



Utica First
Agency Link
Quick Tips

Initial Login

The Agency Link Login Screen accepts the entry of your User ID (for example, UISAgent) followed by your password (remember your password is case sensitive). You no longer need to enter the **Ufirst** prefix on the User Id like you did for iSolutions.

Note also you EITHER mouse-click on the **Login** button or hit <Enter> to successfully log-in.



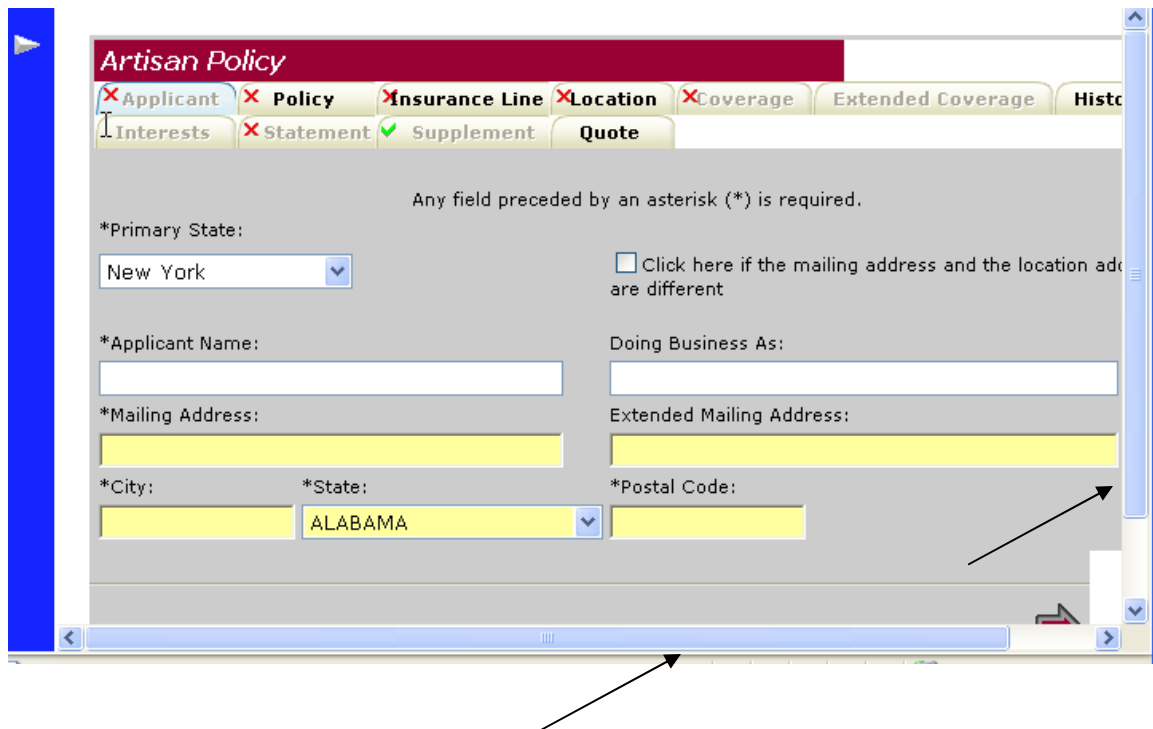
Enter your login credentials below to gain access to the system.

User ID (for example, UISAgent) followed by your (case sensitive) password. The "ufirst" prefix is no longer needed.

User ID:	<input type="text"/>
Password:	<input type="password"/>
	<input type="button" value="Login"/> <input type="button" value="Change Password"/>

