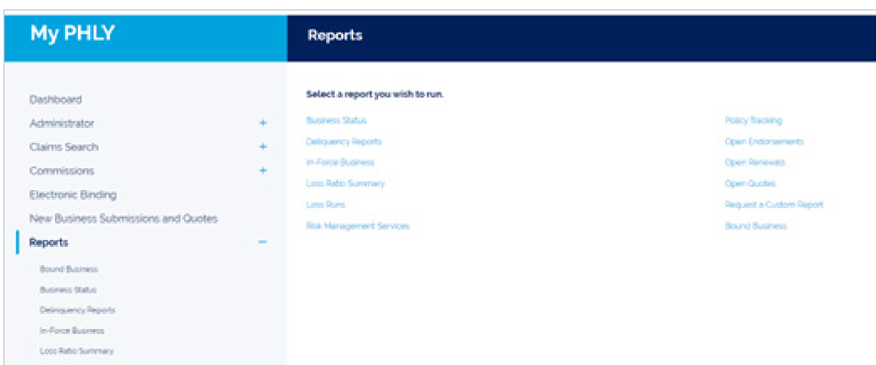
1. From the Left Navigation Menu, click Reports to view various reports that can be utilized in managing day-to-day business.



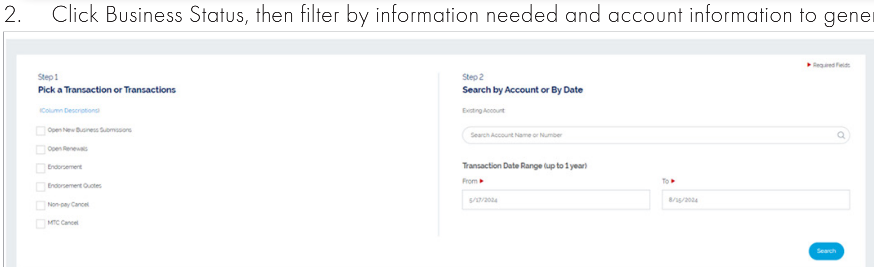
PENDING BUSINESS REPORT

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

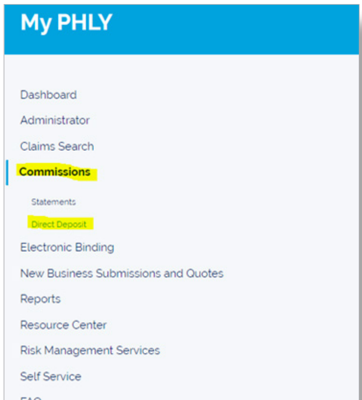
1. Click Reports from the Left Navigation Menu on the Dashboard



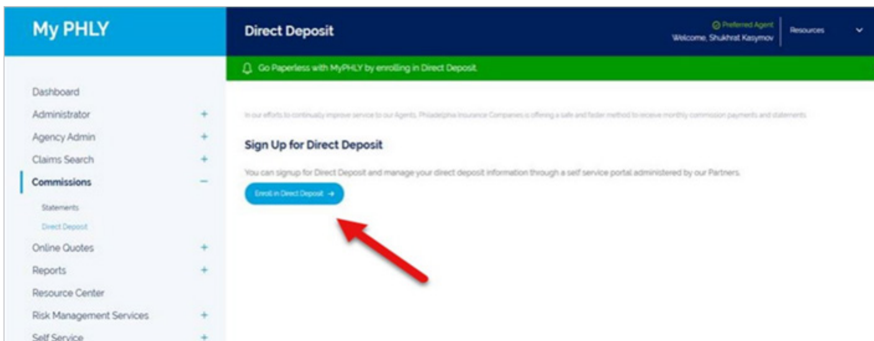
2. Click Business Status, then filter by information needed and account information to generate report.

