SPRISKA

SPECIALTY RISK OF AMERICA

SIMPLE INSPIRE HANDBOOK FOR PRODUCERS

MAKING PAYMENTS IN SIMPLE INSPIRE, CHANGING BILLING OPTIONS, ENROLLING/DE-ENROLLING POLICIES IN ACH, PRINTING INVOICES, NOTICES AND POLICY DOCUMENTS, ENROLL ACH COMMISSION, POLICYHOLDER PORTAL

AUGUST 2022

Index Listing

Payment Related Processes

SIMPLE INSPIRE DOCUMENTS

MISCELLANEOUS SIMPLE INSPIRE UPDATES

STEPS ON HOW TO ENROLL IN ACH WEEKLY OR MONTHLY COMMISSION PAYMENTS

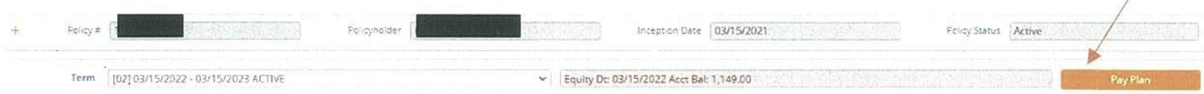
POLICYHOLDER PORTAL

PROCESS TO UPDATE PAYMENT PLAN OPTION ON POLICY

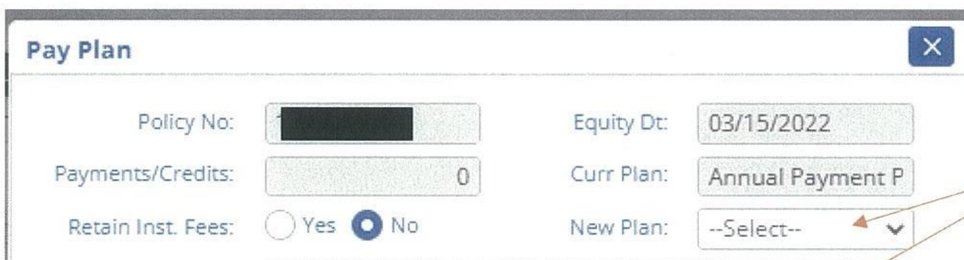
1. Sign into Simple Inspire using assigned User ID and password

2. Enter policy number in box showing Enter Value

3. Click on Pay Plan button



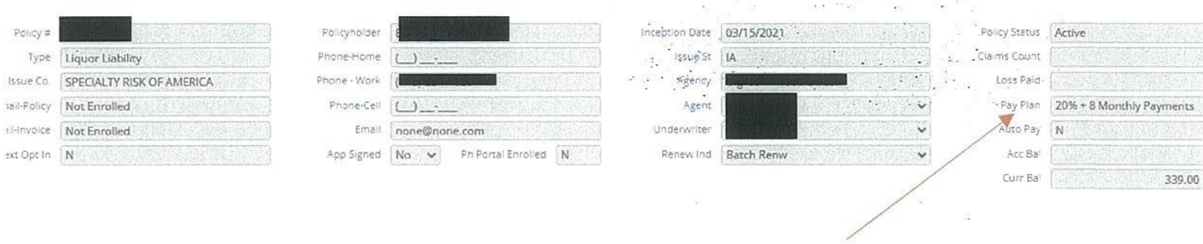
4. Select New Plan from drop down



5. Click on Proceed button once the New Plan is selected

6. Click on **+** To Confirm New Plan set up on policy

7. View Pay Plan to Confirm Correct Payment Option Selected



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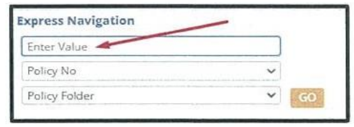
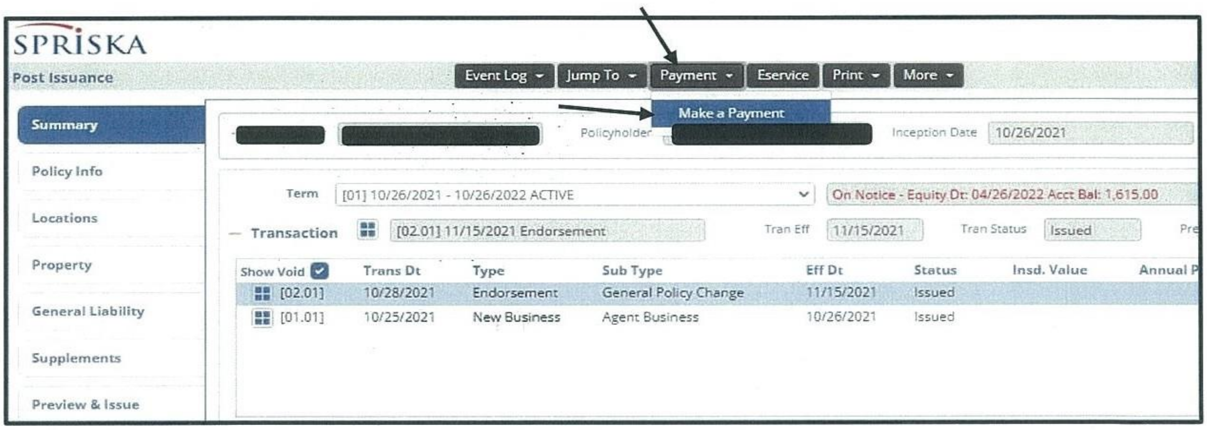
Producer Process for Making Payment in Simple Inspire

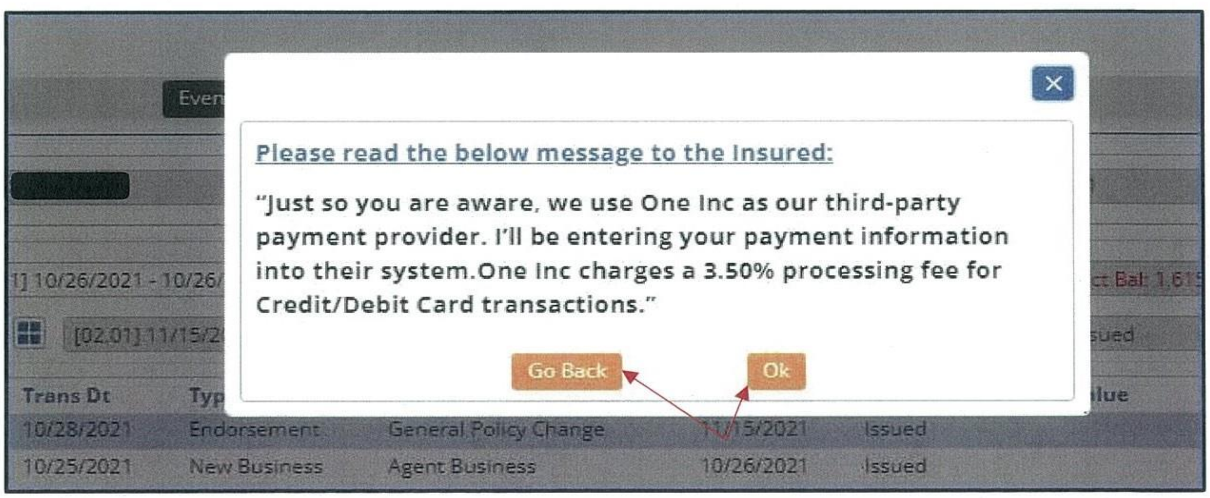
1. Open the policy in Simple Inspire – type the policy # in the **Enter Value** box in the top left corner.



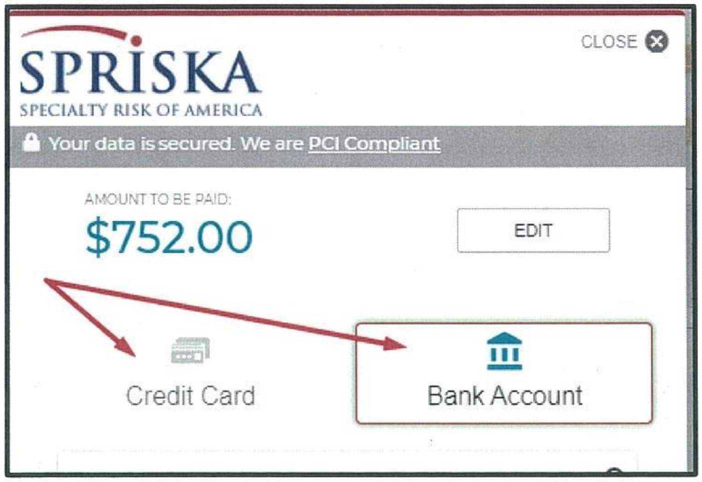
2. Click on the black **Payment Tab** in the top row, middle of the screen. Click "**Make a Payment**" option to start a payment.



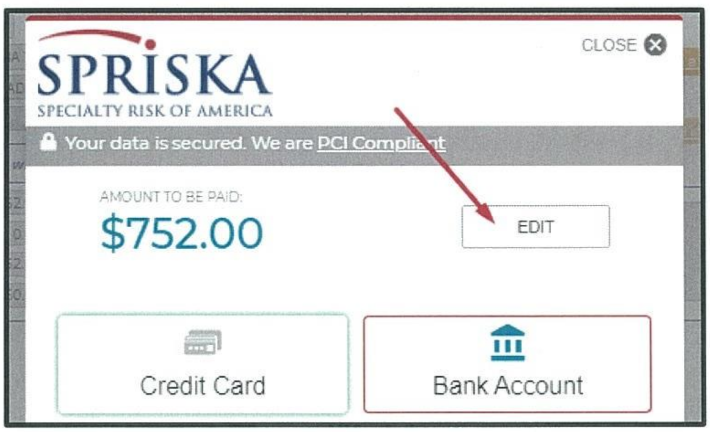
3. An information popup is displayed, please read about the processing fee for credit/debit cards. Click "OK" to continue or "Go Back" to exit.



4. Payment options - Click Credit Card or Bank Account.



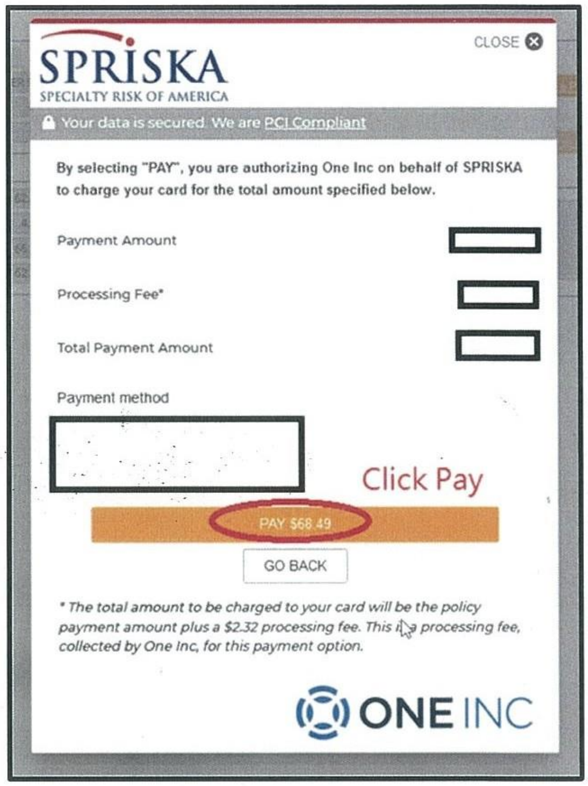
5. Click "EDIT" to change payment amount – otherwise skip to Step 7.



6. Click the Option you want to pay and Click the **orange** Edit button.

   If you choose "Other Amount" – type in the box amount to be paid.

7. Review payment information – then click "PAY $xxx.xx



8. RECEIPT - You can choose to **Email**, **Print** or **Download** the Receipt then click "Close"

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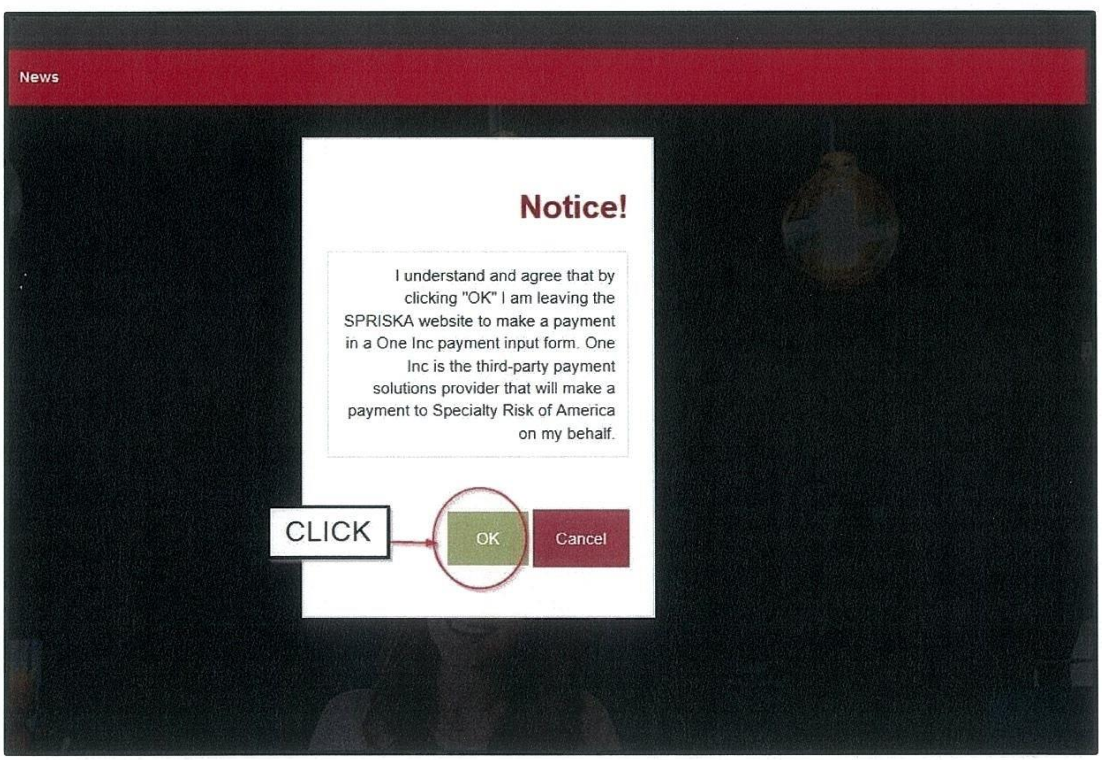
Producer Process for Making a Payment and Enrolling in AutoPay