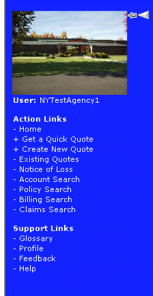

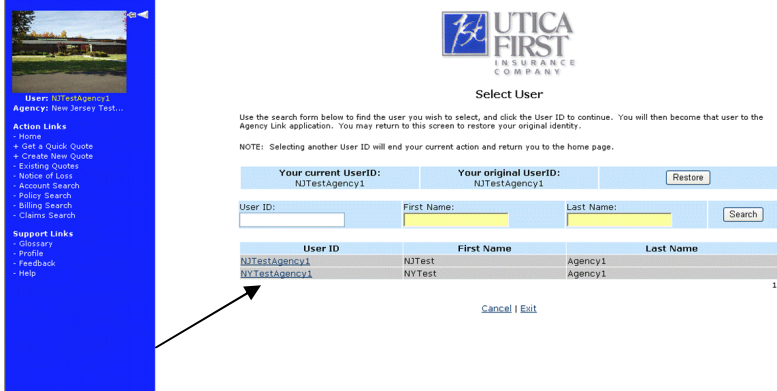


Using Scroll Bars to See Entire Screen

If you are viewing any Agency Link screen on a smaller monitor (for example, a laptop) or you are using Agency Link in minimized form (not under the full screen), scroll bars will appear on the right or bottom. This will allow you to scroll to view all the information on the screen. In other words, if you see scroll bars on the right or bottom, there is information on the screen not currently in your view. This becomes critical when there are required fields out of your view that need entry in order for you to have no errors. If you get an error window and you can not see the field mentioned in the error, use the scroll bars to get to that field.



Doing Work as Another Agent

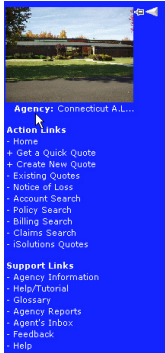
Mimicking
(viewing
another agent's
quotes or
inquiring on
his policies)

<p>1.</p>	<p>If you have the authority to do work as another agent (for example, a New York agent reviewing his Pennsylvania subcode or an agent with 6 sub-coded offices reviewing one of the other offices besides his own), and need to do so, click on User in the left frame.</p>   <p>Result: The Select User screen will display.</p>
<p>2.</p>	<p>Click on the user id (agent) you want to do work as.</p>  <p>Result: The home page will be displayed, this time showing the new agent as a “mimick”.</p>
<p>3.</p>	<p>Notice the original agent is shown, but all work will now be done as the mimicked agent.</p>   <p>Result: The home page will be displayed, this time showing the new agent as a “mimick”.</p>

Doing Work as Another Agent, Continued

Quoting as a different Agent

4. If you have the authority to quote as another agent (for example, a New York agent quoting as his Pennsylvania subcode or an agent with 6 sub-coded offices quoting as one of the other offices besides his own), and need to do so, click on Agent in the left frame.



The screenshot shows the website's header with the Utica First Insurance Company logo and the text 'Agency Link / Home'. Below the logo is a welcome message: 'Welcome to the new Utica First Agency Inquiry and Rating Website!'. A navigation menu on the left is highlighted in blue, with 'Agent' selected. The menu includes 'Action Links' (Home, Get a Quick Quote, Create New Quote, Existing Quotes, Notice of Loss, Account Search, Policy Search, Billing Search, Claims Search, Solutions Quotes) and 'Support Links' (Agency Information, Help/Tutorial, Glossary, Agency Reports, Agent's Inbox, Feedback, Help). A blue horizontal line is at the bottom of the page.

Result: The Select Agency screen will display.

5. Click on the Agency ID (and state) you want to do work as.

Select Agency

Use the search form below to find the agency you wish to select, and click its link to continue.

NOTE: Selecting another Agency will end your current action and return you to the home page.

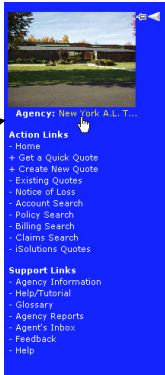
Agency ID:	Agency Name:	State:	Search
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Search"/>

Agency ID	Agency Name	State
2438000	New York A.L. Test Agency	NY
2439000	Connecticut A.L. Test Agency	CT
2440000	New Jersey A.L. Test Agency	NJ
2441000	Pennsylvania A.L. Test Agency	PA
2442000	Ohio A.L. Test Agency	OH

Cancel | Exit

Result: The home page will be displayed, this time showing the new agent selected.