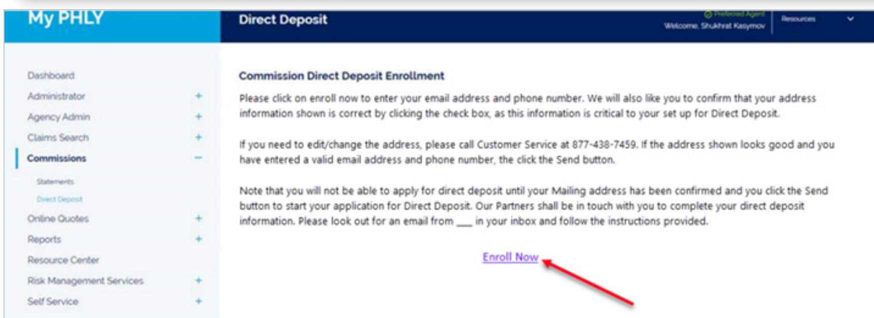


HOW TO ENROLL IN DIRECT DEPOSIT COMMISSIONS

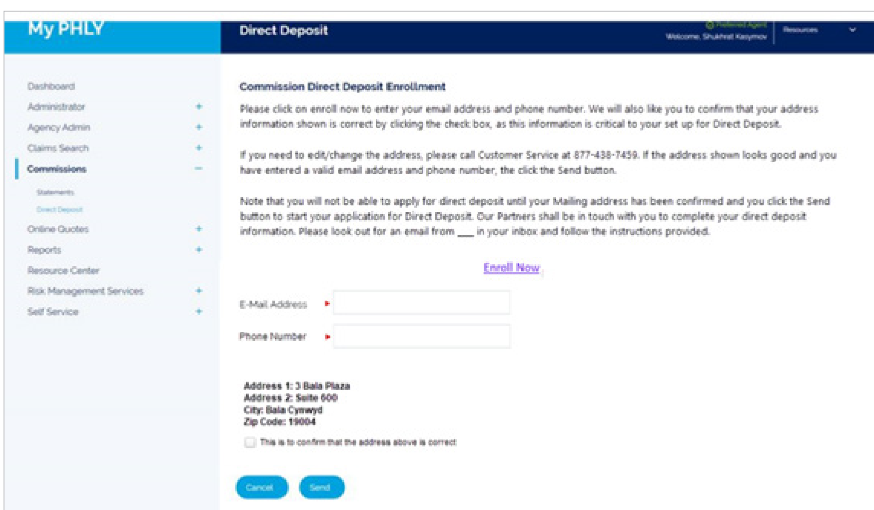


1. Click Commissions
2. Click Direct Deposit to Enroll
3. Click Enroll in Direct Deposit button
4. Click Enroll in Direct Deposit button
5. Click Enroll Now link





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



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.

