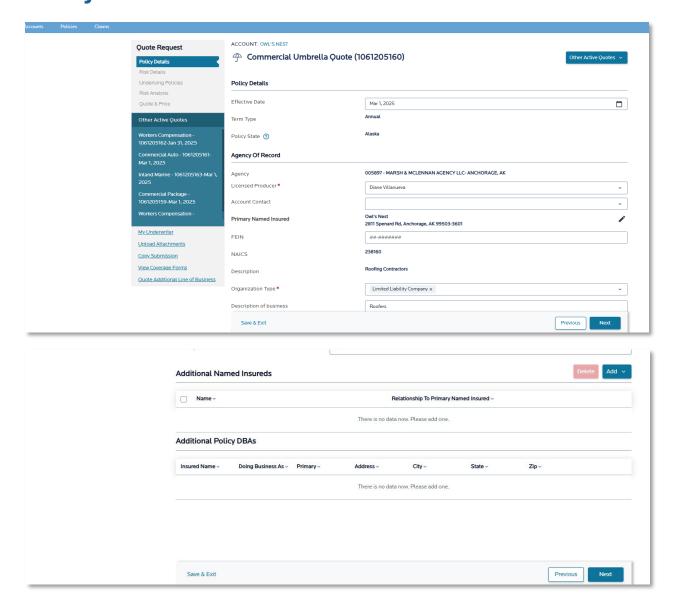


# **ProducerEngage Guide**

Umbrella

The relationship company

# **Policy Details**

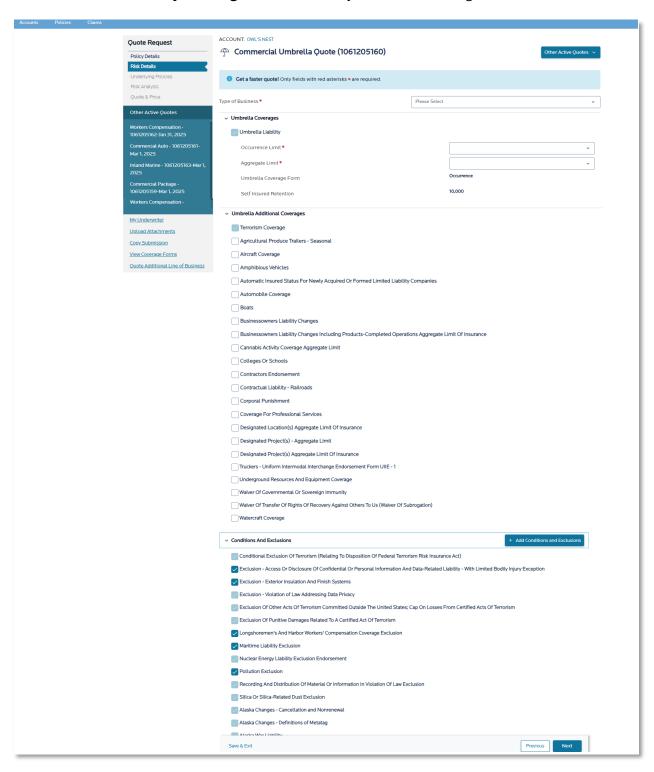




#### **Risk Details**

#### Choose Type of Business

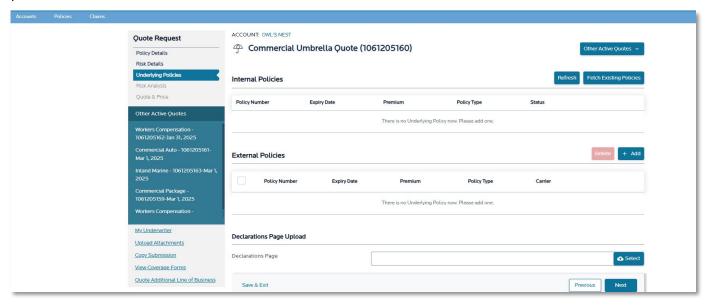
Select "Umbrella Liability Coverage" and choose any additional coverages and / or conclusions / exceptions.





