

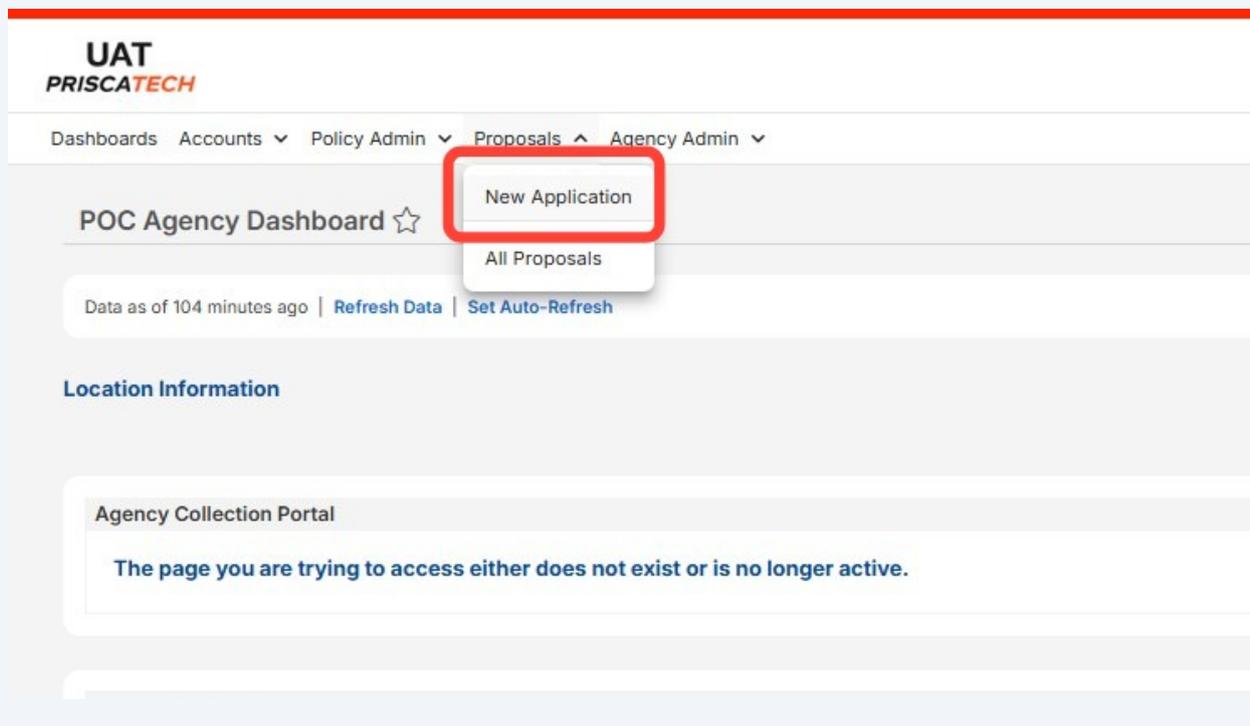
# REIP: New Application Process 1.29.26



This guide offers a comprehensive walkthrough of the new application process for creating accounts in Priscatech, ensuring users can navigate the steps efficiently. It highlights essential features like automatic date population, address lookup, and contact management, making the process user-friendly.

1

At the top of the homepage, open the *Proposals* menu and click the *New Application* button.



2

Use the calendar icon to choose the Effective Date. The system will automatically populate the Expiration Date, along with your Agency and Agent information.

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Dashboards Accounts Policy Admin Proposals Agency Admin

Agent Information (Page 1 of 8) Continue > Cancel

**IMPORTANT**  
Complete all required fields.\*

**Effective Dates**  
Effective Date: \*    
Expiry Date: \*

**Agency and Agent Information**  
Agency: \*    
Agent: \*

Continue >

**Interview Pages**  
Agent Information  
Account Information  
Account Contact Information  
Location Information  
Location Information - Additional Questions  
Check Application for Issues  
Payment Options  
Confirmation Page

3

After you enter the effective date, click *Continue*.

Agent Information (Page 1 of 8) Continue > Cancel

**IMPORTANT**  
Complete all required fields.\*

**Effective Dates**  
Effective Date: \*    
Expiry Date: \*

**Agency and Agent Information**  
Agency: \*    
Agent: \*

Continue >

**Inter**  
Agen  
Accoi  
Accoi  
Locat  
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4

Note: This workflow is for creating *new* accounts only. To add locations to an existing account, use the *Add New Location(s)* button on the policy screen.

Account Information (Page 2 of 8)

< Go Back

Reject Proposal



**IMPORTANT**

This workflow is intended for setting up new accounts only. If you need to add locations to an existing account, please use the "Add New Location(s)" button from the existing account policy screen.