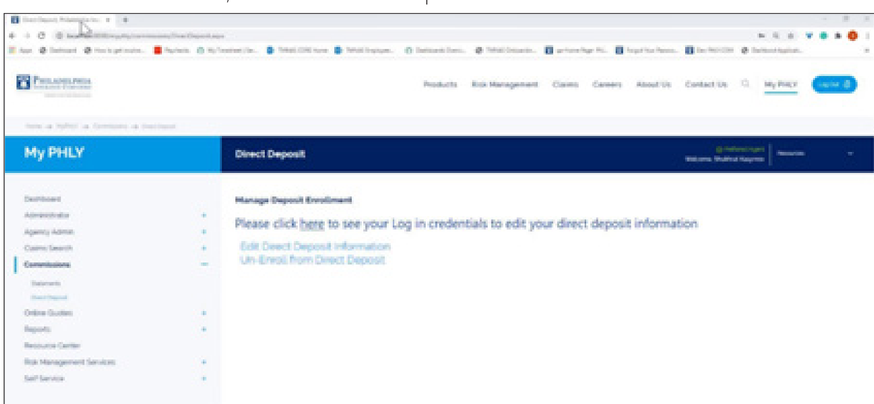
Enrollment instructions

- 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.****

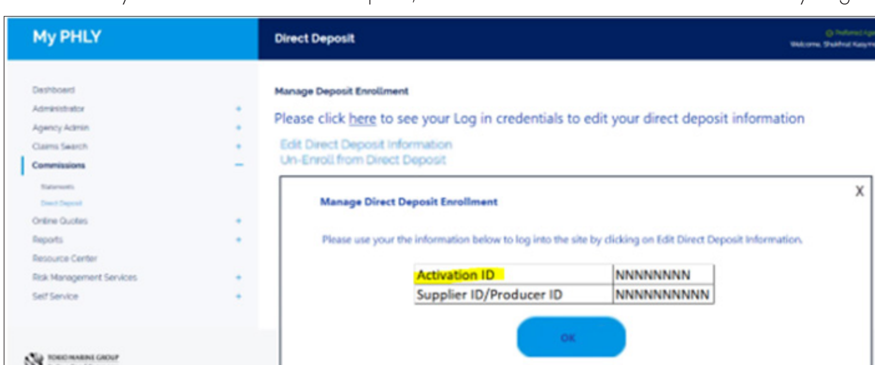
HOW TO EDIT YOUR DIRECT DEPOSIT

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

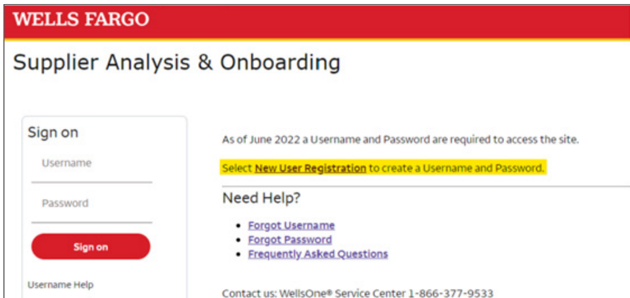


HOW TO EDIT YOUR DIRECT DEPOSIT - continued

4. Click on Edit Direct Information

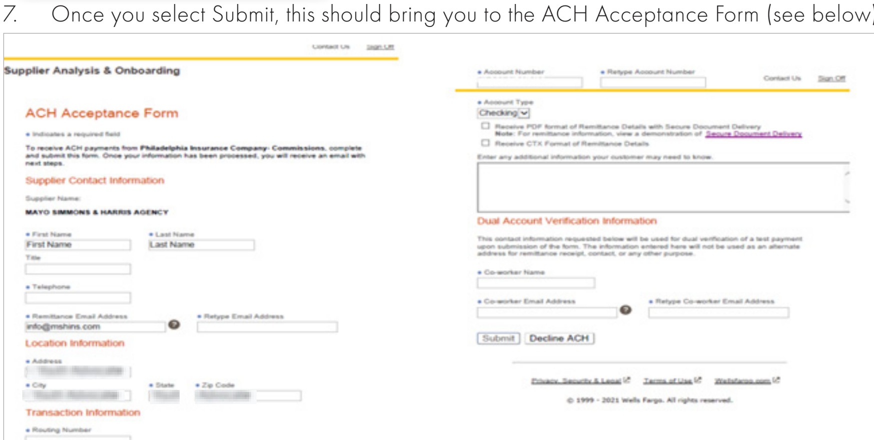
   NOTE: This will bring you to the Wells Fargo Portal to Sign in with your Username/Password and you may skip to Step 7. If you have not made any edits prior to June 2022, you will need to Select New User Registration and continue with Step 5.

5. Select New User Registration



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

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



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.

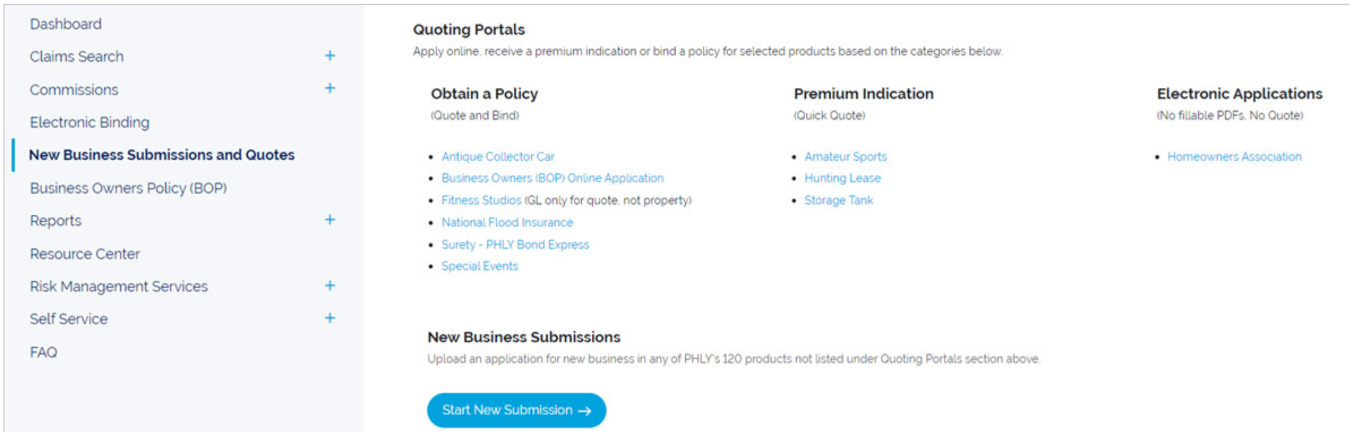
Enrollee and coworker must respond to test deposit verification email.

