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**Member Newsletter**

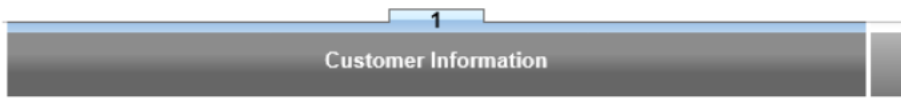
**Volume 41**

**July 2016**

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**IMPORTANT:** PLEASE PROVIDE INSURED E-MAIL

Within the "Contact Information" section of the first page of the submission process (image below), please remember to enter your INSURED'S E-MAIL ADDRESS in the necessary box (not the e-mail address of the CAP Member agent completing the submission):



**Applicant Information**

Applicant Name:	<input type="text" value="Light Metals Group"/>		
Physical Address:	<input type="text" value="210 W 12th"/>		
City:	<input type="text" value="Reno"/>	State / Province:	<input type="text" value="Nevada"/>
Postal Code:	<input type="text" value="89509"/>	Country:	<input type="text" value="USA"/>
Phone:	<input type="text" value="7758889000"/>	Fax:	<input type="text" value="7758889001"/>
Web Address:	<input type="text" value="www.lightmetalsgrp.com"/>		

[Does mailing address differ from physical address?](#) (click to display)

**Contact Information:**

First Name:	<input type="text" value="Stanley"/>
Last Name:	<input type="text" value="Duke"/>
Phone:	<input type="text" value="7758009000"/>
Email:	<input type="text" value="stanley@lightmetalsgrp.com"/>



## COMMERCIAL LINES SUBMISSIONS

For commercial lines risks, before starting a submission within the **CAPNet Connect Portal**, you will need to have:

- Complete and accurate ownership information
  - Correct FEIN (Tax ID)
  - Annual Sales
  - Number of Employees (Work Comp)
  - Annual Payroll
  - Prior carrier information with effective dates (if the client had prior coverage)
  - Current and accurate Loss information (with currently valued loss runs provided prior to bind)
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## AGENCY E&O COVERAGE

If your agency's E&O policy has recently been renewed, please remember to provide us with current proof of insurance to keep your records up-to-date. Login credentials to the **CAPNet Connect Online Portal** may be disabled if we do not have current E&O information on file.

If your policy is coming up for renewal soon, Consolidated Agency Partners is pleased to offer a unique Agents Errors & Omissions Insurance program with a variety of customizable coverage options to help you minimize risk and reduce out-of-pocket expenses. **Don't wait until the last minute, take advantage of your CAP Membership benefits and let CAP provide you with a competitive quote for your agency!**

[\*\*CLICK HERE FOR AGENTS E&O APPLICATION\*\*](#)

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## LOCATING QUOTES

With the recent updates to the **CAPNet Connect Online Portal**, some Members are having difficulty locating their outstanding quotes. When clicking on the "Quotes" tab underneath "My Agency" on the left hand side of your screen, all unfinished/saved submissions are located in

the "Incomplete Quotes" tab, and any outstanding quotes can be found within the "Pending Quotes" tab. To review the actual quote documents, select the "Details" icon next to the client name to get into the Client File.

## SERVICE REQUESTS

All policy changes (personal and commercial), certificate requests, and other service requests must be submitted through the new "Policy Services" links, which are found within the Policy Summary section of your Client File.

To submit a service request, select and complete the proper form and it will be delivered to your assigned CAP Team Member.

\* Please note, the service request forms that are available are either line of business specific or apply to all lines of business.

**Consolidated Agency Partners**  
Membership Services

Currently Logged In:  
**Chris Borchert**  
April 16, 2016

**My Agency Today**  
Retail Agent Name: CAP Insurance Agency

Client Name: **National Junior Basketball - Yorba Linda Chapter** Client Type: **Commercial**

**Policy Information for National Junior Basketball - Yorba Linda Chapter**

Details	Assignment	Policy Number	Policy Term	Line of Business	Issuing Carrier
		3602MS429036-0	06/03/2015 06/03/2016	General Liability - Commercial	Markel Insurance Company-38970
Policy Services - <a href="#">Change Mailing Address</a> - <a href="#">Dec Page Request</a> - <a href="#">Verification Setup Request</a>					
		412MS429037-0	06/03/2015 06/03/2016	General Liability - Commercial, Property - Commercial	Markel Insurance Company-38970
Policy Services - <a href="#">Change Mailing Address</a> - <a href="#">Dec Page Request</a> - <a href="#">Verification Setup Request</a> - <a href="#">Add Location</a> - <a href="#">Add Mortgage/Loss Payee</a>					
		OF-4025599322	08/16/2014 08/16/2016	Directors and Officers	Continental Casualty Company
Carrier Service Center - Claims: <a href="#">(877) 262-2727 Report a Claim</a>					
Policy Services - <a href="#">Change Mailing Address</a> - <a href="#">Dec Page Request</a> - <a href="#">Verification Setup Request</a>					

Search Filters: [\[Show\]](#)

**NOW** you can request Policy Service right from the Client Policy Summary screen in the CAPNet Connect Portal. Some Service Items are Line of Business specific and some are available on all lines.