6. Notice the original agent is *not* shown. Instead, the agent you switched to will be displayed.



The screenshot shows the website's header with the Utica First Insurance Company logo and the text 'Agency Link / Home'. Below the logo is a welcome message: 'Welcome to the new Utica First Agency Inquiry and Rating Website!'. A navigation menu on the left is highlighted in blue, with 'Agent' selected. The menu includes 'Action Links' (Home, Get a Quick Quote, Create New Quote, Existing Quotes, Notice of Loss, Account Search, Policy Search, Billing Search, Claims Search, Solutions Quotes) and 'Support Links' (Agency Information, Help/Tutorial, Glossary, Agency Reports, Agent's Inbox, Feedback, Help). The agency name in the header is now 'New York A.L. Test Agency'. A blue horizontal line is at the bottom of the page.

Doing Work as Another Agent, Continued

Quoting as a different Agent (continued)

5.

Notice that now when you Create a New Quote, the State Code will be the one you switched to

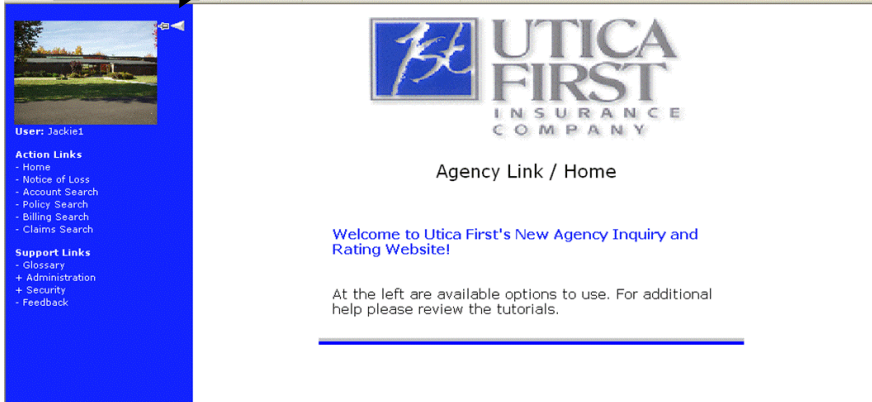
The screenshot displays the 'Business Owners Policy' form. At the top, there are several tabs: Applicant, Policy, Insurance Line, Location, Coverage, Extended Coverage, and History. Below these are sub-tabs: Interests, Statement, Quote, Supplement, Liquor, and Antiques. The 'Quote' sub-tab is currently selected. The form contains several fields with asterisks indicating they are required: '*Primary State:' (dropdown menu set to 'New York'), '*Applicant Name:', '*Mailing Address:', '*City:', and '*Postal Code:'. There is also a '*State:' dropdown menu currently set to 'ALABAMA'. A checkbox is present with the text 'Click here if the mailing address and the location address are different'. A red arrow points to the 'New York' selection in the Primary State dropdown menu.

Result: In this case, the original user was the Connecticut agent. When the New York agency was chosen, all quotes now will be for New York.

Left Frame View

Left Frame View

1. To make the Left Frame menu stay displayed, click on the Stick Pin.



User: Jackie1

Action Links

- Home
- Notice of Loss
- Account Search
- Policy Search
- Billing Search
- Claims Search

Support Links

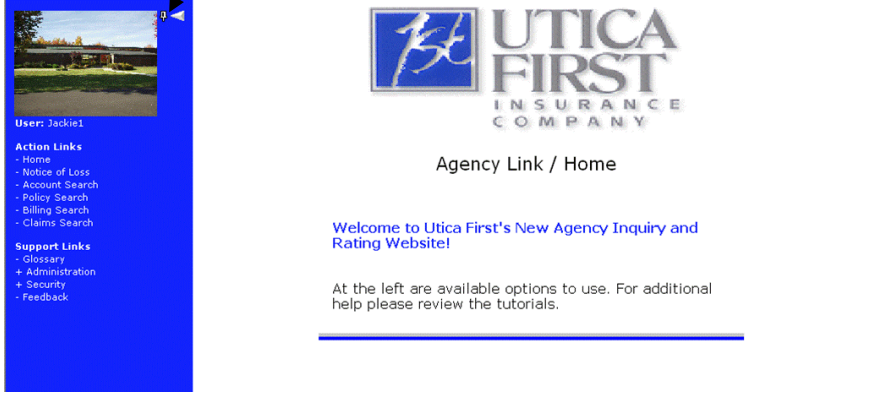
- Glossary
- + Administration
- + Security
- Feedback

Agency Link / Home

Welcome to Utica First's New Agency Inquiry and Rating Website!