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

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, PHLY 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

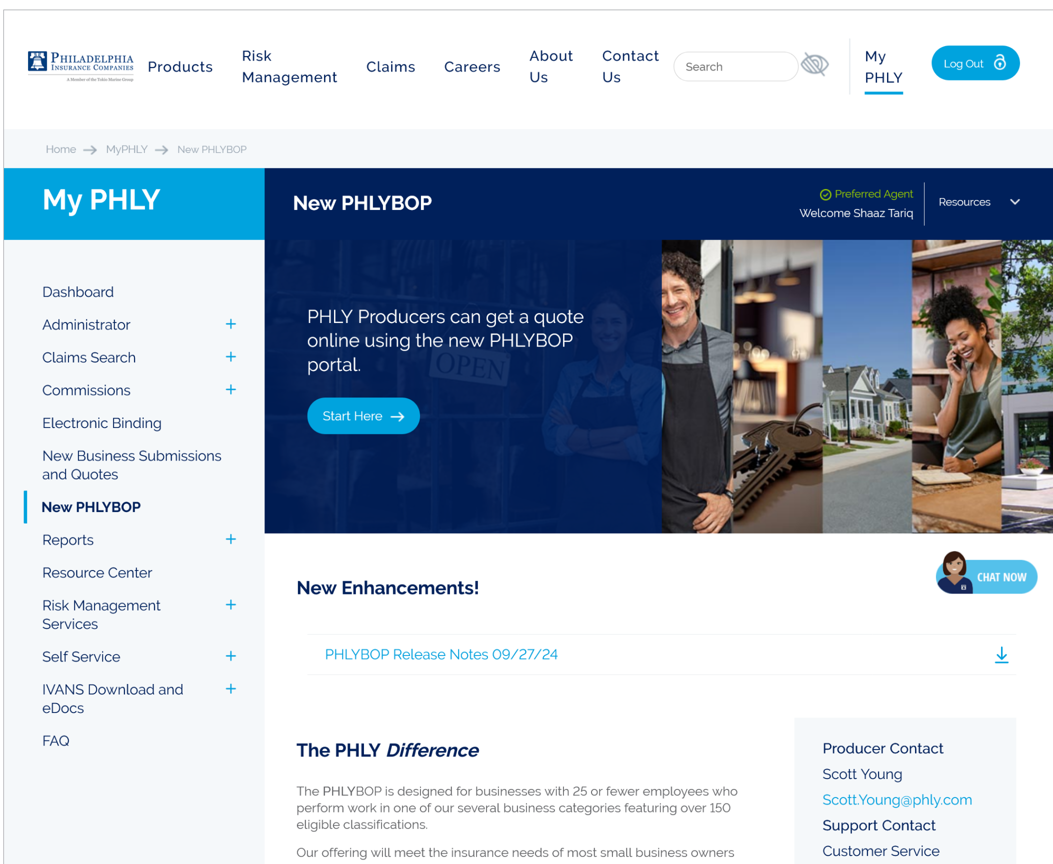


If you would like to view our full product list, Click Products at the Top Navigation Menu.

When the submission is complete, you will receive a confirmation email. A PHLY 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 **PHLY**BOP portal provides the ability to quote, bind, and issue.

