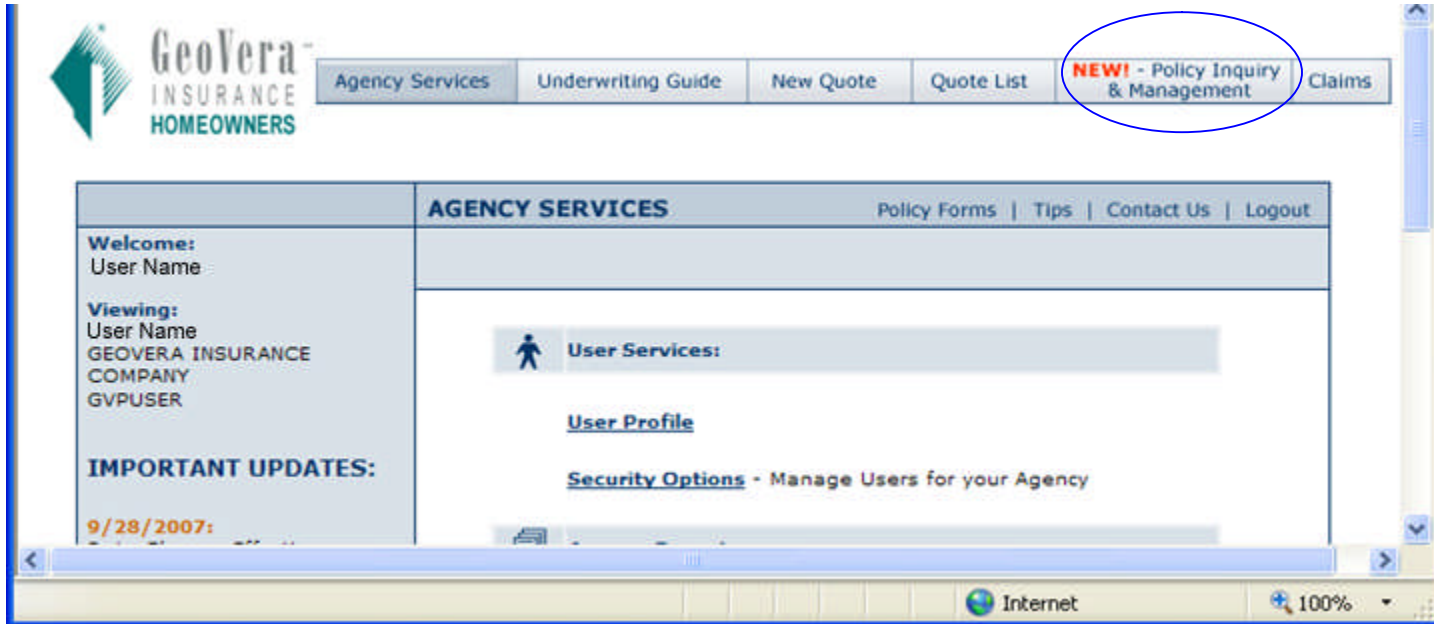
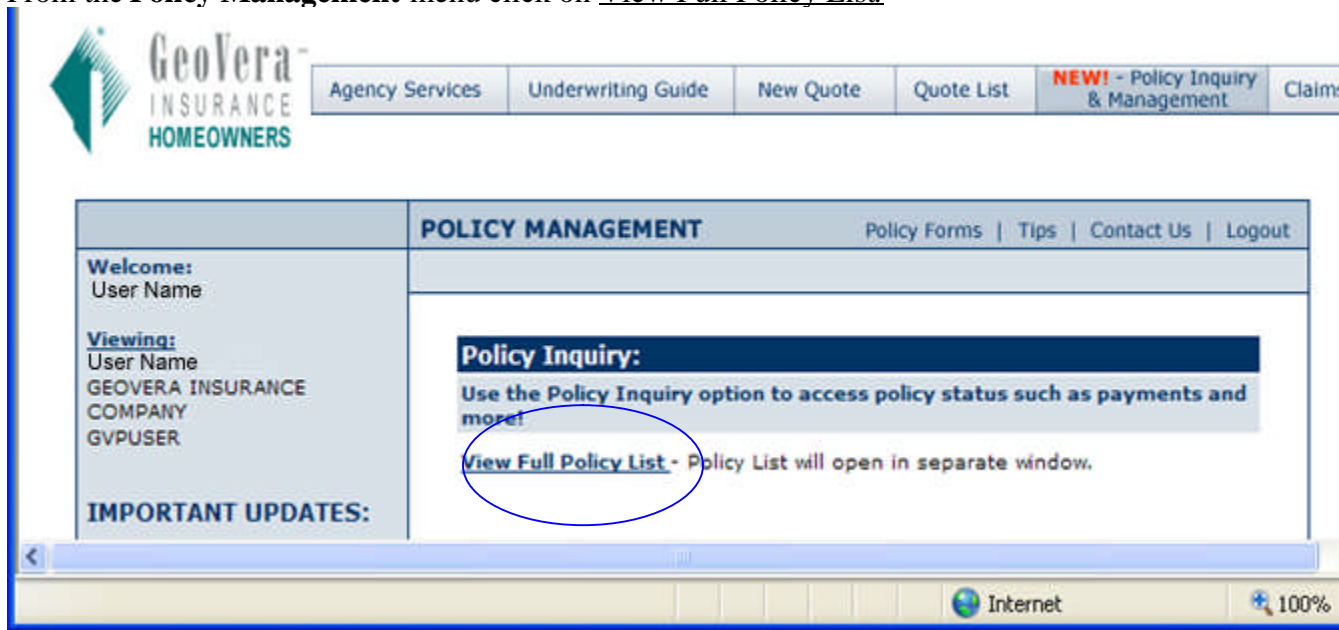