**New Account Information**

Account Type

Entity Type: \*

Override Address:

Street: \*

City: \*

State: \*

Postal: \*

**Primary Contact Information**

First Name: \*

Last Name: \*

Email: \*

Phone: \*  ext.

**Primary Contact Roles:**

Primary Contact:

Admin:

Billing Contact:

Partner:

5

Enter all required details for the new account—Entity Type, First and Last Name, Address, and any other needed fields. Start typing the address to trigger the lookup feature.

Account Information (Page 2 of 8)

< Go Back

Reject Proposal



**IMPORTANT**

This workflow is intended for setting up new accounts only. If you need to add locations to an existing account, please use the "Add New Location(s)" button from the existing account policy screen.

**New Account Information**

Account Type

Entity Type: \*

First Name: \*

Last Name: \*

Override Address:

Street: \*

City: \*

State: \*

Postal: \*

**Primary Contact Information**

First Name: \*

Last Name: \*

**Primary Contact Roles:**

Primary Contact:

Admin:

6

Enter the required Primary Contact Information. The Primary Contact role is assigned automatically. You can add additional roles if needed.

Override Address:

Street1: \*

City: \*

State: \*

Postal: \*

**Primary Contact Information**

First Name: \*

Last Name: \*

Email: \*

Phone: \*  ext

Preferred Contact Method: \*

**Primary Contact Roles:**

Primary Contact:

Admin:

Billing Contact:

Partner:

Property Manager:

**Secondary Contact Information**

Do you wish to add a secondary contact?

7

You can add Secondary Contact Information by repeating the previous steps, or click *Continue* to move on.

**Primary Contact Information**

First Name: \*

Last Name: \*

Email: \*

Phone: \*  ext

Preferred Contact Method: \*

**Secondary Contact Information**

Do you wish to add a secondary contact?

Continue >

8

Review contact information by clicking a name on the left, or add new account contacts using the blue plus icon on the right. To continue without changes, click *Continue*.

Dashboards Accounts Policy Admin Proposals Agency Admin

Account Contact Information (Page 3 of 8) < Go Back Reject Proposal Continue > Cancel

**Review and Add Remaining Account Contacts**

Name	Contact Type	Title	Email	Work Phone	Role	
Agent1, Test	Account Contact		jeromey@nreig.com	(555) 555-5555	Primary Contact	✖

+ New Account Contact Show All

Continue >

Inter  
Age  
Acc  
Acc  
Loc:  
Que  
Che  
Pay:  
Con

9

To add Location information, click + *New Location*.

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Dashboards Accounts Policy Admin Proposals Agency Admin

Location Information (Page 4 of 8) < Go Back Reject Proposal Continue > Cancel

**Property Information**  
Please provide all information requested below about each individual property.\*

**Location Records**

Location Number	Name	Street1	City	State	Postal Code	
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+ New Location Show All

Upload Locations via Spreadsheet?  ⓘ

Continue >

Inter  
Agen  
Acco  
Acco  
Loca  
Local  
Ques  
Chec  
Paym  
Confi

10

Start typing the address in the Street1 field and choose the correct option from the dropdown. Then click *Save Changes* to proceed.

The screenshot shows a web application interface for 'New Location Schedule'. At the top, there are navigation tabs: 'Dashboards', 'Accounts', 'Policy Admin', 'Proposals', and 'Agency Admin'. The main form area is titled 'New Location Schedule' and contains an 'Address Information' section. This section includes a checkbox for 'Override the address?' and several input fields: 'Street:', 'City:', 'State:', 'Postal Code:', and 'County:'. A red box highlights the 'Street:', 'City:', 'State:', 'Postal Code:', and 'County:' fields. A red arrow points from the 'Save Changes' button at the top right of the form to the 'Street1' field.

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You can add another Location, or simply click *Continue* to continue.

The screenshot shows a web application interface for 'Property Information'. At the top right, there is a vertical navigation menu with links: 'Acco', 'Loca', 'Local', 'Ques', 'Chec', 'Paym', and 'Conf'. The main content area is titled 'Property Information' and includes a sub-header 'Location Records'. Below this is a table with columns: 'Location Number', 'Name', 'Street1', 'City', 'State', and 'Postal Code'. A yellow box highlights the '+ New Location' button at the top right of the table. A yellow arrow points from the '+ New Location' button to the 'Continue >' button at the bottom left of the page.

Location Number	Name	Street1	City	State	Postal Code
1121521-0001	8418 Summit St	8418 Summit St	Kansas City	Missouri	64114

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Click the *Location Number* link to add Property Information.  
Note: The 'Information Updated' section will appear yellow while required details are missing, and will turn green once everything is complete.