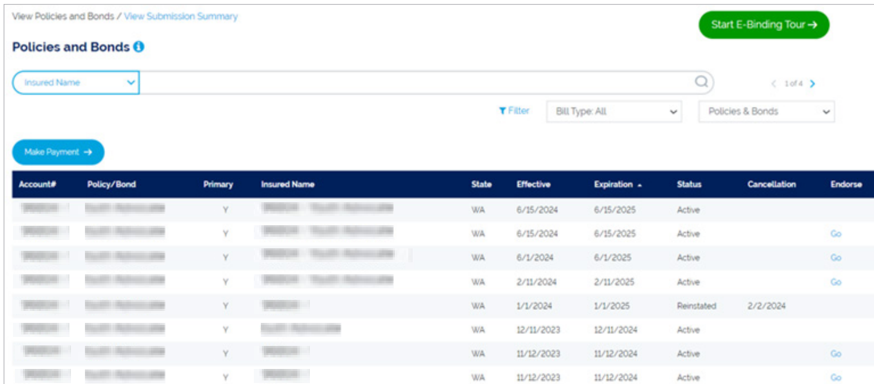


ENDORSEMENTS & MID-TERM QUOTES

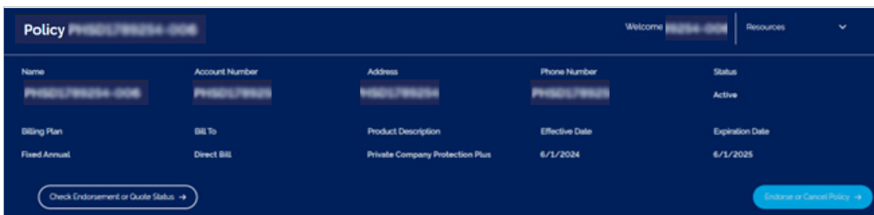
Agents can endorse or quote multiple policies associated with the same account number all at once by attaching documents to the endorsement or quote request. Your endorsement or mid-term quote request will be immediately delivered to the appropriate underwriter, which reduces processing time.

HOW TO ENDORSE OR QUOTE A POLICY

1. Go to PHLY.com and Log In to your MyPHLY.com account.
2. Review/search for Policies on the MyPHLY homepage and click Go link, to the right of the policy you wish to endorse or quote.

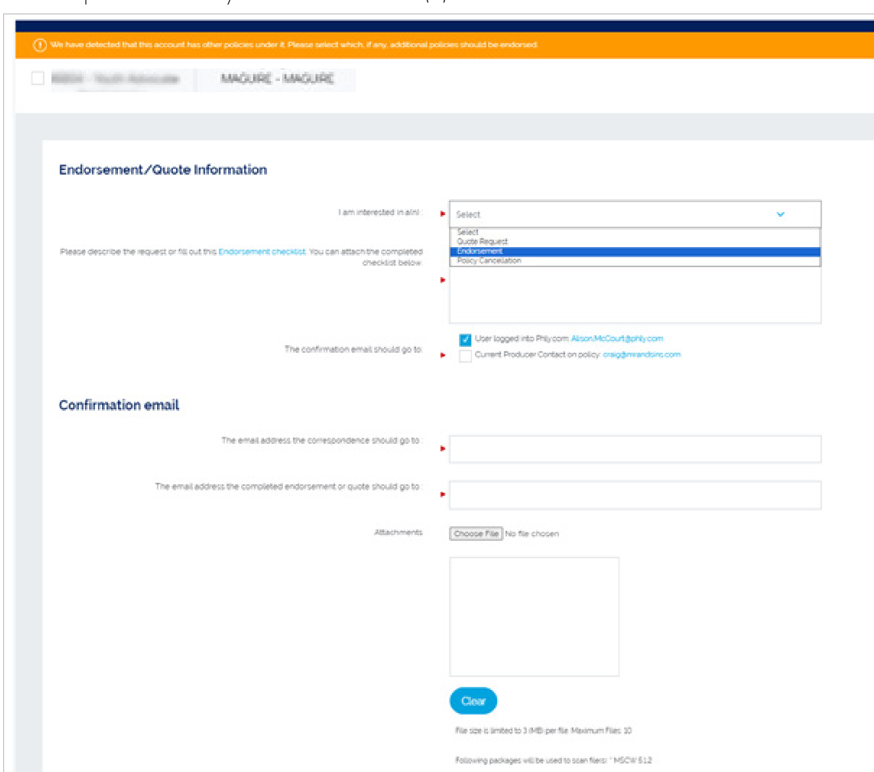


3. OR you can Click the Policy number to view it first. If you click on the policy number, then Click Endorse/Cancel Policy.