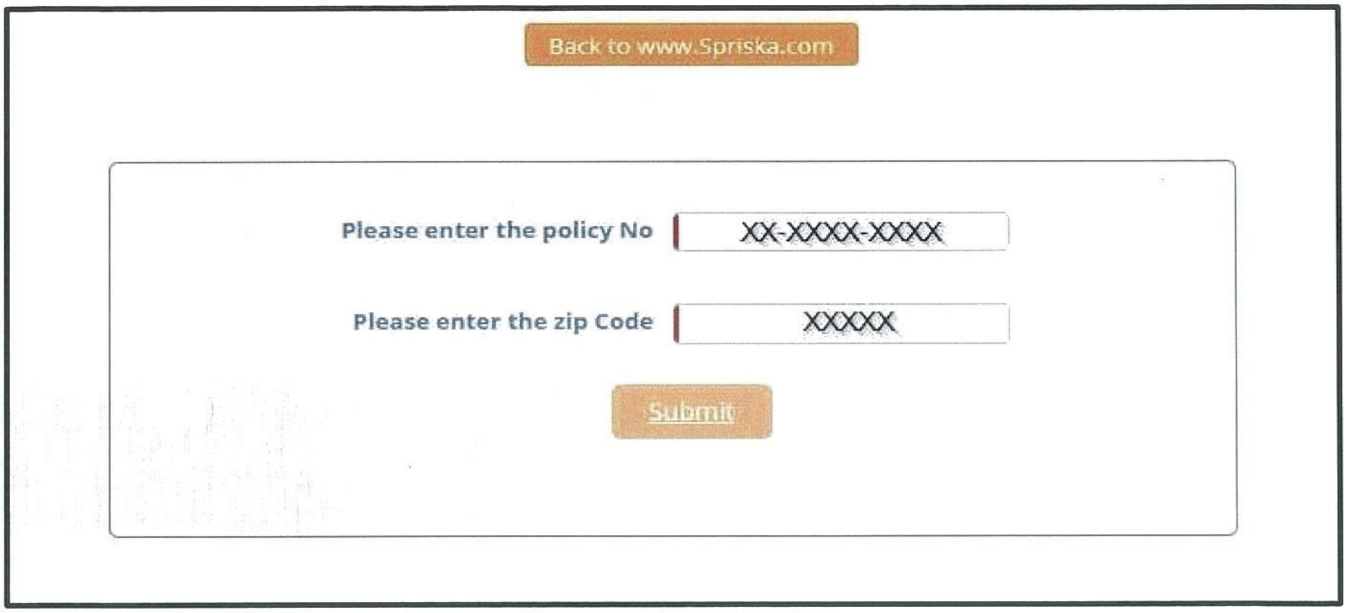
Step 1: Go to Spriska Website at www.spriska.com

Step 2: Click make a payment

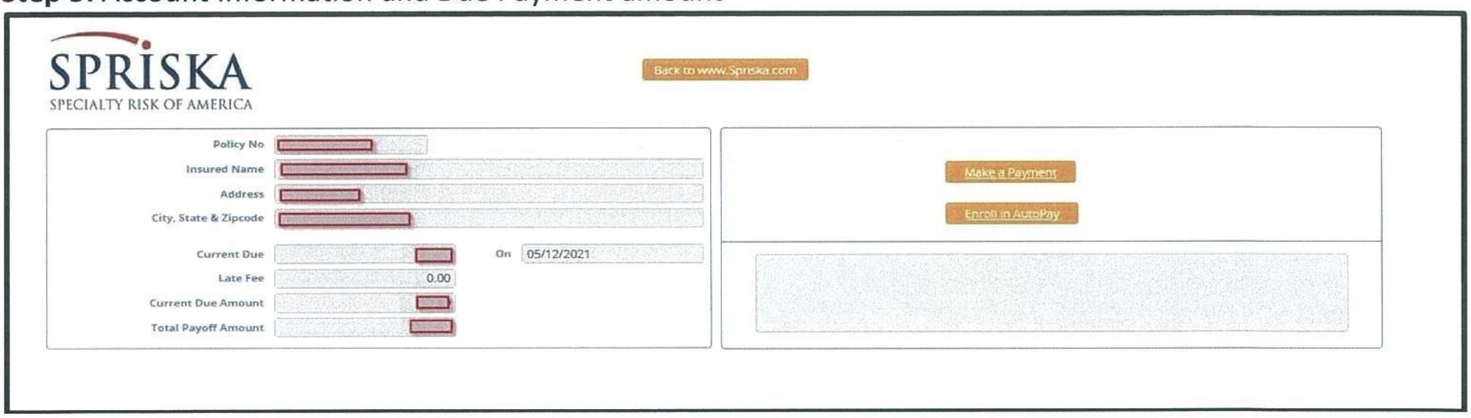
Step 3: Click "OK" to proceed



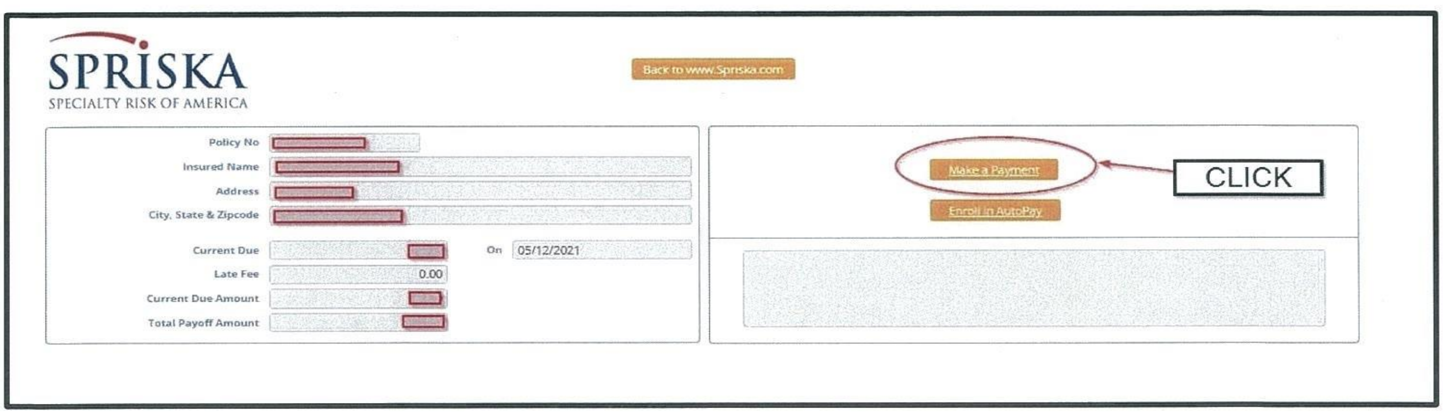
Step 4: Enter policy number (with " – " between numbers) and zip code of insured's address



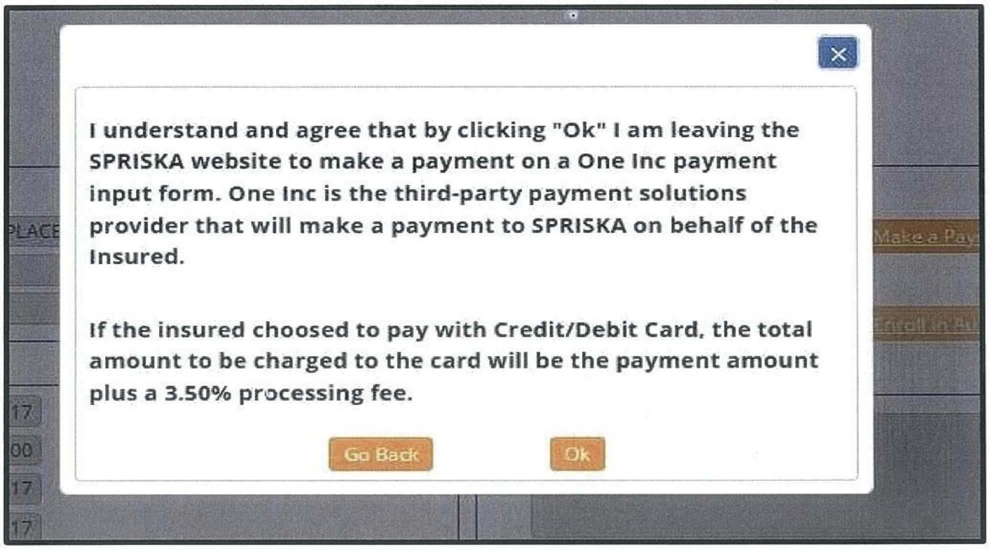
Step 5: Account Information and Due Payment amount



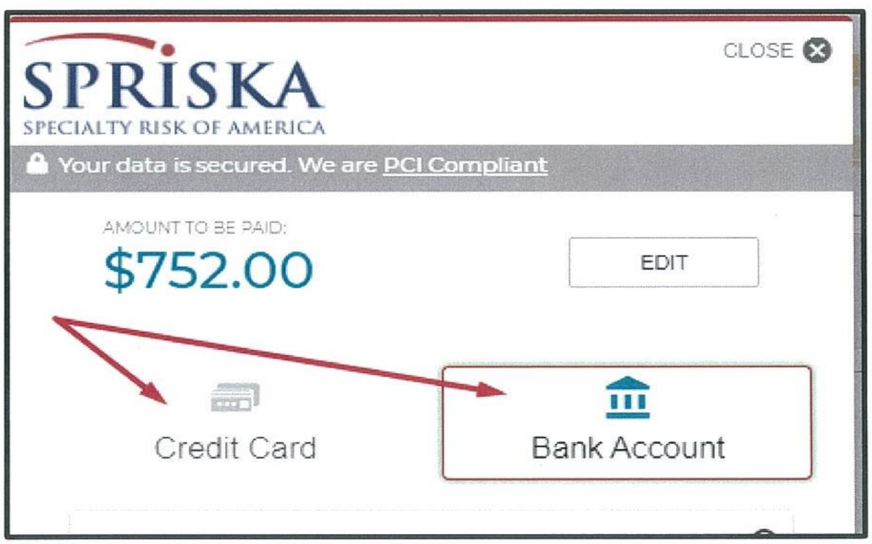
STEP 6: Click "MAKE a Payment"



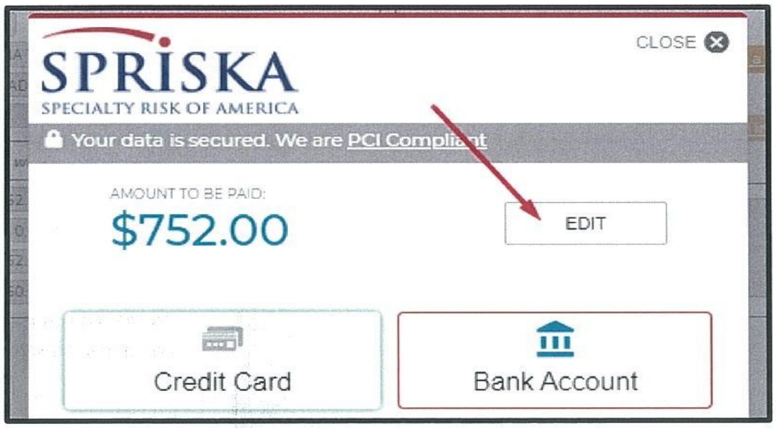
Step 7: Please Read the Message. Click "OK" to continue or "Go Back" to exit



Step 8: Payment options - Click Credit Card or Bank Account.



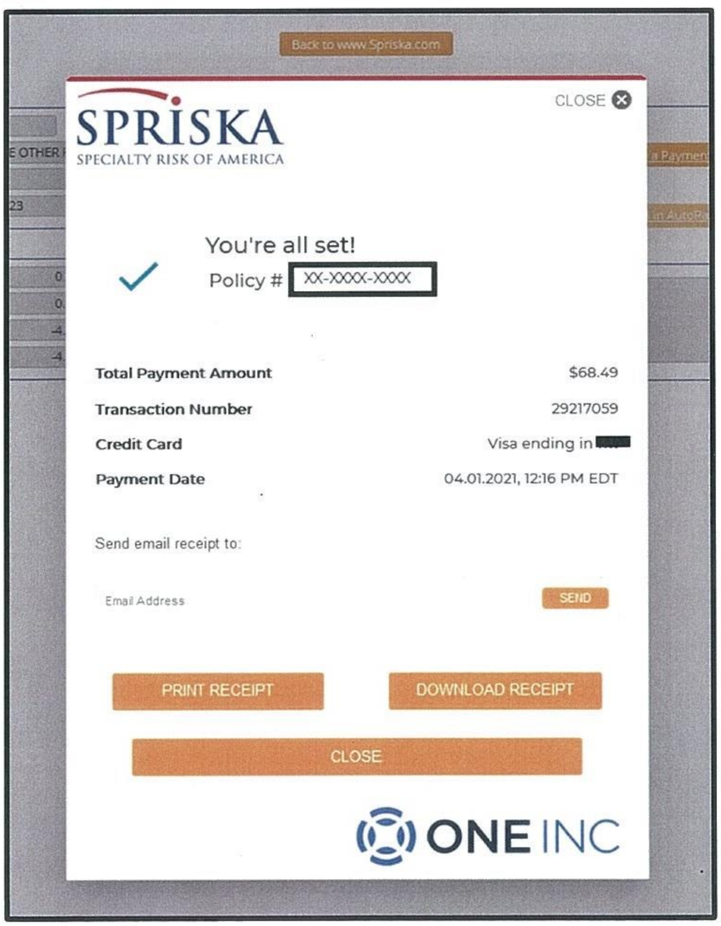
Step 9: Click "EDIT" to change payment amount – otherwise skip to Step 11



Step 10: Click the Option you want to pay and Click the orange Edit button.
If you choose "Other Amount" – type in the box amount to be paid.