**Property Information**

Please UPDATE all information requested below about each individual property.\*

**Location Records**

Sho

Information Updated	Location Number	Name	Payment Option	Street1	City	State	Postal Code	Total Value
	1121521-0001	8418 Summit St		8418 Summit St	Kansas City	Missouri	64114	

Continue >

13

Enter the required Property Details, including Type, Status, and Number of Stories. The Year Built will auto-populate.

Kansas City

County: \*

Jackson

> Hazard Hub Information

**Property Details**

Type: \*

Single Family ^

Square Feet ⓘ

759

Override Square Feet?

- None Selected - v

Construction Type:

- None Selected - v

Status: \*

- None Selected - v

Number of Stories: \*

Year Built: \*

1945 v

Year Roof:

- None Selected - v

Year Electric:

- None Selected - v

Year Plumbing:

- None Selected - v

Year HVAC:

- None Selected - v

**Property Coverage**

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Select *Yes* in the dropdown to enable Property Coverage, then provide the required details (Form, Deductible, Valuation Type, Building Limit, etc.). The ITV will calculate automatically based on your Building and Renovation Budget.

**Property Coverage**

\* Yes

Coverage Form (Cause) \* Special

Named Windstorm: \* Included

Ordinance or Law <sup>?</sup>

Deductible (AOP) \* 5,000

Valuation Type: \* RCV

Building Limit: \* 240,000.00

Loss of Rents Limit: \* 12,000.00

Contents Limit: \* 0.00

Other Structure Limits: \* 0.00

Total Value: 252,000.00

Total Sq Ft: 759

ITV <sup>?</sup> 316.21

The ITV will auto calculate using the Building and Renovation Budget entered.

15

Select *Yes* in the dropdown to add Liability Coverage, then choose the appropriate Liability Limit.

Contents Limit: \* 0.00

Other Structure Limits: \* 0.00

Total Value: 252,000.00

Total Sq Ft: 759

ITV <sup>?</sup> 316.21

**Liability Coverage**

\* Yes

Liability limit: \* \$1M per occurrence / \$2M ^

**Tenant Protector Plan**

<sup>?</sup> \* No

**Earth Movement Coverage**

<sup>?</sup> \* No

**Flood Coverage**

<sup>?</sup> \* No

**Equipment Breakdown Coverage**

<sup>?</sup> \* No

**Property Management Errors & Omission**

<sup>?</sup> \* No

**Service Line Coverage**

<sup>?</sup> \* No

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Choose any applicable Ancillary Product to add to the policy. Keep in mind that some products will require extra information like a coverage limit.

**Liability Coverage**

\* Yes

Liability limit: \* \$1M per occurrence / \$2M

**Tenant Protector Plan**

\* Yes

TPP limit: \* - None Selected -

Would you like to include Skip Rent, Sewer and Drain Backup, and Contents Coverage to your TPP? \*  Yes  No

**Earth Movement Coverage**

\* No

**Flood Coverage**

\* No

**Terrorism Coverage**

\* Yes

**Equipment Breakdown Coverage**

\* No

**Property Management Errors & Omissions Coverage**

\* No

**Service Line Coverage**

\* No

**Detached Structure Information**

Are there any detached structures on the property? \*

Yes

No

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Answer Yes or No for detached structures and property management. Selecting Yes will prompt additional questions.

**Detached Structure Information**

Are there any detached structures on the property? \*

Yes

No

**Property Manager Information**

Is this location professionally managed? \*

Yes

No

**Location Contacts**

Name	Contact Type	Title	Email	Work P
------	--------------	-------	-------	--------

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If applicable, add any Location-Level Contacts—such as Property Managers, Lenders, or Additional Insureds. Then select Yes or No for the Lender Paid option.

Is this location professionally managed? \*

Yes

No

Does the property owner self-manage this property? \*

Yes

No

**Location Contacts** 

Name	Contact Type	Title	Email	Work Phone	Role
------	--------------	-------	-------	------------	------

**Lender Paid: \***

**Location Eligibility Questions**

Subject To: \*

Yes

No

Tenants Subsidized % \*

Is this lender placed coverage or a non performing note? \*

Yes

No

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Fill out the required Location Eligibility Questions.