## PROCEDURES FOR ACCESSING POLICY INQUIRY INFORMATION

- Once you have logged into the quoter, select the tab in the upper right hand corner, NEW – Policy Inquiry & Management.



- From the **Policy Management** menu click on View Full Policy List.



## PROCEDURES FOR ACCESSING POLICY INQUIRY INFORMATION

- You are now in the “My GeoSource” site.
- The screen defaults to a list of your policies.
- A search for a specific policy can be done by accessing the **Policy Search** function on the left hand side of the screen. A search can be done by the policy number or insured’s last name.
- The **Out of # of records, # of records are:** to the right of the screen provides a count of policies that require pending action.
- Please note that the Default Policy list can be sorted by any of the Column Headers.

To return to the quoting website: [Close Window](#)

Welcome:  
User Name

**Policy Search:**  
Customer's last name or 10 character policy number:  
Choose Search Option:  
Policy Number  
Search For:

**Policy List:**

**Please Note:** All records are current as of Monday, February 02, 2009. Any pending policy changes will not be reflected on the policy detail.

**Out of 34 records, the following records are:**

Renewal Offer Sent:	0
Notice of Intent to Cancel Sent:	3
Non-Renewal Pending:	0

To locate these records, click the "Last Activity" column header on the Policy List below. The list will be sorted by activity.

**Default List:**

Insured Name	Policy Number	Status	Last Activity	Activity Date	City	State	Zip	Premium (incl. fees & taxes)	Payment Due Date	Amount Due
Joe Smith	VH8000001	Active	Policy Cancelled	03/12/2009	LEWISVILLE	TX	75067	\$1,026.00	None	\$0.00
John Doe	VH8000002	Active	Policy Cancelled	03/12/2009	LIBERTY HILL	TX	78642	\$1,265.00	None	\$0.00
Jane Doe	VH8000003	Active	Policy Cancelled	01/28/2009	WAXAHACHIE	TX	75165	\$1,165.00	None	\$0.00

- To view a specific policy, simply click on the Policy Number or input the policy number or insured’s last name in the **Search For:** box on the left hand side of the screen.
- Selection of the policy number link will display the details of the policy coverage as well as account status, including last payment information located in the box to the right of the screen.

# PROCEDURES FOR ACCESSING POLICY INQUIRY INFORMATION



Policy Management    Agency Reports

To return to the quoting website: [Close Window](#)

---

Welcome!  
User Name

**Policy Search:**  
Customer's last name or 10 character policy number

Choose Search Option:  
Policy Number

Search For:

Please Note: All records are current as of Sunday, April 13, 2008. Any pending policy changes will not be reflected on the policy detail.

Activity Snapshot:		Billing & Payment Info:	
Name:	John Smith	Bill To:	Mortgagee
Property Address:	123 Main Street	Pay Plan:	Full Pay
Policy Number:	VH0000000	Last Payment Received:	\$1,196.00 on 7/20/2007
Last Activity:	Renewal	Payment Method:	Check
Activity Date:	3/29/2008	Payment Due:	None
		Outstanding Balance on Current Term:	\$0.00

Policy Details:	
Status:	Active
Co-Insured:	Jane Smith
Mailing Address:	123 Main Street
Primary Phone:	222-222-2222
Secondary Phone:	333-333-1234
Email:	email@email.com
Product:	HO B Homeowners
Effective Date:	7/21/2007
Expiration Date:	7/21/2008 12:01 AM Standard Time at the Insured Premises

Policy Limits:	
A - Dwelling:	\$175,000
B - Personal Property:	\$105,000
C - Personal Liability:	\$300,000
D - Medical Payments to Others:	\$5,000
Loss of Use:	\$35,000
Off Premises Personal Property:	\$10,500
Other Structures:	\$17,500
Deductible(s):	
Clause 2 Deductible:	\$1,750 (1%)
Clause 1 Deductible:	\$1,750 (1%)
Premium Information:	
Premium:	\$1,206.00
Total:	\$1,206.00
Mortgagee Details:	
Mortgagee:	PO BOX 12345 FAIRFIELD, CA 94534
	<b>Mortgagee Bill: Yes</b>
Agent Information:	
Wholesaler:	Wholesale Broker
Agent:	Agent1
Agent Number:	Agent123
Address:	123 MAIN ST FAIRFIELD, CA 94534
Phone:	

- To return to the quoter, click on the “Close Window” button located at the top right hand side of the screen.

# PROCEDURES FOR ACCESSING POLICY INQUIRY INFORMATION