You can also check on the status of an Endorsement or Quote request by clicking Check Endorsement or Quote Status button, then clicking Display Report.

4. Fill out the endorsement/quote form and click Submit the application. You can choose a Quote Request, Endorsement or Policy Cancellation from the drop-down that says "I'm interested in a(n)".

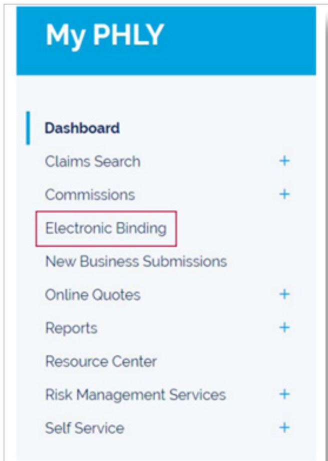


PHLY.COM BINDING CONDITIONS POP-UP REQUIREMENTS

- 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

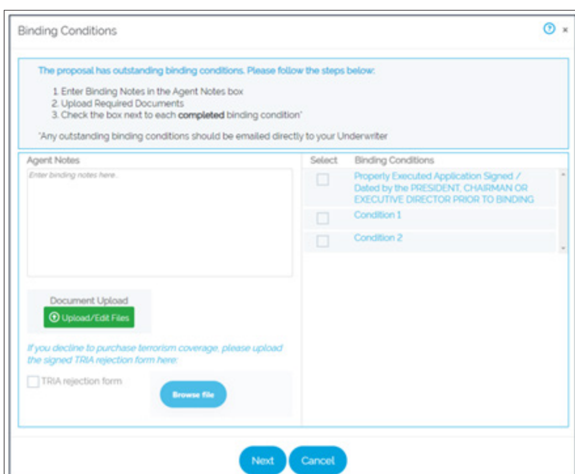
1. From the Left-side menu, click Electronic Binding

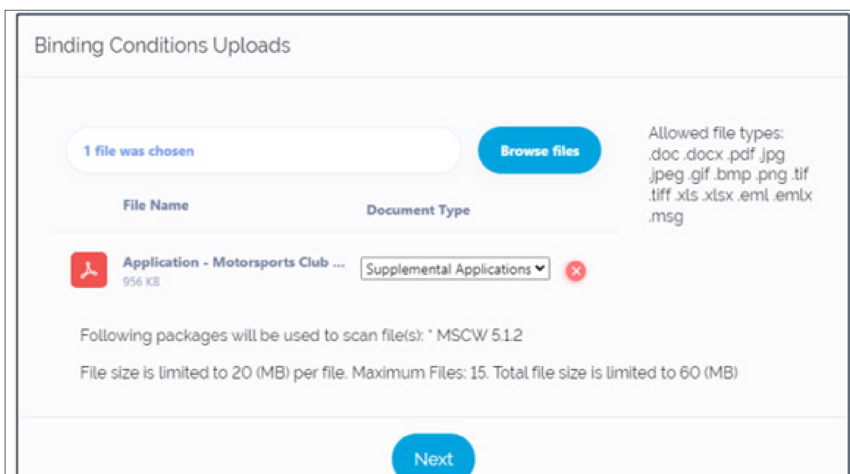


2. You will see a list of the submissions that are eligible for Electronic Binding. Click the BIND button to start the binding process.