Step 11: Review payment information – then click "PAY $xxx.xx

Step 12: RECEIPT - You can choose to **Email**, **Print** or **Download** the Receipt then click "Close"



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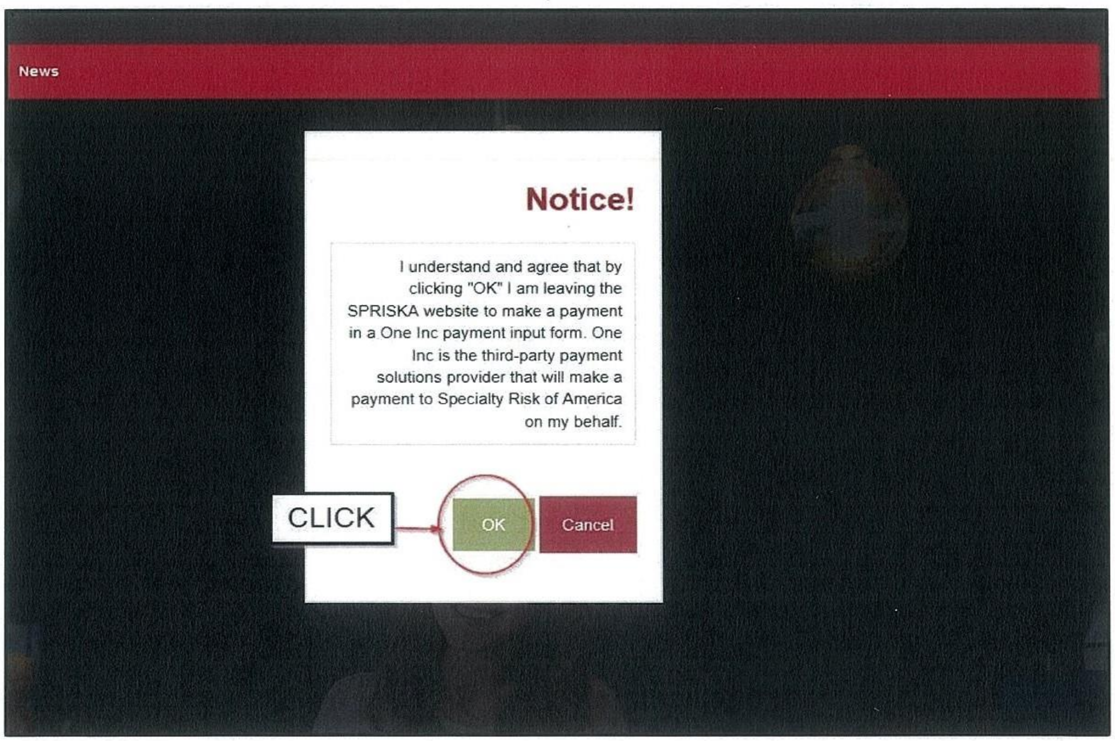
Producer Process for Enrolling into AutoPay without Making a Payment

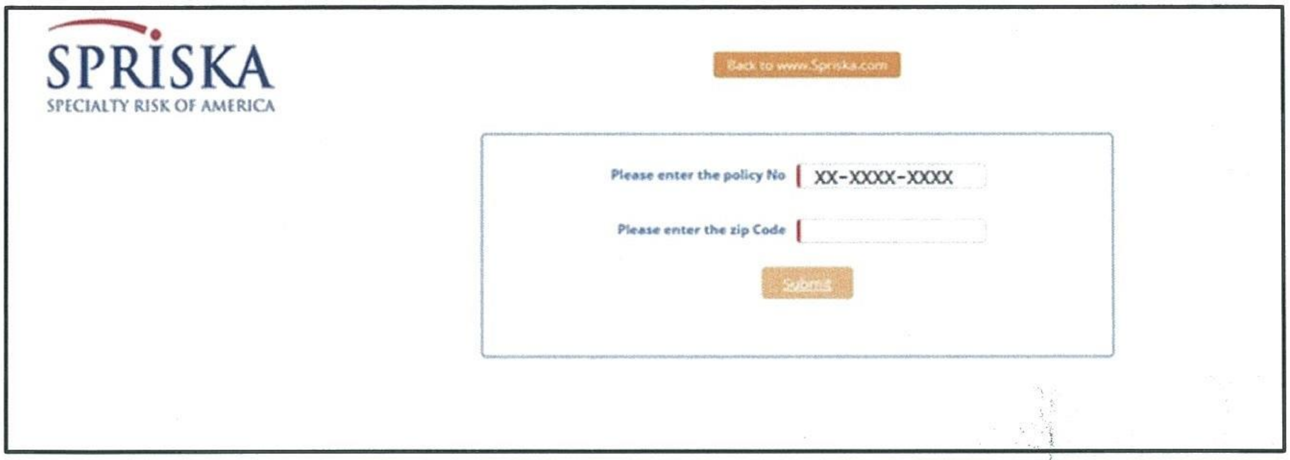
Step 1: Go to Spriska Website at www.spriska.com

Step 2: Click "MAKE A PAYMENT"

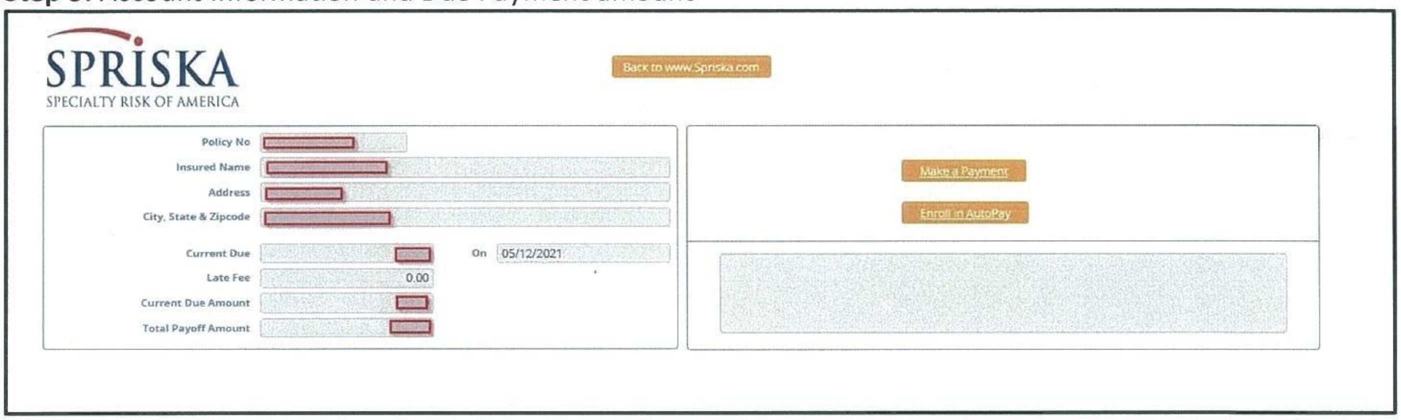
Step 3: Click "OK" to proceed



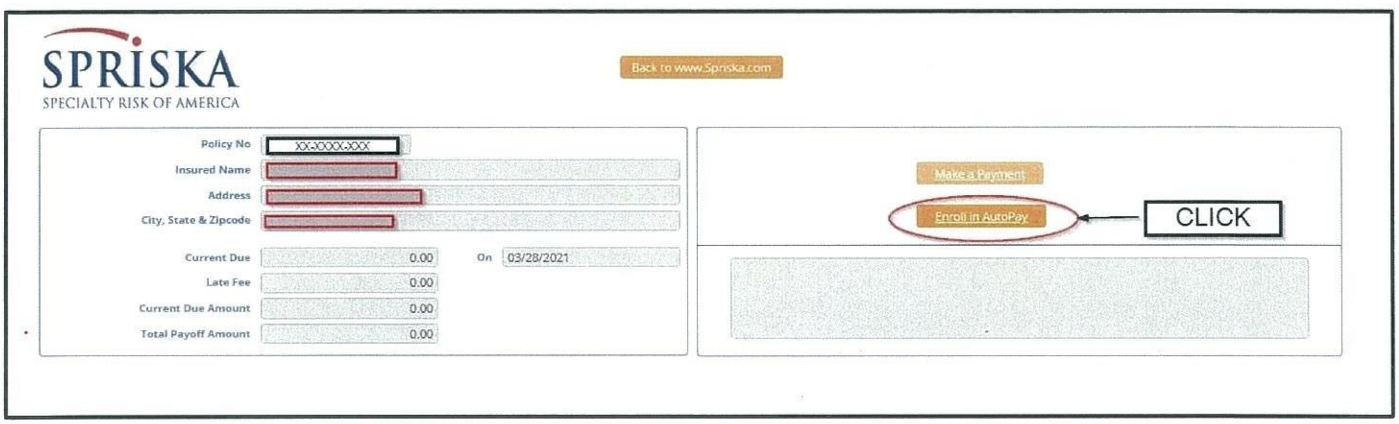
Step 4: Enter policy number (with “ – “ between numbers) and zip code of insured’s address



Step 5: Account Information and Due Payment amount



Step 6: click **“**Enroll into AutoPay”

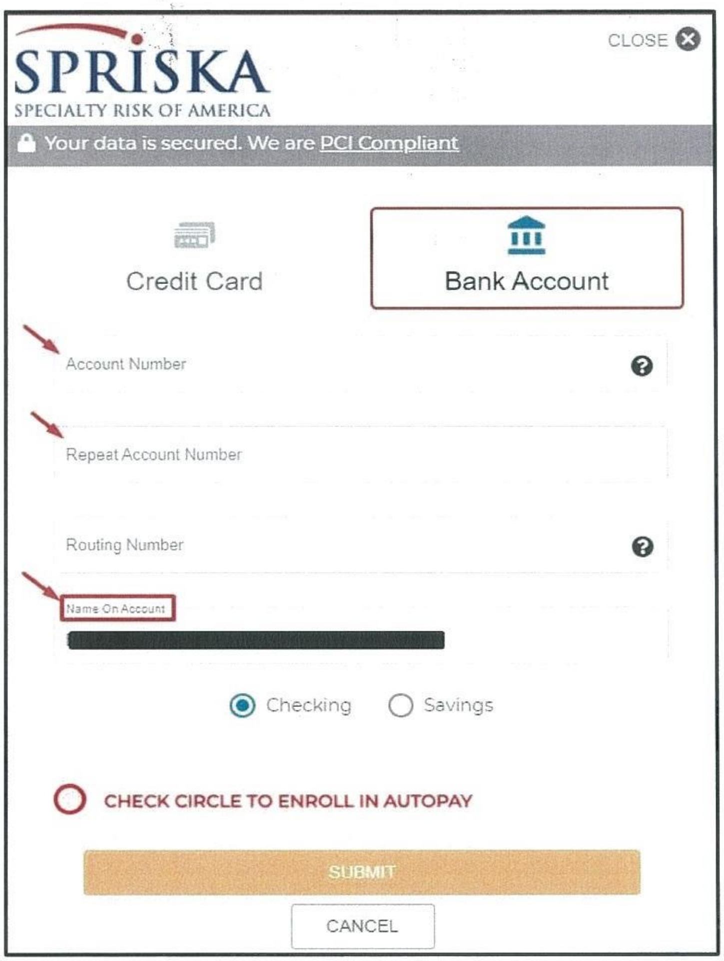


Step 7: Enter <u>Account</u> or <u>Credit</u> card information

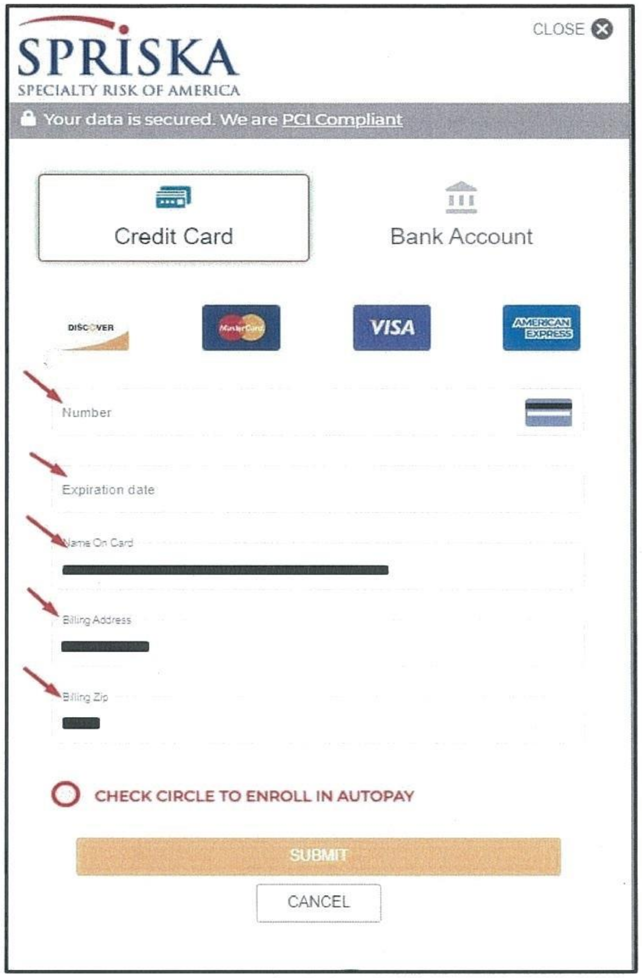
Options:

1. Bank Account (no transaction fee charge)
2. Credit card/Debit card (a 3.5% processing fee is applied to each transaction)
    - VISA
    - MASTER
    - AMERICAN EXPRESS
    - DISCOVER

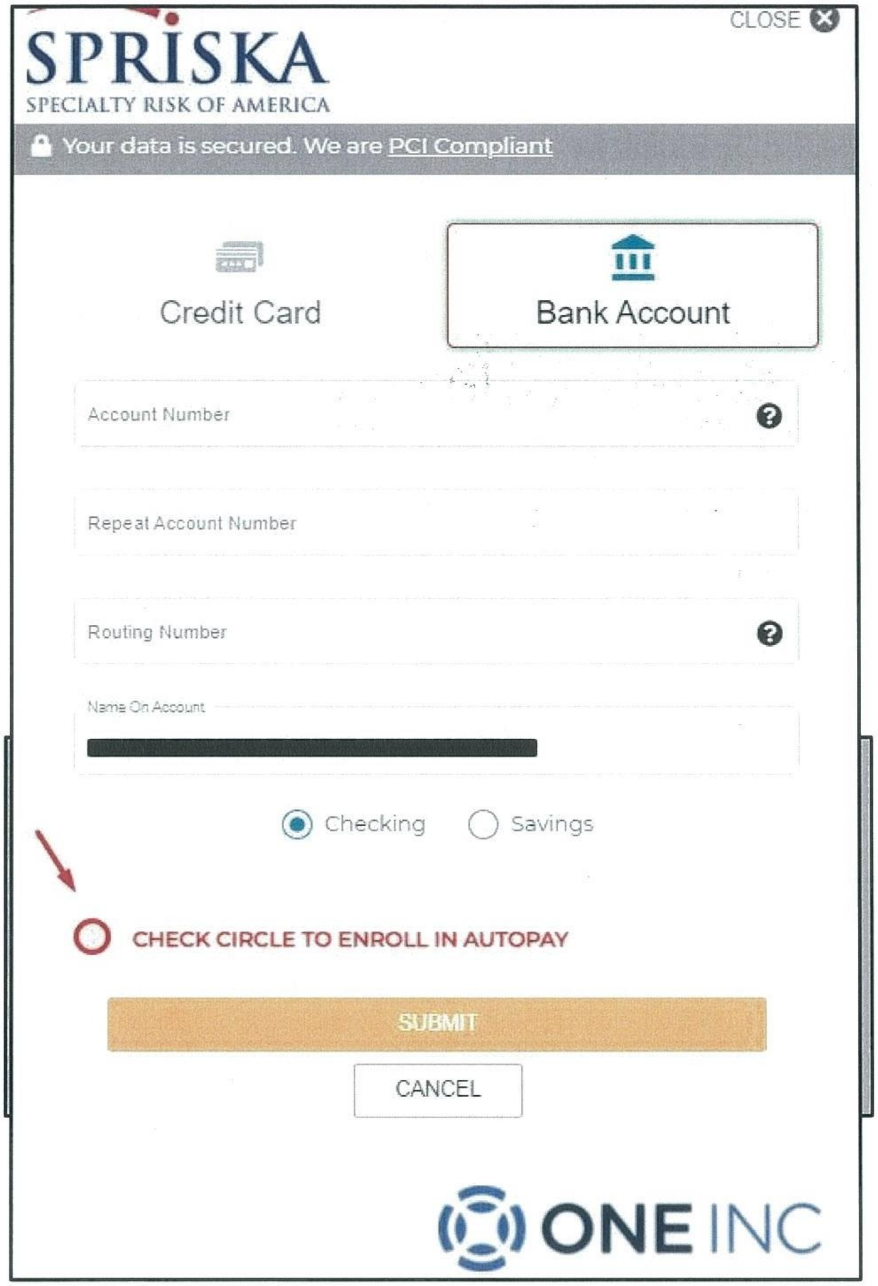
Step 7-1: Bank Account - Enter Account Number & Routing Number. Edit the name on checking account if needed



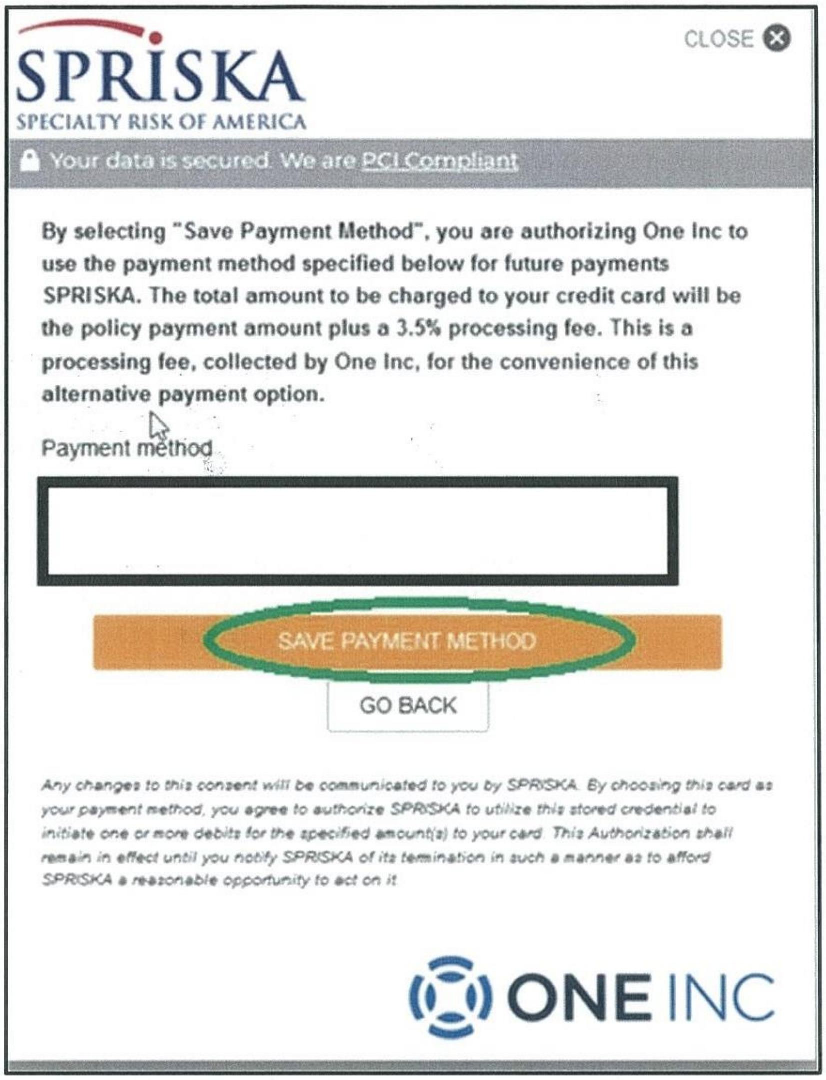
Step 7-2: Credit card - Enter card number & expiration date. Edit the name on card, billing address and zip code if needed.



Step 8: Click **"Check Circle to Enroll in AutoPay"** → click **"SUBMIT"**



Step 9: click "SAVE PAYMENT METHOD"



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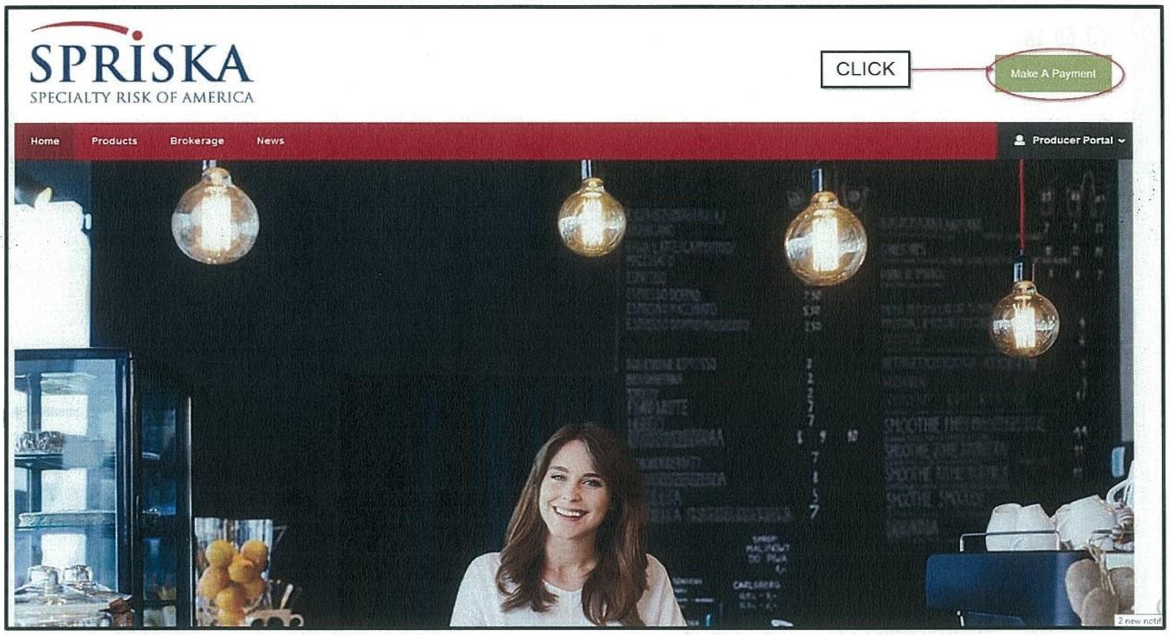
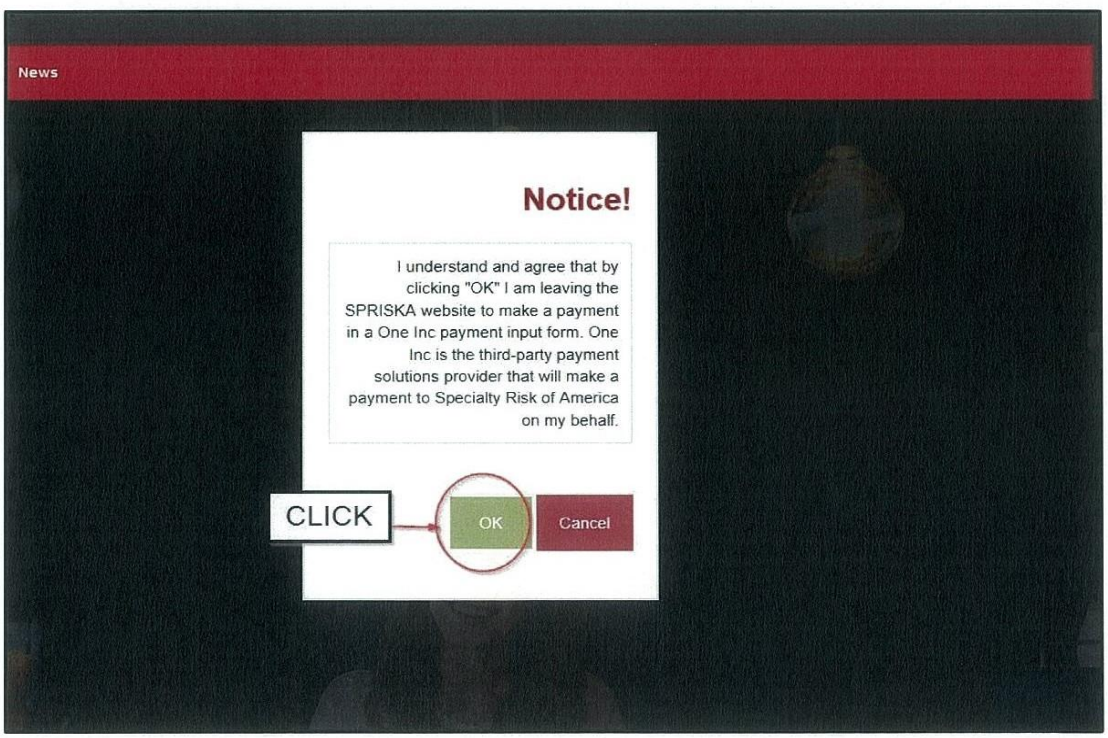
Producer Process for Updating Current Accounts Enrolled in AutoPay

Step 1: Go to Spriska Website at w www.spriska.com

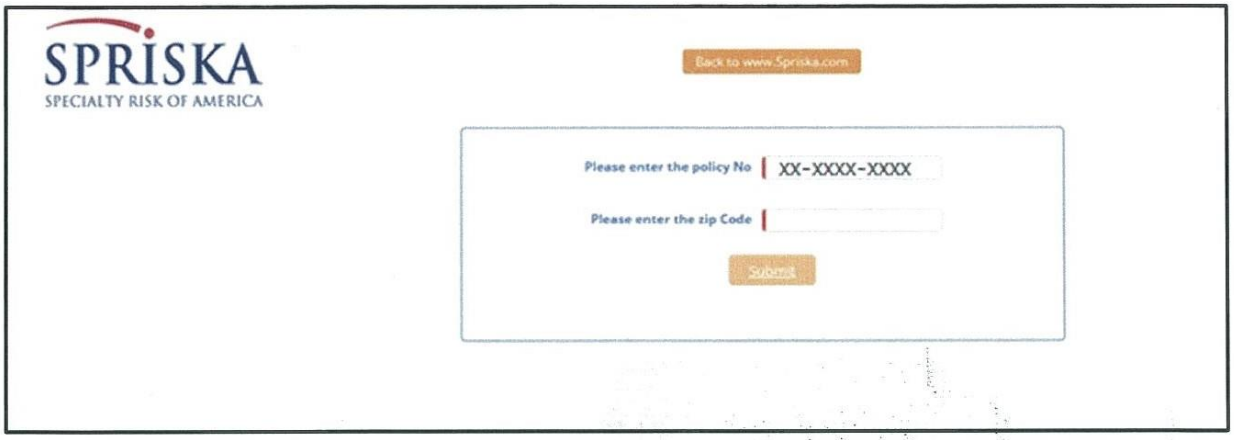
Step 2: Click "MAKE A PAYMENT"