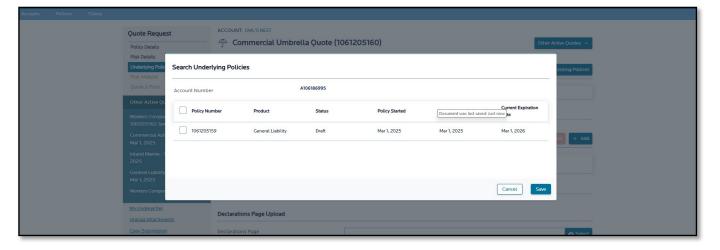
### **Underlying Policies**

To add internal policies, go to the right side and select "**Fetch Existing Policies**". This will bring in existing underlying policies with Umialik.



## **Search Underlying Policies**

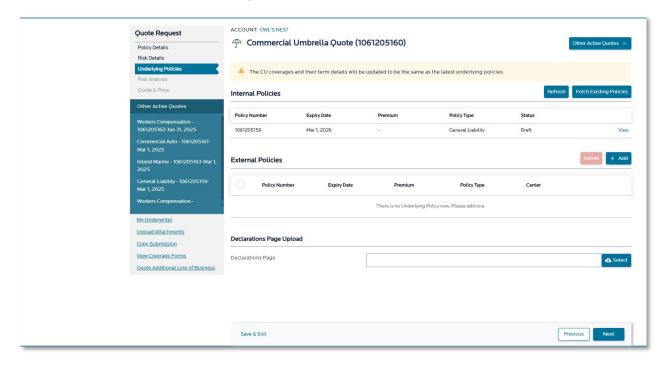
If the underlying policy is a quote with exposures, it should be able to be selected. Put a **check in the check box** for the policy and click "Save".



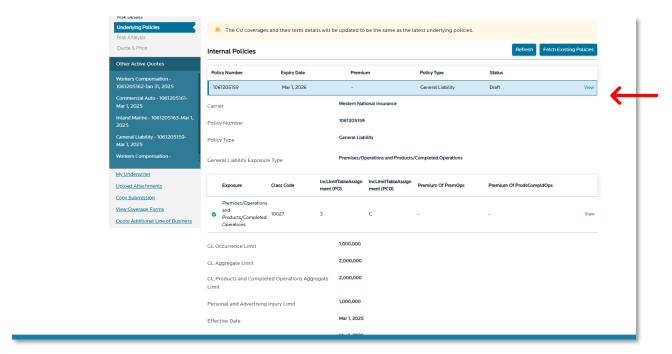


### **Underlying Policies Continued**

Now the internal policies are showing.

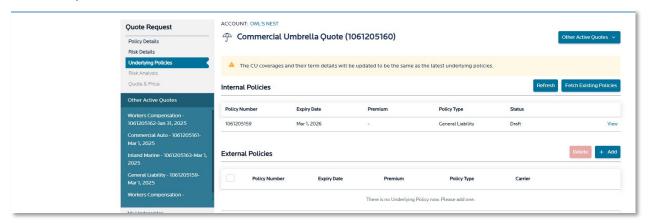


The underlying policies can be viewed to see more detail about the policy by selecting "**View**". It opens the details of the policy, including exposure type, class code, coverage limits, and more.

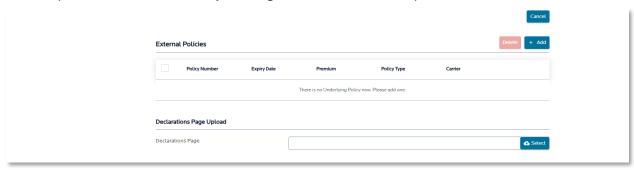




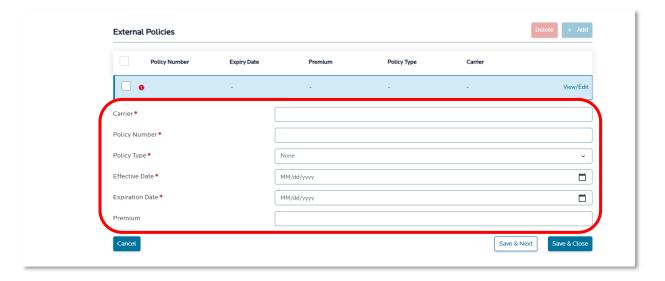
There is a "**Refresh**" button (next to "Fetch Existing Policies") to be used when changes are made to the underlying policies. By clicking on "Refresh", it allows the underlying internal policies to be updated in the Commercial Umbrella quote.



External policies can be entered by clicking on the Add button for policies that are with another carrier.



Add all fields for the external policy and select "Save & Close".





# **Declarations Page Upload**

If there is an external policy, upload the declarations page here by clicking on "Select". Upload the file and select "Next".



