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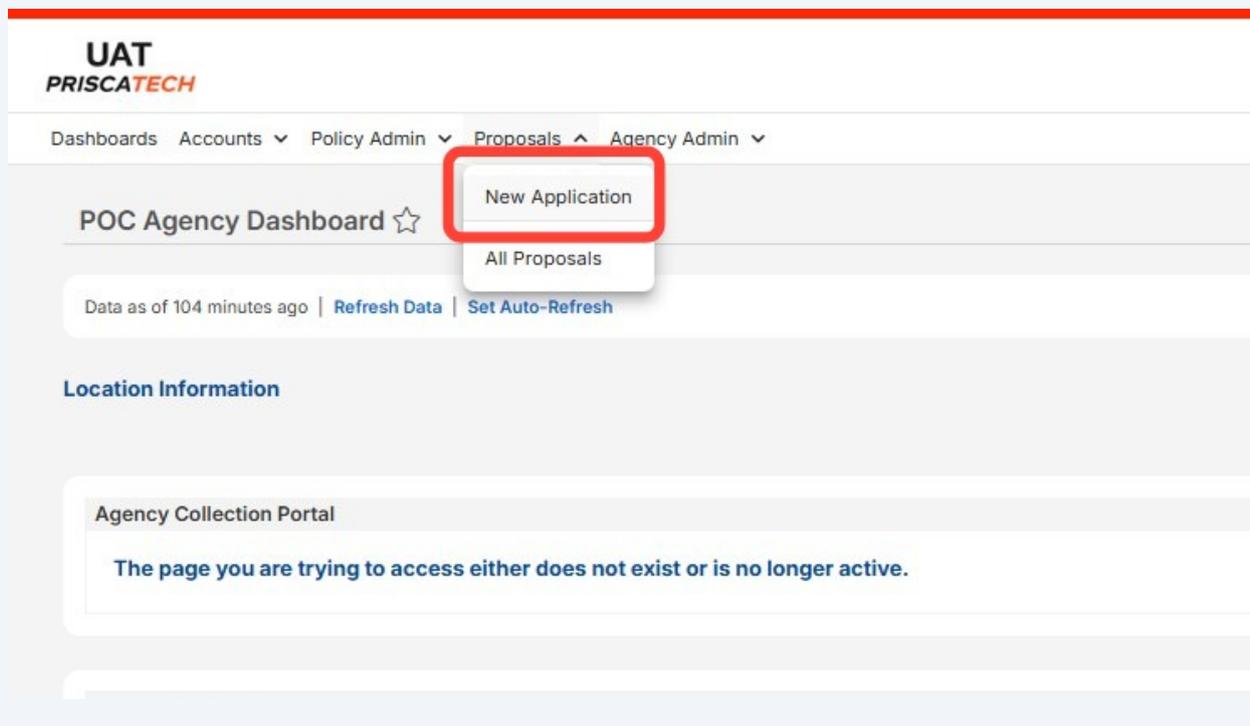
2 Use the calendar icon to choose the Effective Date. The system will automatically populate the Expiration Date, along with your Agency and Agent information.

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

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

ℹ **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 ℹ *	REInsurePro
Entity Type: *	Individual
Override Address:	☐
Street1: *	Begin typing address to pull up lookup
City: *	
State: *	- None Selected -
Postal: *	

Primary Contact Information

First Name: *	
Last Name: *	
Email: *	ex. jsmith@municipality.com
Phone: *	ext

Primary Contact Roles:

Primary Contact:	☐
Admin:	☐
Billing Contact:	☐
Partner:	☐

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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

ℹ **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 ℹ *	REInsurePro
Entity Type: *	Individual
First Name: *	Test
Last Name: *	Agent1
Override Address:	☐
Street1: *	11443 oak street
	11443 Oak St Apt Kansas City, MO 64114
	11443 Oak St Kansas City, MO 64114
City: *	
State: *	- None Selected -
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: * `11443 Oak St`

City: * `Kansas City`

State: * `Missouri`

Postal: * `64114`

Primary Contact Information

First Name: *

Last Name: *

Email: * `ex. jsmith@municipality.com`

Phone: * ext

Preferred Contact Method: * `- None Selected -`

Primary Contact Roles:

Primary Contact:

Admin: ☐

Billing Contact: ☐

Partner: ☐

Property Manager: ☐

Secondary Contact Information

Do you wish to add a secondary contact? ☐

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

Primary Contact Information

First Name: * `Test`

Last Name: *

Email: * `ex. jsmith@municipality.com`

Phone: * ext

Preferred Contact Method: * `- None Selected -`

Primary Contact Roles:

Primary Contact:

Admin: ☐

Billing Contact: ☐

Partner: ☐

Property Manager: ☐

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   ⊕ New Account Contact Show All

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

Continue >

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

UAT
PRISCATECH

Dashboards   Accounts ⌄   Policy Admin ⌄   Proposals ⌄   Agency Admin ⌄

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

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

Location Records   ⊕ New Location Show All

Location Number	Name	Street1	City	State	Postal Code

Upload Locations via   ☐
Spreadsheet? ⓘ

Continue >

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

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

12 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.

Location Information – Additional Questions (Page 5 of 8)

| < Go Back | Reject Proposal | Continue > |

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 >

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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 ^		Year Built: *	1945 ˅
Square Feet ⓘ	759			
Override Square Feet?	- None Selected - ˅			
Construction Type:	- None Selected - ˅		Year Roof:	- None Selected - ˅
Status: *	- None Selected - ˅		Year Electric:	- None Selected - ˅
Number of Stories: *			Year Plumbing:	- None Selected - ˅
			Year HVAC:	- None Selected - ˅

Property Coverage

14 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.

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.

16 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 Coverage? *   ○ 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

17 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

18 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   ⊕ New Location Schedule Contact

Name	Contact Type	Title	Email	Work Phone	Role

Lender Paid: * | No   ^ |

Location Eligibility Questions

Subject To: *
○ Yes
○ No

Tenants Subsidized % *
- None Selected -   ˅

Is this lender placed coverage or a non performing note? *
○ Yes
○ No

19 Fill out the required Location Eligibility Questions.

Location Eligibility Questions

Subject To: *
○ Yes
○ No

Tenants Subsidized % *
- None Selected -   ˅

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? *
- None Selected -   ˅

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

22 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.

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

24 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.

25 Click *Submit Proposal* to proceed.

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.

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

28 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.

29 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.

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

31 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.