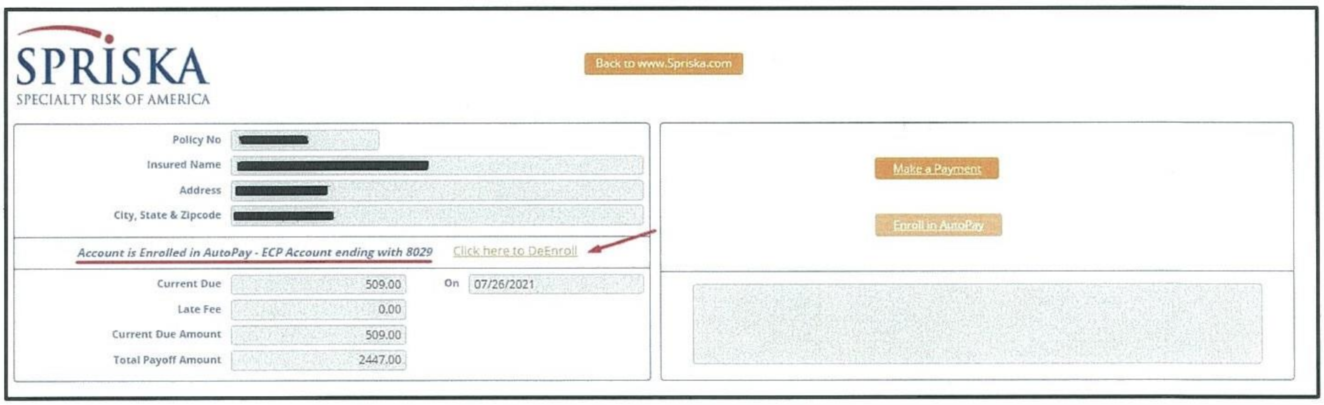
Step 3: Click "OK" to proceed



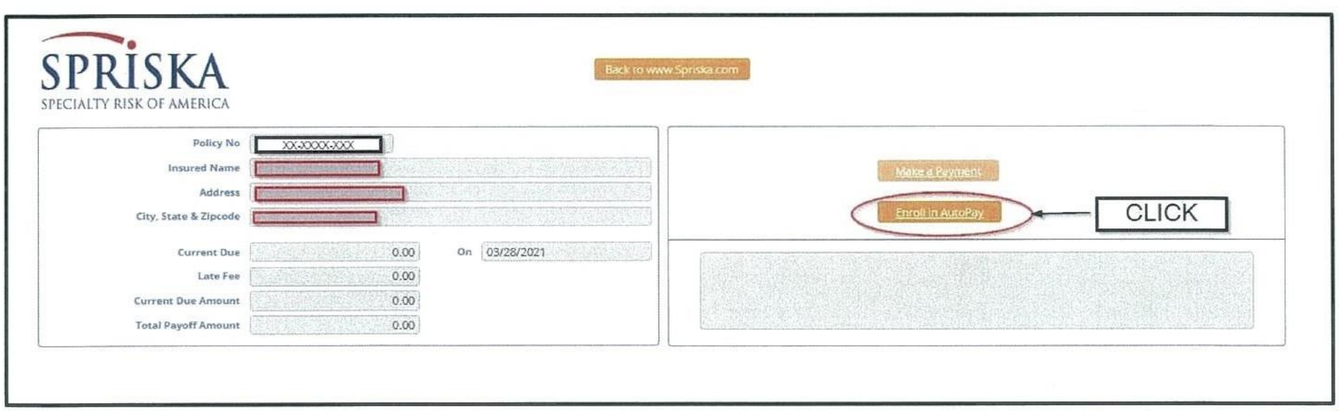
Step 4: Enter policy number (with **" – "** between numbers) and zip code of insured's address



Step 5: Account Information - Click "Click here to De-enroll"



Step 6: Click **"**Yes"



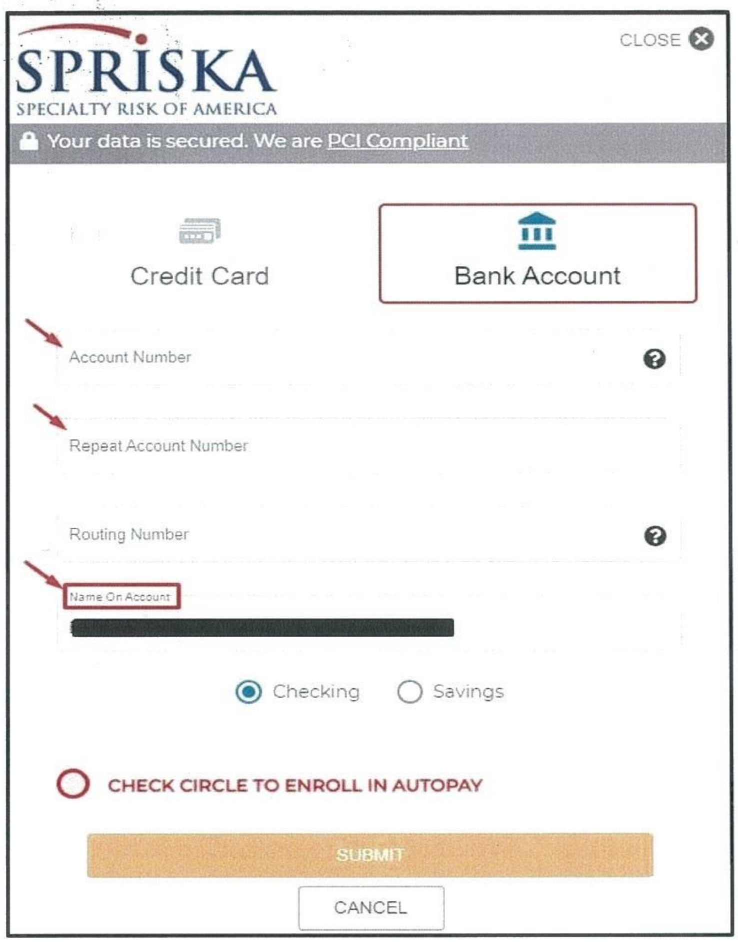
Step 7: Click "Enroll into AutoPay"

Step 8: Enter Account or Credit/Debit card information

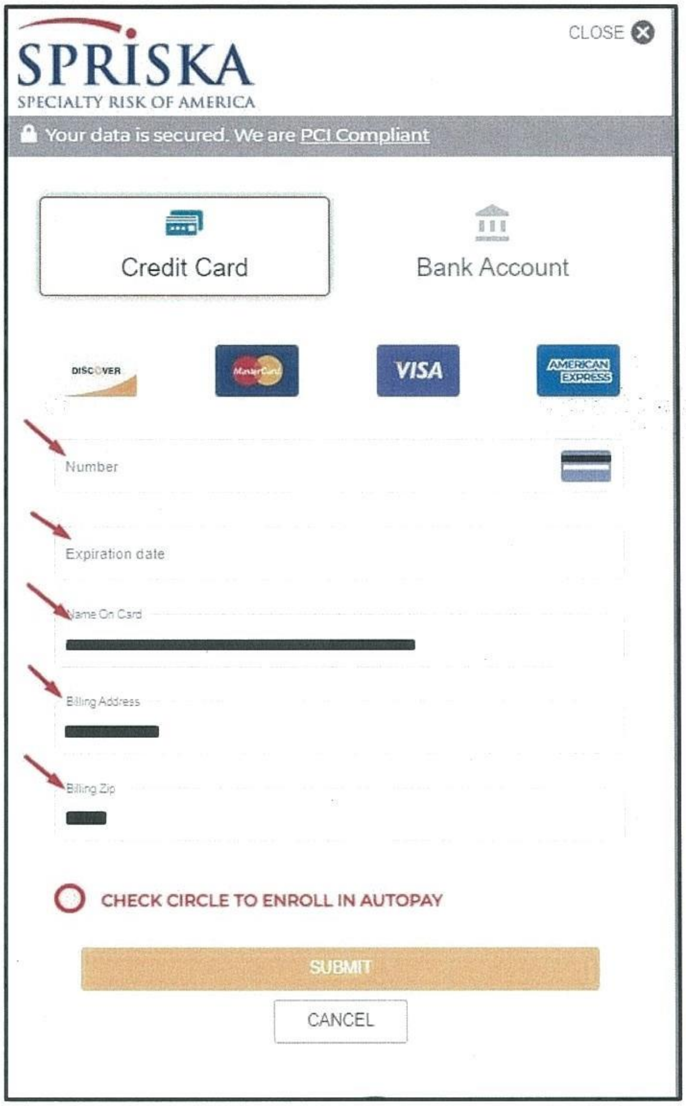
Options:

1. Bank Account (no transaction fee charge)
2. Credit card/Debit card (a 3.5% processing fee is applied to each transaction)
   - VISA
   - MASTER
   - AMERICAN EXPRESS
   - DISCOVER

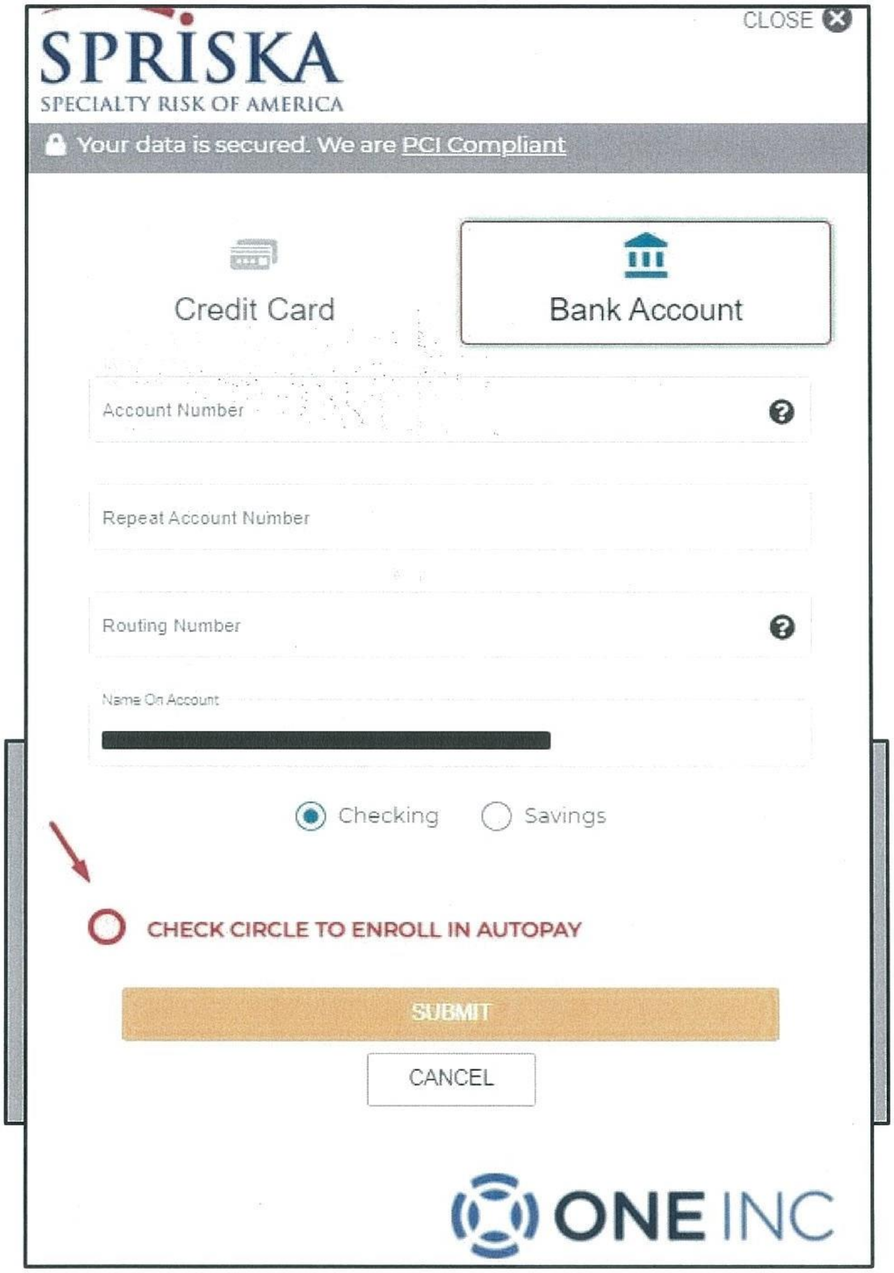
Step 8-1: Bank Account - Enter Account Number &Routing Number.Edit the name on checking account if needed



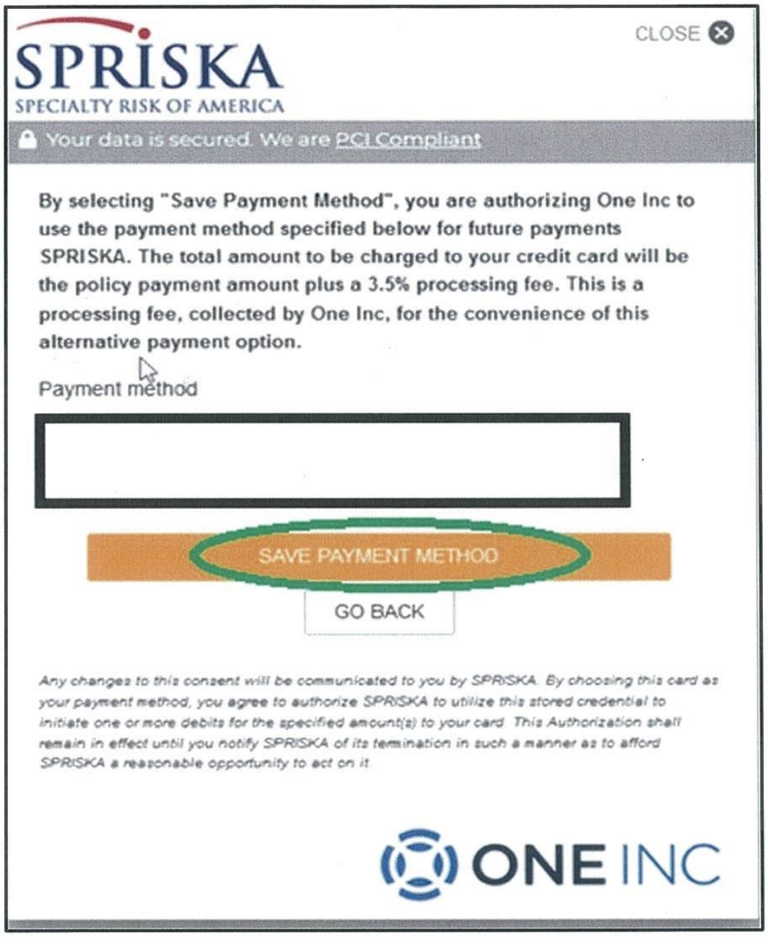
Step 8-2: Credit card - Enter card number & expiration date. Edit the name on card, billing address and zip code if needed.