**Location Eligibility Questions**

Subject To: \*

Yes

No

Tenants Subsidized % \*

Is this lender placed coverage or a non performing note? \*

Yes

No

Does the lender require Lenders Loss Payee? \*

Yes

No

Type of wiring present for the current electrical system? \*

Does the property have an elevator, lift or hoist on premises? \*

Yes

No

Is this property owner occupied or intended as a primary residence for the owner? \*

Yes

No

Is the property on stilts (not including crawlspaces)? \*

Yes

No

Is location greater than 2 stories? \*

20 Complete all required Additional Property Questions.

No

**Additional Property Questions**

Are any commercial operations occurring on the premises? \*

Yes

No

Does any commercial cooking occur on the premises? \*

Yes

No

Is there a pool, hot tub, and/or spa at this location? \*

Yes

No

Is the porch or roofline sagging? \*

Yes

No

Are functioning smoke detectors installed? \*

Yes

No

Unknown

21 Choose *Save Changes* to proceed.

Save Changes More Cancel

State: \*  
Missouri

Postal Code: \*  
64114

County: \*  
Jackson

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If everything is entered correctly, the Location Information Updated bar will turn green. You can then click *Continue* or select the Location Number again to make updates.

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Location Information - Additional Questions (Page 5 of 8) < Go Back Reject Proposal Continue > Cancel

**Property Information**  
Please UPDATE all information requested below about each individual property.\*

**Location Records** Show All

Information Updated	Location Number	Name	Payment Option	Street1	City	State	Postal Code	Total Value
✓	1121521-0001	8418 Summit St	Insured Monthly	8418 Summit St	Kansas City	Missouri	64114	252,000.00

Continue >

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Page 6 checks for any duplicate addresses in the system. If Clearance passes, click *Continue* to proceed."

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Check Application for Issues (Page 6 of 8) < Go Back Reject Proposal Continue >

**Clearance Passed**  
No duplicates have been found for the location information entered. Confirm and continue the application.

Continue >

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Choose how the client will pay for the location and startup fees. Your selection determines which fee is added to the total: ACH adds \$1, Credit Card adds 3%, and Check adds \$5.

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Payment Options (Page 7 of 8) < Go Back Reject Proposal Continue > Cancel

Do you want to pay 12 months and the one time setup fee for the locations in this proposal?  
Pay In Full:

You are Paying Monthly.

Payment Method ⓘ

ACH Credit Card

Continue >

**Interview Pages**  
Agent Information  
Account Information  
Account Contact Information  
Location Information  
Location Information - Additional Questions  
Check Application for Issues  
Payment Options  
Confirmation Page

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Click *Submit Proposal* to proceed.

### Confirmation Page (Page 8 of 8)

Please review the details below for a summary of your application.

- Insured Name: Agent1, Test
- Created By: TestJeromey Bell
- Date Created: 1/29/2026
- Effective Date: 1/29/2026
- Agency: \*Test REIP Branded Agency
- Agent: Jeromey Bell
- Commission: 15.00%

Please Submit Proposal

Submit Proposal

26

Once you're on the proposal page, click *UW Exception Management* first. This will identify any items that must be sent to Underwriting for review or approval.

The screenshot shows a web interface for a proposal. At the top, there is a navigation bar with buttons: 'Edit Location Schedule', '...', 'Send DocuSign', 'View Proposal Doc', 'UW Exception Management' (highlighted with a red box), 'Reject Proposal', and 'More'. Below the navigation bar, the proposal title is '058 - Agent1, Test'. There are two red warning banners: 'This Agency is not valid. Please review the information and try again or contact your administrator.' and 'Payment Required: To proceed with binding this proposal, please make an initial payment. You can do so by clicking the link provided in the Online Payment Information section.' Below the warnings, there is a green box with the text 'e Successful.' The main content area is divided into two columns. The left column is titled 'Detail' and contains a table with the following data:

Unit:	Agent1, Test
Address:	8418 Summit St: 26-27
Unit Type:	REInsurePro
Policy Number:	P000117058
Effective Date:	01/29/2026
Expiration Date:	01/29/2027
Status:	Submitted
Application Type:	Application
Imports?	No

The right column is titled 'Agency and Agent Information' and contains a table with the following data:

Agency:	*Test REIP Branded Agency
Agent:	Bell, Jeromey
Regional Agency Manager (RAM):	Nick Brown
Commission Profile:	15% New / 15% Renewal
Commission Percentage:	15.00
AMP Fee Rate:	0.00
Referral Percentage:	0.00

Below the 'Agency and Agent Information' table, there is a 'Rating Totals' section with a table:

+ Annual Premium:	3,618.56
+ Account Setup Fee:	50.00
Location Fees:	60.00

At the bottom left of the 'Detail' column, there are two buttons: 'Pay Online' and 'Send Payment Link'.

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Click the *Send DocuSign* button to send the documents to the client for review and signature.