At the left are available options to use. For additional help please review the tutorials.

Result: When the Stick Pin is clicked to point down, the blue Left Frame will always display no matter what screen you are on.



User: Jackie1

Action Links

- Home
- Notice of Loss
- Account Search
- Policy Search
- Billing Search
- Claims Search

Support Links

- Glossary
- + Administration
- + Security
- Feedback

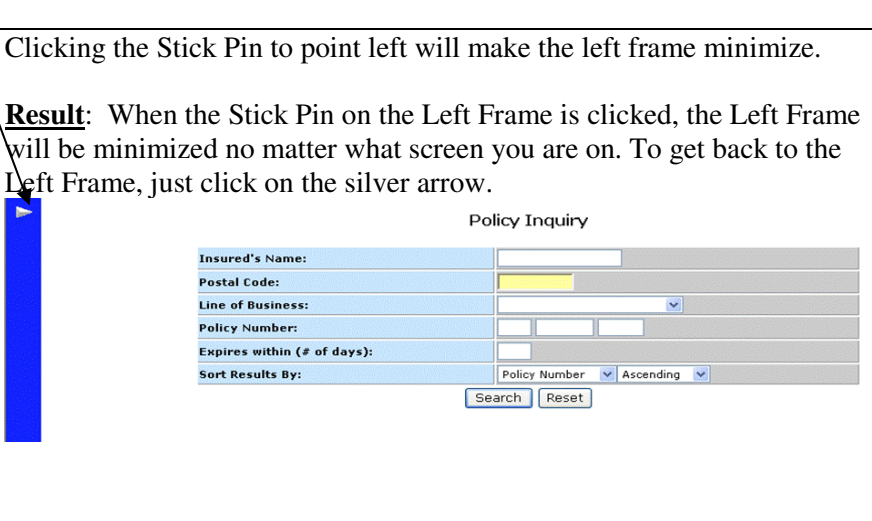
Agency Link / Home

Welcome to Utica First's New Agency Inquiry and Rating Website!

At the left are available options to use. For additional help please review the tutorials.

2. Clicking the Stick Pin to point left will make the left frame minimize.

Result: When the Stick Pin on the Left Frame is clicked, the Left Frame will be minimized no matter what screen you are on. To get back to the Left Frame, just click on the silver arrow.



Policy Inquiry

Insured's Name:	<input type="text"/>
Postal Code:	<input type="text"/>
Line of Business:	<input type="text"/>
Policy Number:	<input type="text"/>
Expires within (# of days):	<input type="text"/>
Sort Results By:	Policy Number <input type="text"/> Ascending <input type="text"/>

Extended Coverage Screen

Extended Coverage Screen

1. You can access the *Extended Coverages* screen by using the red navigation button or by clicking on the **Extended Coverage** tab in the browser window.

The screenshot shows the 'Extended Coverage' tab selected in a browser window. The interface includes a navigation bar with tabs for Applicant, Policy, Insurance Line, Location, Coverage, Extended Coverage, and History. Below the navigation bar, there is a 'Select Location' dropdown menu with '1 - ASDF' selected. A note states 'Any field preceded by an asterisk (*) is required.' The main area is divided into two columns: 'Optional Coverage' and 'Selected Coverage'. The 'Optional Coverage' column lists various coverages such as 'Accounts Receivable', 'Additional Insured - Blanket Coverage', 'Contractors Equipment', and 'Fire Legal Liability'. The 'Selected Coverage' column is currently empty. There are 'Add>>' and '<<Remove' buttons between the columns, and a 'Click to Continue' button at the bottom. A red double-headed arrow is visible in the bottom right corner.

Result: A list of available Extended Coverages is displayed for this Location/Building.