Step 9: Click **"Check Circle to Enroll in AutoPay"** → click **"SUBMIT"**



Step 10: click "SAVE PAYMENT METHOD"



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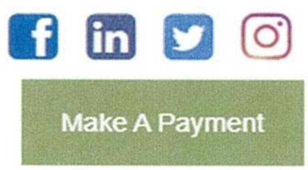
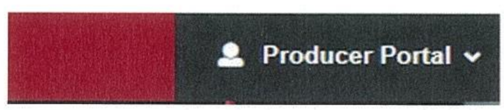
PROCESS TO DE-ENROLL POLICY FROM AUTOPAY

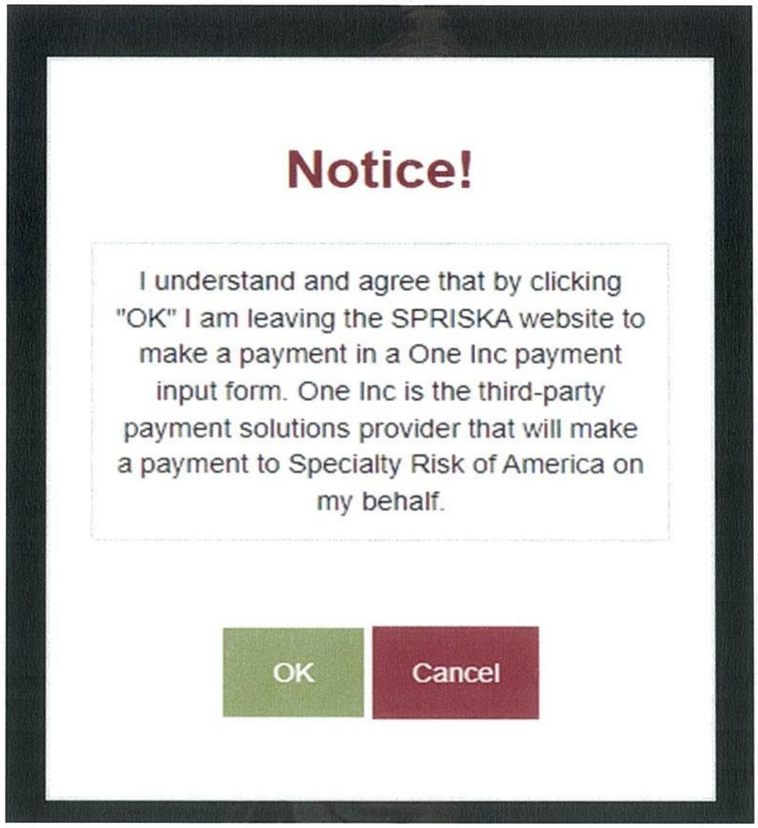
Go to SPRISKA website using www.spriska.com

Click on **MAKE A PAYMENT** button





Click **OK** after reading **Notice!**



Enter policy number using 10-digit sequence, i.e., 10-2020-xxxx or CPPxxxxxxx

Enter policy billing zip code

Click **Submit**

****This screen can be a reference for the account used to enroll in autopay showing the last four digits of the account

To remove autopay from policy, use the **Click here to DeEnroll** button below

Policy No	10-2016-[redacted]		
Insured Name	[redacted]		
Address	[redacted]		
City, State & Zipcode	[redacted], 60517		

Account is Enrolled in AutoPay - CC Account ending with 9370 Click here to DeEnroll

Current Due	214.00	On	08/31/2022
Late Fee	0.00		
Current Due Amount	214.00		
Total Payoff Amount	214.00		

Once de-enroll is processed, the system will return to previous screen to select another transaction or choose to exit.

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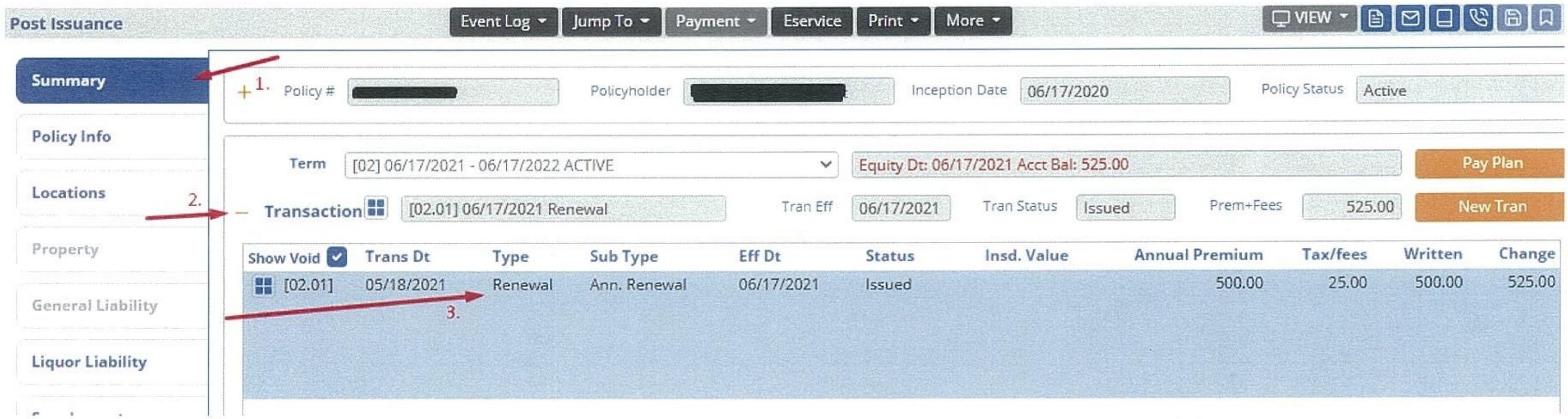
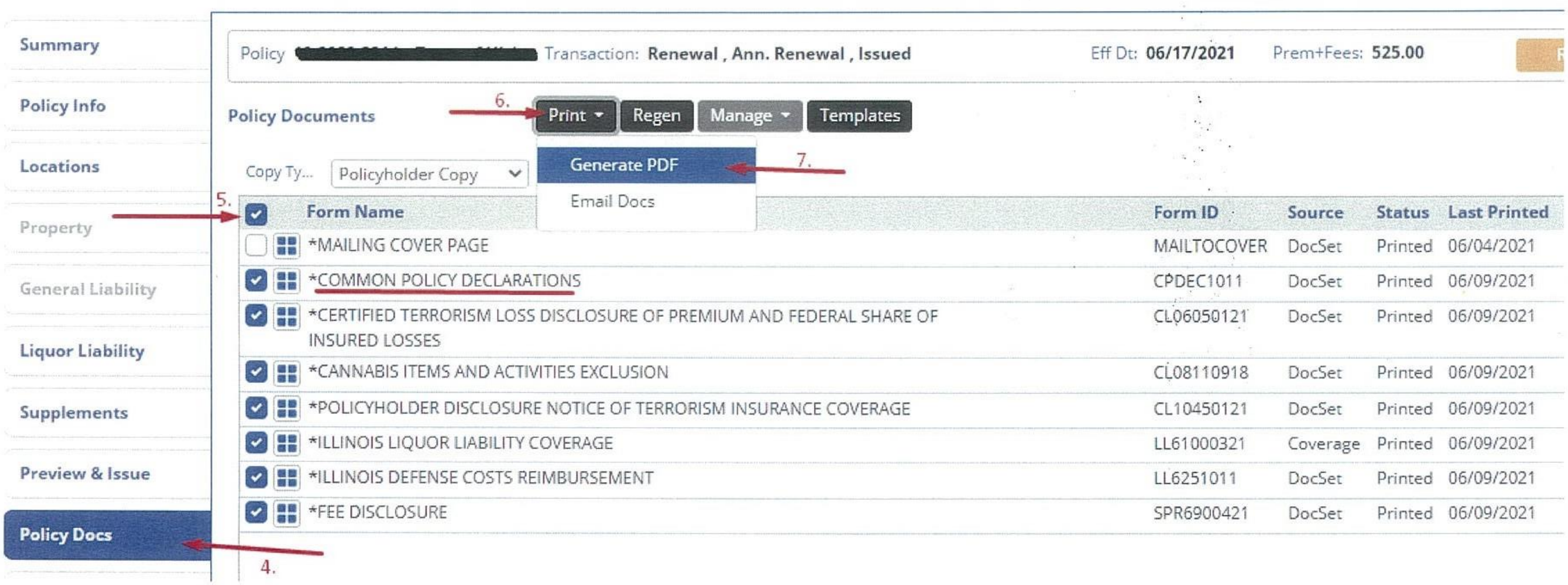
Printing Documents in Simple Inspire:

1. Pull up the policy in Simple Inspire, this will open the Summary Tab.
2. Click the orange + next to Transaction.
3. Click on the document you want to print (Ex: renewal, endorsement etc.) it will become highlighted in blue on the transaction drop down.
4. Click the Policy Docs tab in blue.
5. Click on form name to check all boxes or if you only want the dec pages, check only the box next to Declarations.
6. Click the print button.
7. Click Generate PDF or Email if you want to email it.





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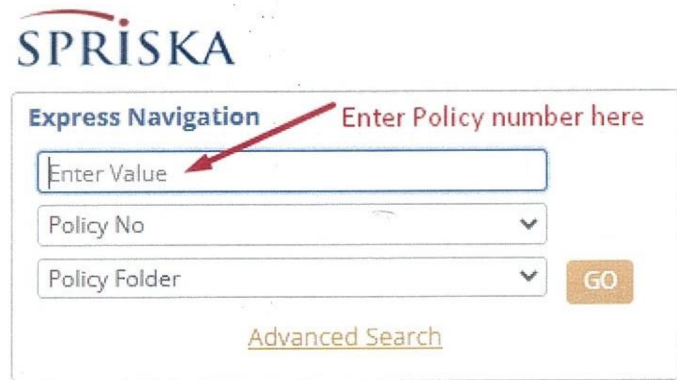
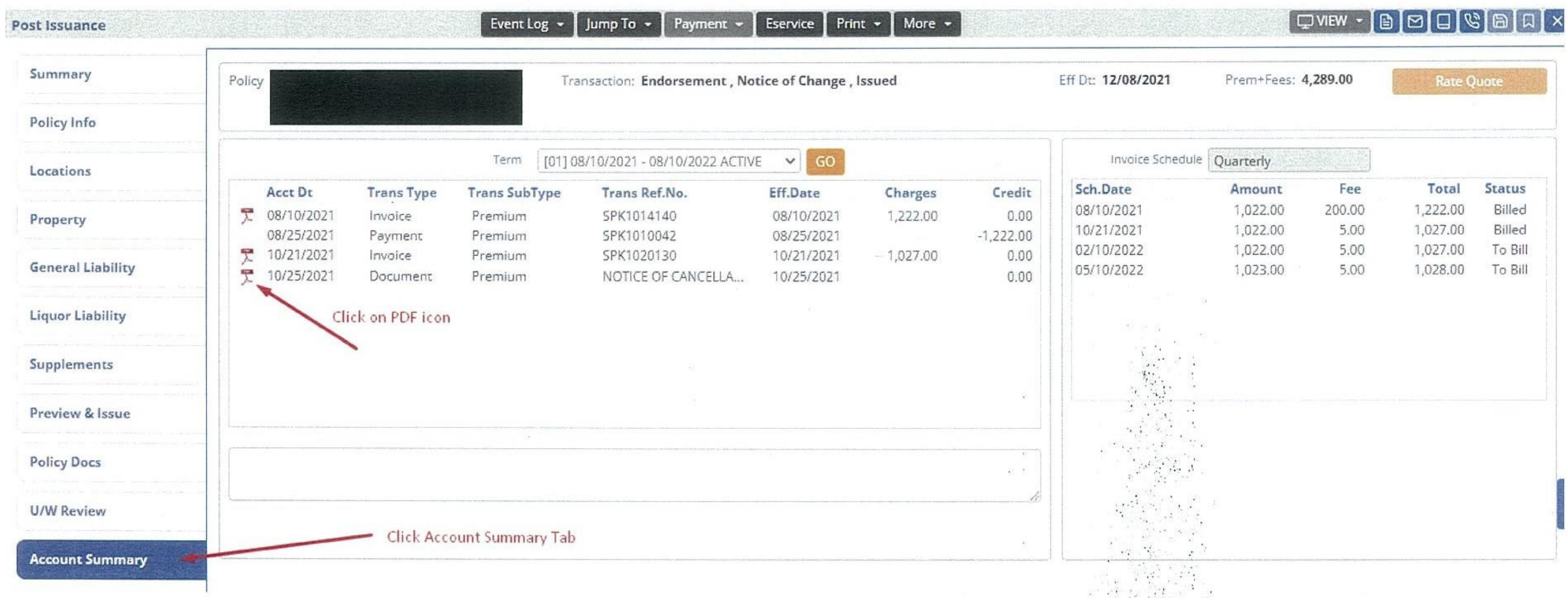
PRODUCER ACCESS TO POLICY INVOICES AND NOTICES