**NO MORE EMAIL**

## NEW BUSINESS SUBMISSION PROCESS

When you log in to the CAPNet Connect Online Portal, you will notice that the new home screen includes submission links icons by line of business (below):

The screenshot displays the CAPNet Connect Online Portal home screen. At the top left is the logo for Consolidated Agency Partners Membership Services. Below the logo, it indicates the user is currently logged in and shows the date as April 16, 2016. The main heading is "My Agency Today". On the left side, there are several navigation menus: "Search", "My Agency", "User Profile" (with an "Update Password" link), "Announcements" (with links for "2016 Holiday Schedule", "Member Newsletters", "Submission Info", and "Underwriting Notice"), and "Resource Center" (with links for "Binding Instructions", "CL Billing Options", "CL Schedule Forms", "Member E&O App", and "Member Support"). The central area is titled "Request A Quote:" and features eight icons representing different insurance programs: BOP With GL and Property, Workers Comp, Commercial Auto, Cyber Liability Network Liability, Personal Package, Homeowners, Personal Auto, and Personal Umbrella. A red callout box points to the icons with the text: "Now on CAPNet Connect Home screen you can quickly select the Line of Business from the appropriate ICON." At the bottom right, a red callout box points to a "view all programs" link with the text: "For a list of all CAP Programs just click on the view all programs link".

Once the "Submit" button is selected, the submission will be sent to our system and you will receive an email with a confirmation of the submission and a summary of the data input. The client file is then added to the new "Pending Quotes" tab (below):

**Request A Quote:**



BOP With  
GL and Property



Workers Comp



Commercial Auto



Cyber Liability  
Network Liability



Personal Package

1



Homeowners



Personal Auto



Personal Umbrella

Get a quick list of your "Pending Quotes" by selecting the Pending Quotes Tab.

Drill into the details by selecting the Details ICON

Quotes for CAP Insurance Agency

Details	Assignment	Client Name Policy Number	Policy Type Line of Business	Status	Updated By Updated Date	Premium	Desired Policy Term	Issuing Carrier
		Karen Krainock dba K's Mobile Music	Commercial					
		Unassigned	Monoline General Liability - Commercial	Pending		\$462.00	08/08/2014 08/08/2015	Unassigned
		Light Metals Group	Commercial					
		10883	Monoline Workers Compensation	Pending		\$0.00	04/29/2016 04/29/2017	Unassigned <a href="#">Resubmit</a>
		Lori Lemler	Personal					
		101	Monoline Auto - Personal	Quoted		\$2,084.00	03/12/2012 03/12/2013	MetLife Auto & Home
		National Junior Basketball - Yorba Linda Chapter	Commercial					
		Unassigned	Monoline General Liability - Commercial	Pending		\$750.00	06/03/2016 06/03/2017	Unassigned
		Test Submission Corp.	Commercial					
		Unassigned	Monoline General Liability - Commercial	Pending Approval		\$0.00	03/21/2012 03/21/2013	Travelers Insurance Company
		Quote #4587	Monoline General Liability - Commercial	Quoted		\$1,218.00	03/21/2012 03/21/2013	Hartford Casualty Insurance Company

**NOW**, if you didn't write the business this term, next term, you can select the "Resubmit" link and make the necessary changes from the previous submission and resubmit the risk with updated information.

**NO MORE STARTING FROM SCRATCH**

**RESOURCE CENTER**

The Resource Center in the CAPNet Connect Online Portal has been updated to provide you with quick access to submission guide, service request process, supplemental applications, tips & tricks, commercial lines schedule forms, binding procedures, and more.

**SUBMISSION GUIDE**

**SERVICE REQUEST PROCESS**

**SUPPLEMENTAL APPS**

**TIPS & TRICKS**

## SOCIAL ENGINEERING ASSESSMENT & AWARENESS TRAINING

One of the ways to help your clients mitigate their cyber risks is through iPrevision's [Social Engineering Assessment & Awareness Training](#). Without the proper training and support regarding the risks of social engineering, phishing, spear-phishing and malware attacks, it isn't a matter of if your client's system will be affected, but a matter of when.

By recommending iPrevision's new [Social Engineering Assessment & Awareness Training](#) to your commercial insurance clients, not only will you help improve the client's overall network security, but it can also open up the dialogue to selling them their Cyber Insurance.

This is a great training program for you to refer to your clients and prospects, separating yourself from the competition as a trusted advisor by assisting the client in better securing their business, reducing their risk exposures and, ultimately, helping YOU find success in placing that client's Cyber & Data Breach Liability Coverage.