Note: You can select multiple coverages by clicking on the coverage while holding down the <Ctrl> key.

2. Add the *Extended Coverage(s)* by clicking the **Add** button.

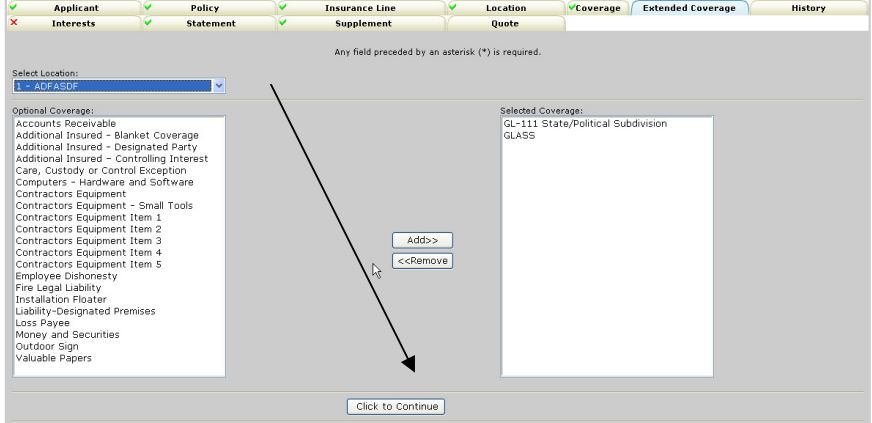
This screenshot is similar to the previous one, but with an arrow pointing to the 'Add>>' button. The 'Selected Coverage' column now contains two items: 'GL-111 State/Political Subdivision' and 'GLASS'. The 'Optional Coverage' list is the same as in the previous screenshot.

Result: The coverage name(s) appear(s) to the Left of the window.

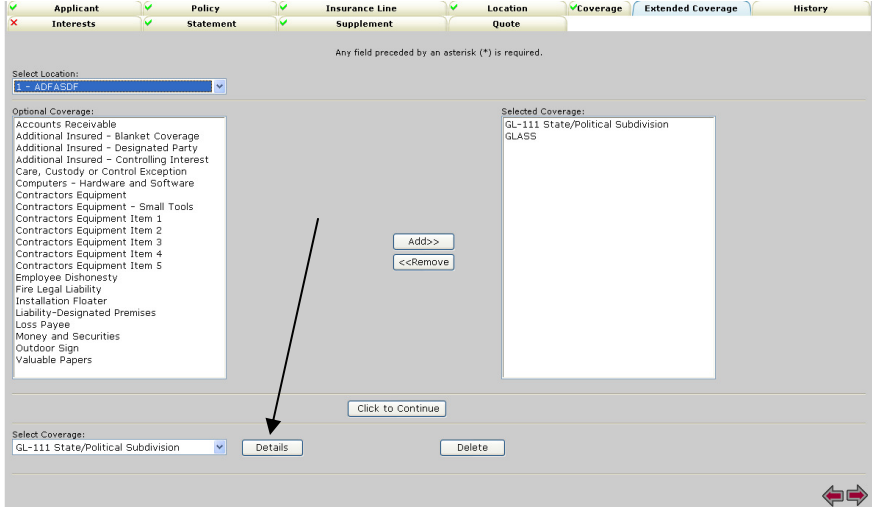
Extended Coverage Information, Continued

Extended Coverage Information (Continued)

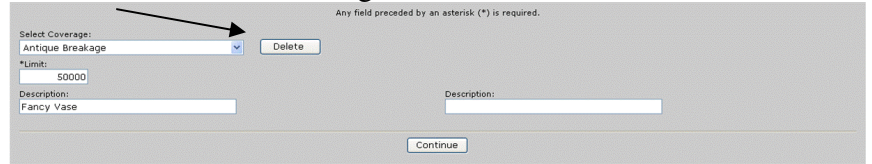
3. Use your mouse to click on the **Click to Continue** button for entry of coverage details.



4. Click on the **Details** button to enter coverage details.



5. Enter details for this coverage.



Note: You can use the dropdown to move to the next coverage. To save Information click one of the tabs to navigate to a new page.