1. Using a pre-assigned user ID, open Simple Inspire
2. Enter policy number
3. Go to Account Summary Tab (last tab on bottom of tab list)
4. Click on PDF icon to view selected document
   - Invoice – current premium billed and due
   - Notice of Cancellation – notification of late invoice payments
   - Rescission Notice – notification late payment has been received
   - Past Due Notice – notification of late payment for a renewal policy not made prior to renewal date
5. Print or email document as needed





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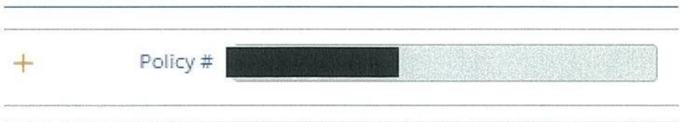
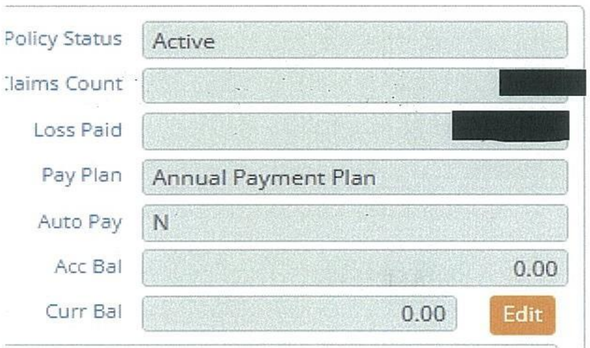
PROCESS TO UPDATE AGENT ASSIGNED TO ACCOUNT

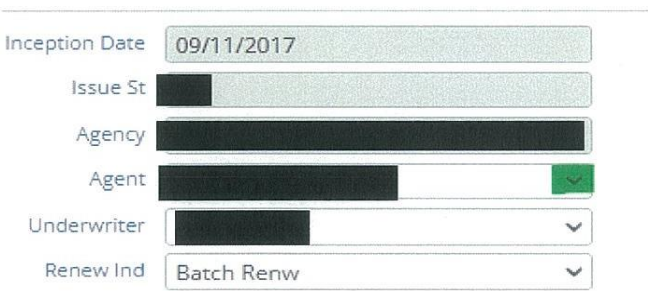
Click **+** to open the top widget box



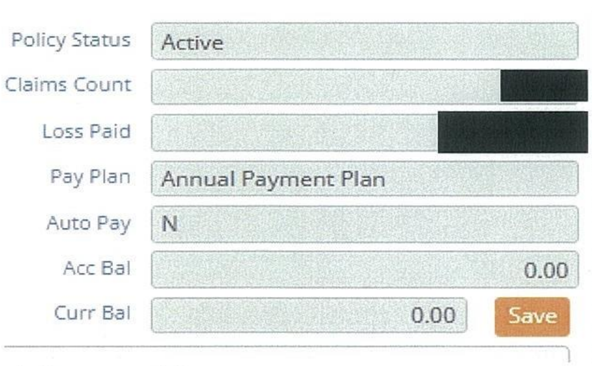
Click **Edit** button in far-right bottom corner.



This will open **Agent** field.



Using the dropdown, choose the applicable **Agent** name.



Click **Save** and done.

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PROCESS TO UPDATE EMAIL ADDRESS IN SIMPLE INSPIRE

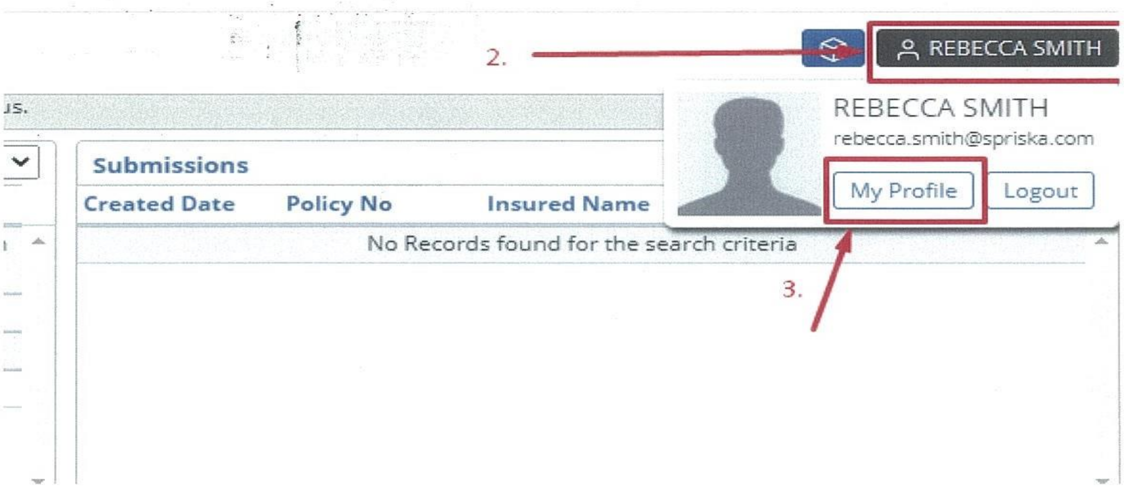
Go to the Desktop (first page that opens when logging in)

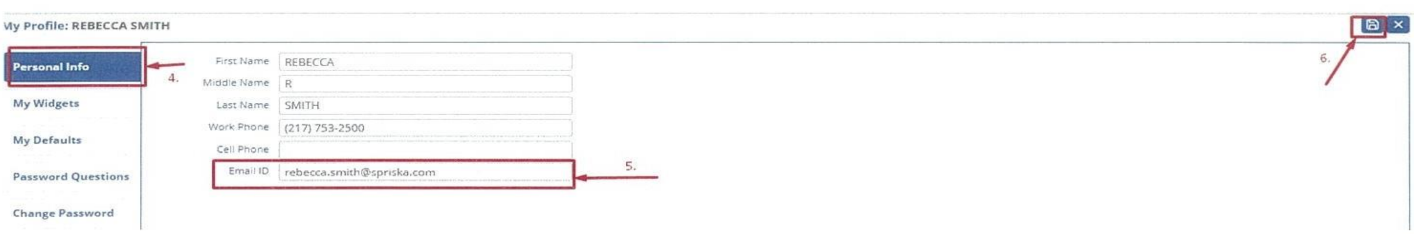
Click your Name in the black box in the top right corner

Click My Profile

On Personal Info page you can change the email

Then click the save icon in the top right corner.





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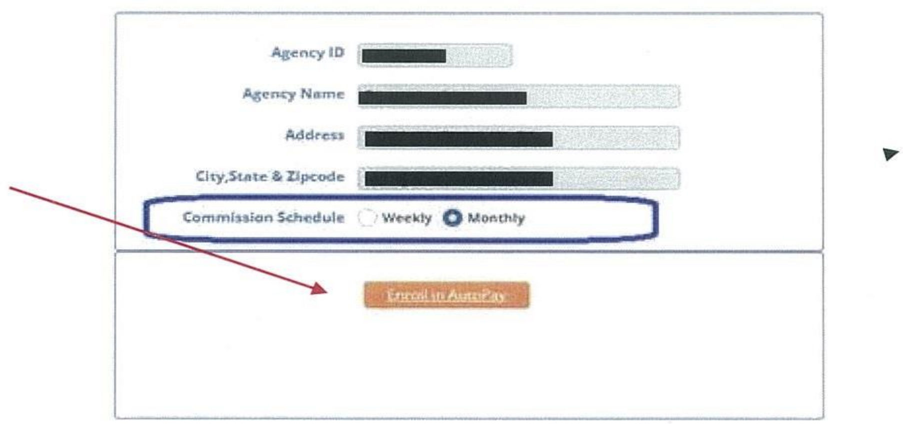
Steps on How-To Enroll in ACH Weekly or Monthly Commission Payments

Log into SimpleSolve. As a designated Administrator for your agency, a red bank icon should be present in the upper right side of your home page screen.

Click on the "RED BANK ICON" to get started in enrollment process.

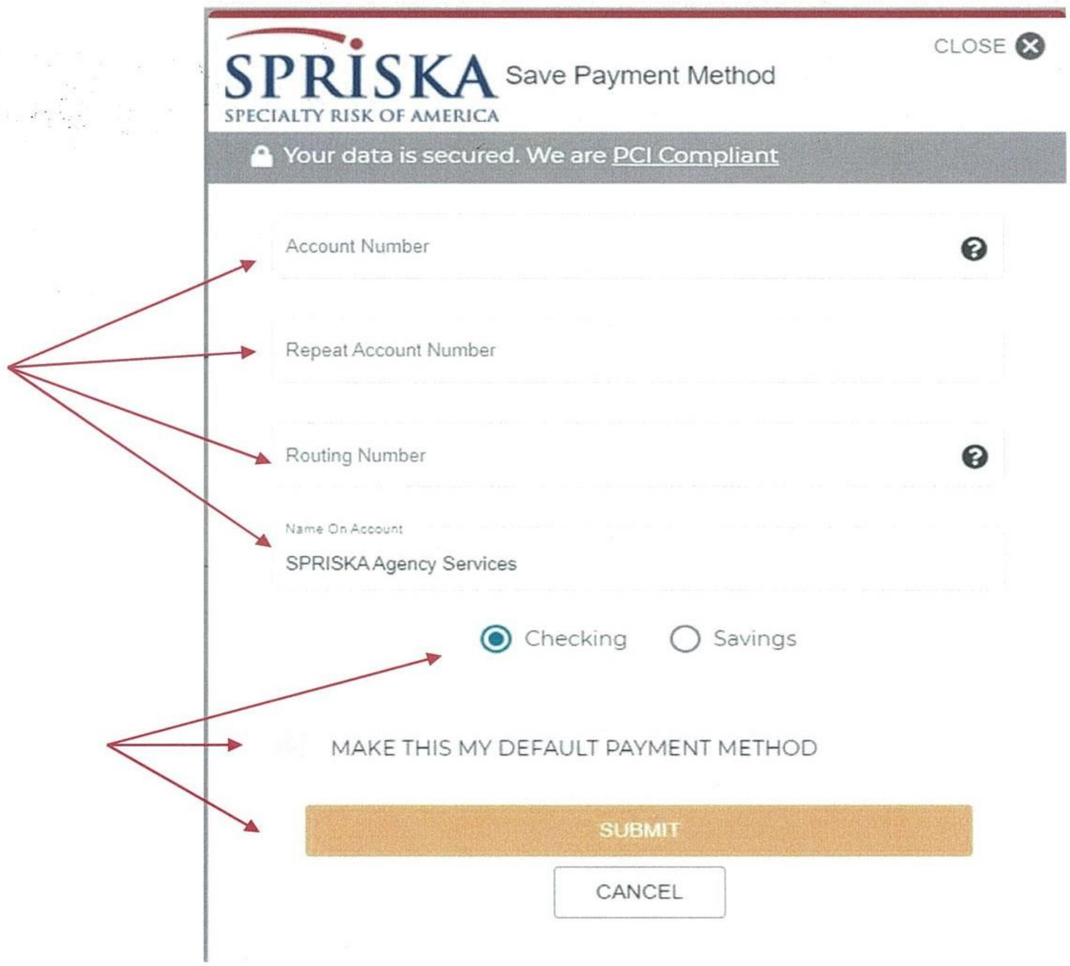
Select Commission Schedule – Weekly or Monthly. Then, click "ENROLL IN AUTOPAY"



Complete the required information using the bank information to receive the deposit of your weekly/monthly commission payments.

Take a moment to verify the accuracy of the information.

Click "SUBMIT"

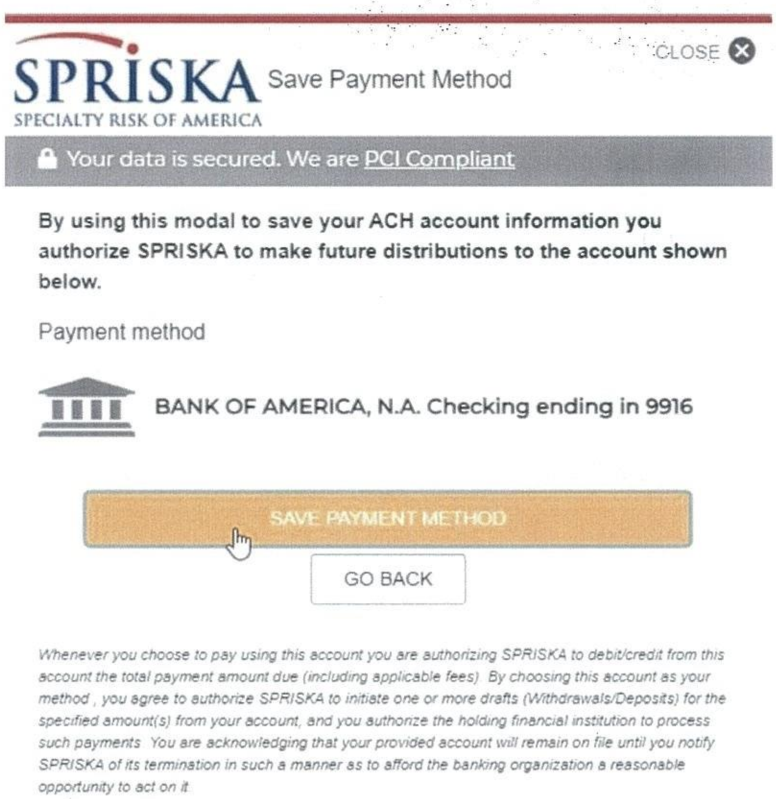


Ensure account information is correct.