Account Number	Submission ID	Type	Primary	Insured Name	State	Effective Date	Expiration Date	Status	Date Created
[illegible]	[illegible]	Renewal	Y	[illegible]	CA	12/21/2022	12/21/2023	Bind	7/23/2022
[illegible]	[illegible]	Renewal	Y	[illegible]	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

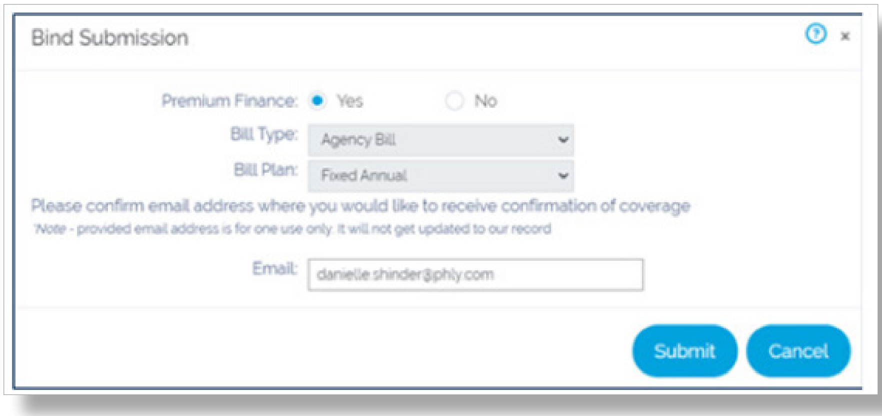




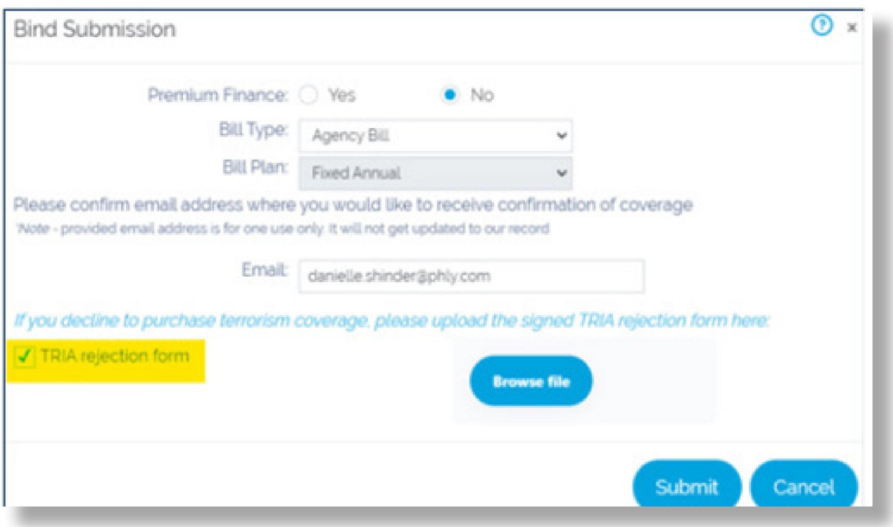
You can upload a variety of documents including word, pdf, excel, html, jpeg. Upload the documents which correspond to a particular condition, select the Doc Type you think is best suited and mark the corresponding condition. Ex: Acords, Supplemental Applications, Financial, Statement of Value, Loss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

HOW TO E-BIND A POLICY - continued

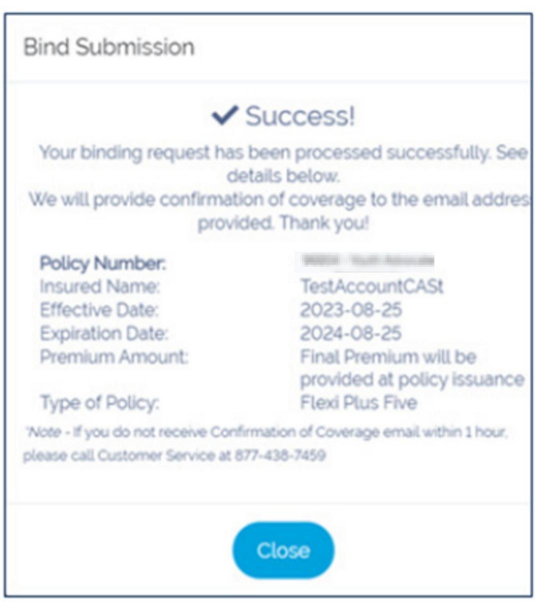
4. Once the conditions are completed, the Billing Information screen will pop up. Please enter the email address you would like to receive the Confirmation of Coverage to.



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



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



HOW TO LOGOUT

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