The screenshot shows a web interface for a proposal. At the top, there is a navigation bar with dropdown menus: 'Policy Admin', 'Proposals', and 'Agency Admin'. Below the navigation bar, there are buttons: 'Edit Location Schedule', '...', 'Send DocuSign' (highlighted with a red box), 'View Proposal Doc', 'UW Exception Management', 'Reject Proposal', and 'More'. Below the navigation bar, the proposal title is 'Agent1, Test'. There are two red warning banners: 'This Agency is not valid. Please review the information and try again or contact your administrator.' and 'Required: To proceed with binding this proposal, please make an initial payment. You can do so by clicking the link provided in the Online Payment Information section.' Below the warnings, there is a yellow banner with the text 'Bind cannot occur while Pending Subjectivities exist.' Below the banners, there is a green box with the text 'rule(s) to bypass.' The main content area is divided into two columns. The left column is titled 'Detail' and contains a table with the following data:

Unit:	Agent1, Test
Address:	8418 Summit St: 26-27
Unit Type:	REInsurePro
Policy Number:	P000117058
Effective Date:	01/29/2026
Expiration Date:	01/29/2027
Status:	Submitted
Application Type:	Application

The right column is titled 'Agency and Agent Information' and contains a table with the following data:

Agency:	*Test REIP Branded Agency
Agent:	Bell, Jeromey
Regional Agency Manager (RAM):	Nick Brown
Commission Profile:	15% New / 15% Renewal
Commission Percentage:	15.00
AMP Fee Rate:	0.00
Referral Percentage:	0.00

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In the Pay Online section of the proposal, click *Send Payment Link*. The client must submit their initial payment along with the DocuSign to bind the proposal.

Status:	Submitted	AMP Fee Rate:	0.00
Type:	Application	Referral Percentage:	0.00
SOV Imports?	No		

**Pay Online**

Pay Online      **Send Payment Link**

**Billing Information**

Pay In Full:	No
Payment Method ⓘ	Credit Card
Billing Level:	Account Bill
Billing Account:	(Unknown)
Billing Frequency:	Monthly

**Cost Details**

Annual:	4,456.47
Monthly ⓘ	379.73

**Rating Totals**

+ Annual Premium:	3,618.56
+ Account Setup Fee:	50.00
Location Fees:	60.00
Technology Fees:	0.00
Additional Fees:	144.74
Reporting Fees:	0.00
AMP Fees:	0.00
Referral Fees:	0.00
Agent Commissions:	542.78
+ Total Fees:	747.53
+ Surplus Lines Tax:	40.38
+ Total State Fees ⓘ	0.00
+ Transaction/CC Fees:	12.52
= Total Cost:	4,456.47

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Once the client completes the DocuSign and makes their payment, the *Bind Proposal* button will appear in the top-right corner. Click it to proceed.

Agency Admin ▾

View Proposal Doc    UW Exception Management    Reject Proposal    **Bind Proposal**    More ▾

**valid. Please review the information and try again or contact your administrator.**

**Agency and Agent Information**

Agency:	<b>*Test REIP Branded Agency</b>
Agent:	<b>Bell, Jeromey</b>
Regional Agency Manager (RAM)	Nick Brown
Commission Profile:	15% New / 15% Renewal
Commission Percentage:	15.00
AMP Fee Rate:	0.00

30

When the next screen appears, select *Done* to start the binding process.

**Bind Proposal**

Done Cancel

**Location Schedules**

PolicyNumber	BillingFrequency	Total Premium	Total Cost
26-1121521	Monthly	0.00	51.50
26-1121521-0001	Monthly	3,618.56	4,417.49

Done Cancel

**Premium Rating Policy Totals**

Premium	3,618.56
Fees	747.52
Surplus Lines Tax	40.39
Account Setup Fee	50.00
Installation Fees	12.52
Total Cost	4,468.99

**Premium Rating Location Schedule**

Account Setup Fee	50.00
Installation Fees	1.50
Total Cost	51.50

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When the binding process completes, the screen will show the new account number and provide links to the policy, effective date, description, and cost details.

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Policies > 26-1121521 - Agent1, Test ☆ Do Not Renew

Quote Proposal has been bound.

**Account Information**

Account: [Agent1, Test](#)  
Account Number: REIP1121521

**Policies**

Policy Number	Effective Date	Account Policy	Description	Billing Account	Monthly Cost	Annual Total Cost
26-1121521	01/29/2026	Yes	8418 Summit St: 26-27	(Unknown)	379.73	4,456.47
1 RECORDS					379.73	4,456.47

Oper: No open  
All N: No note:  
Rece: No email  
Contact: No cont.  
Files: You sent you sign.