Confirm the selection for weekly or monthly commission payments is marked properly. ***Once the selection is stored, an email to customerservice@spriska.com is necessary to request IT support to update.***

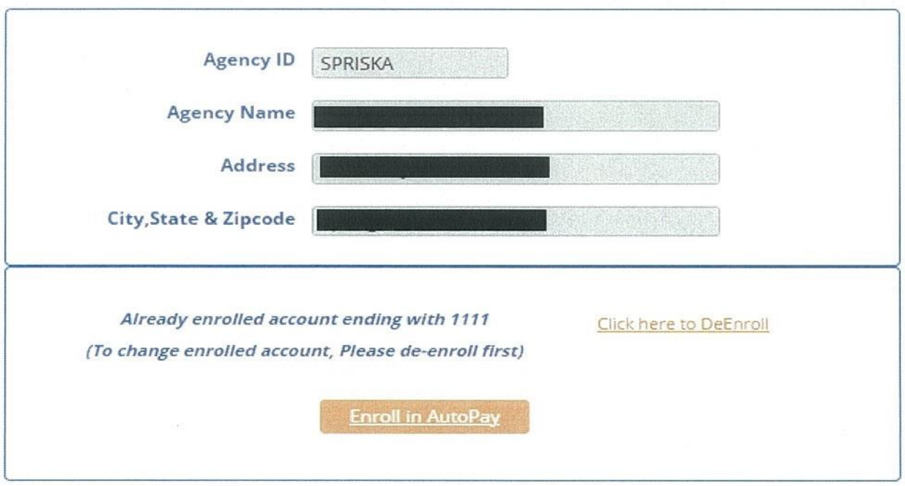
Click "GO BACK" button if changes needed.

Click "SAVE PAYMENT METHOD" button.



Notification the payment method selected was saved successfully. Click "CLOSE".

Process is complete. An email will be sent from SPRISKACustomerCare to confirm the enrollment.



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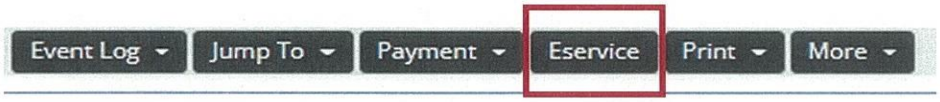
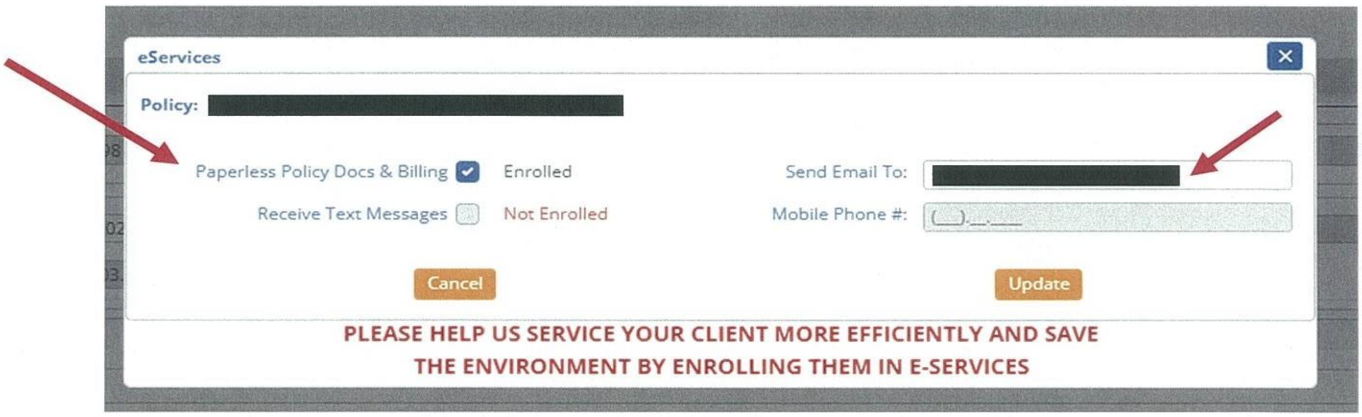
PROCESS FOR SELF-SERVICE PORTAL

<u>INITIATING eSERVICES FOR PORTAL ACCESS</u>

Policyholder elects eServices for Paperless Policy Docs & Billing and provides email address (or mobile phone number for text messages) and Simple Inspire is updated as requested by an authorized user by selecting the Eservice button found on the policy





Policyholder receives email: ***Please check and sign in the document – Signature requested by Specialty Risk of America*** **to Please review and sign the document**

Policyholder receives second email once document is signed: ***You just signed Please check and sign in the document*** **indicating You have successfully signed your document**

A series of activities are loaded in the Event Log in the Policy Folder to reflect the eSign process

Date	Event	Short Description
10/08/2021	Diary	10-2020-2598 : eSigned eDelivery Consent Received
10/08/2021	Activity	Insured has eSigned the ELECTRONIC DELIVERY CONSENT FORM through HelloSign
10/08/2021	Activity	Insured has viewed the ELECTRONIC DELIVERY CONSENT FORM through HelloSign
10/08/2021	Activity	ELECTRONIC DELIVERY CONSENT FORM was sent for Signature through HelloSign to email address sharon.ke

The email address entered in Policy Folder will need to be the same for policyholder to set up and access their account successfully

Policy #	[redacted]	Policyholder	[redacted]		
Type	Commercial Package	Phone-Home	(__)__-__		
Issue Co.	[redacted]	Phone - Work	[redacted]		
Email-Policy	Enrolled	Phone-Cell	(__)__-__		
Email-Invoice	Not Enrolled	Email	[redacted]		
Text Opt In	N	App Signed	No	Ph Portal Enrolled	N

If the email address is different, the owner of the email listed will need to set up access to account

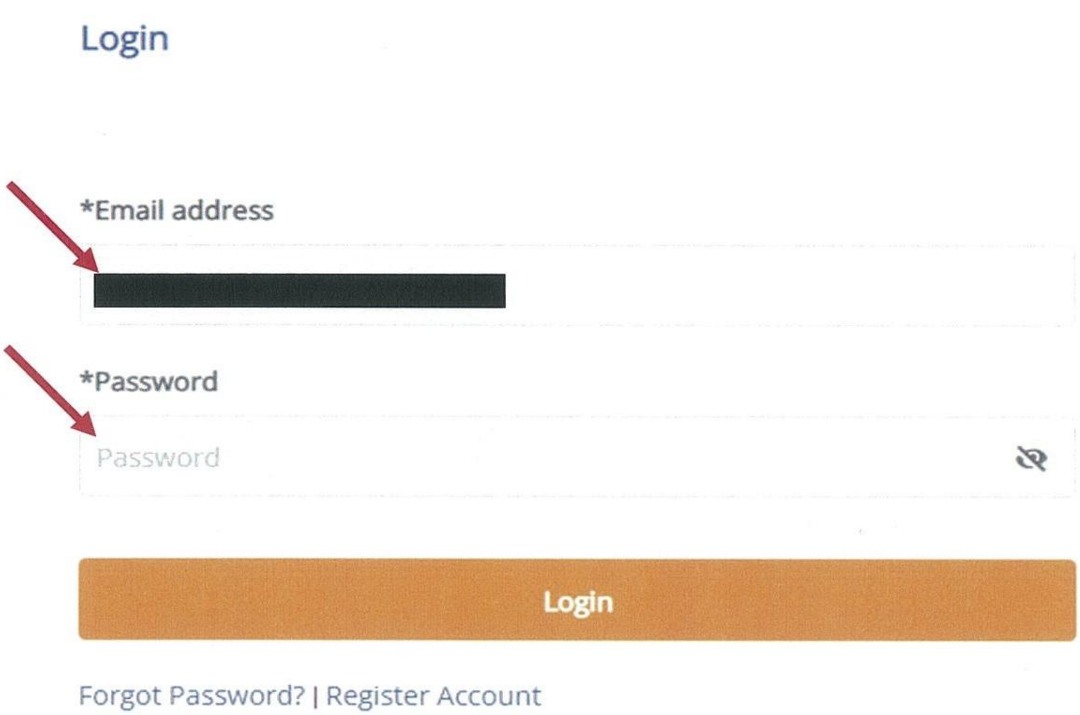
The email can be edited by either producer, their representative or SPRISKA staff with proper authorization

Initial process has been completed and the policyholder is ready to set up their policyholder portal access

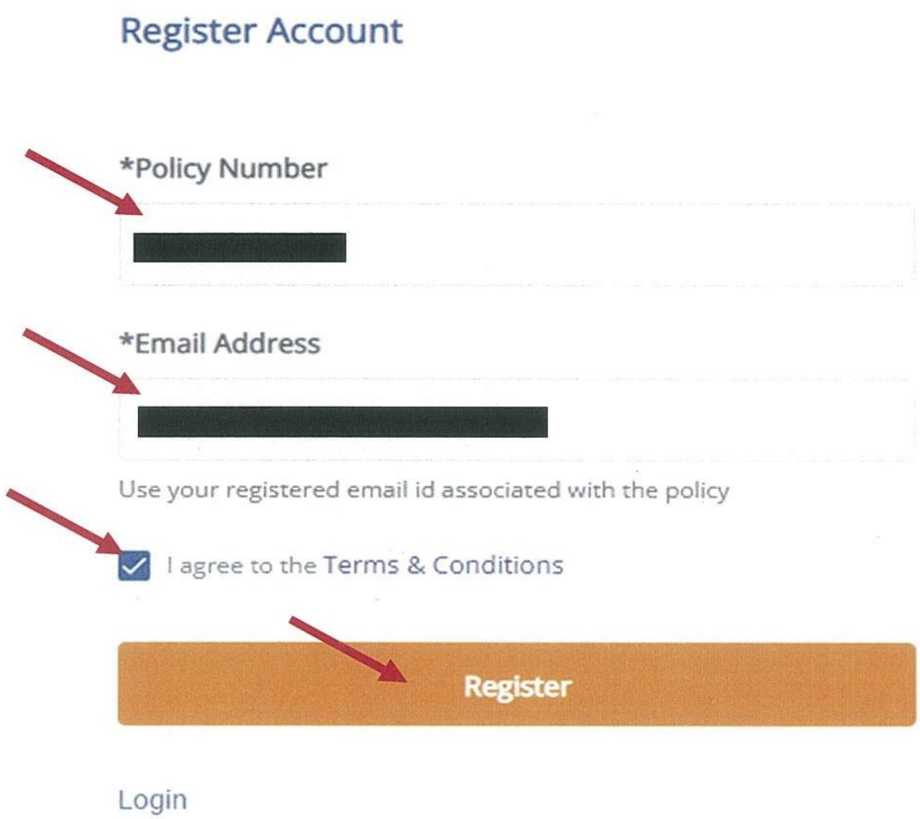
SETTING UP ACCESS FOR POLICYHOLDER PORTAL

Go to SPRISKA website and click on Policyholder Portal

Enter applicable email address noted on policy in Simple Inspire. If initial inquiry, click Register Account and follow prompts. Otherwise, enter password and click Login



Enter policy number and applicable email address. Click box for Terms & Conditions once reviewed and click register



Receive acknowledgement of a successful registration

Account has been successfully registered.

Your account has been successfully registered. Please check your email for a validation request.

Login

Receive message indicating registration authorization process completed successfully prompting an email to be sent to the email address used to register account

Registration authorization process completed successfully

Login

Email received confirming registration and instruction to click URL included in email to set password

Confirm your request to Register this policy to your account: [redacted]

SpriskaCustomerCare <DoNotReply@spriska.com>
To [redacted]

Reply | Reply All | Forward | ...

Wed 10/13/2021 1:31 PM

The policy number referenced in the subject of this email has been successfully added to your account. Please click on the URL below to authorize the registration.

https://policyholder.spriska.com/[redacted]

If you did not request to register this policy to your account, please contact your Insurance Agency or Broker.

Thank you
Customer Services Team
SPRISKA

Enter New Password and Confirm Password and click Set Password

Registration Confirmation

*New Password

••••••••••••••

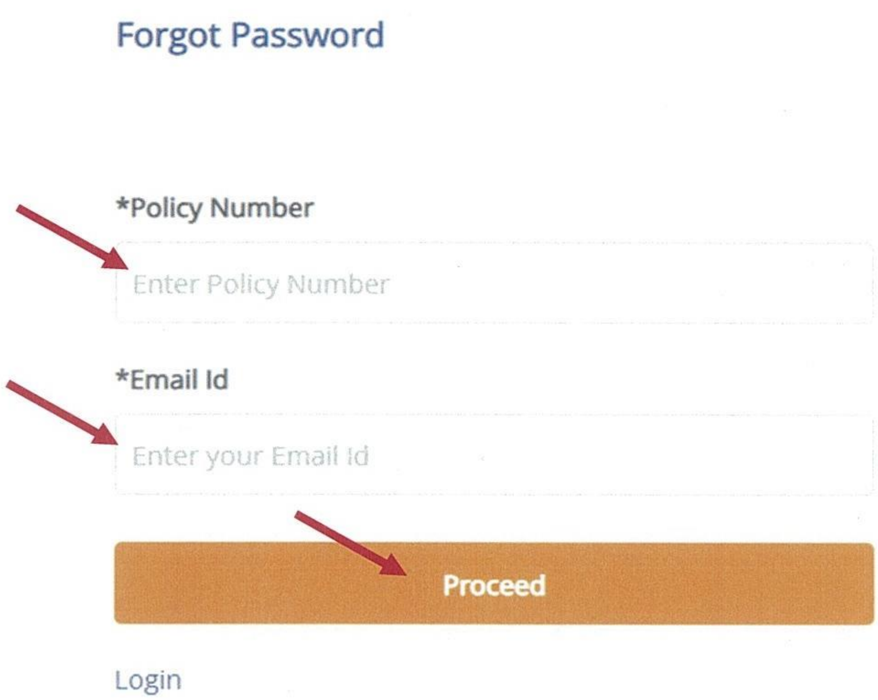
Use 8 or more characters with a mix of letters, upper, lower, numbers & symbols #, $, -, !, (,)

*Confirm Password

••••••••••••••

Set Password

To reset password, click Forgot Password and follow prompts

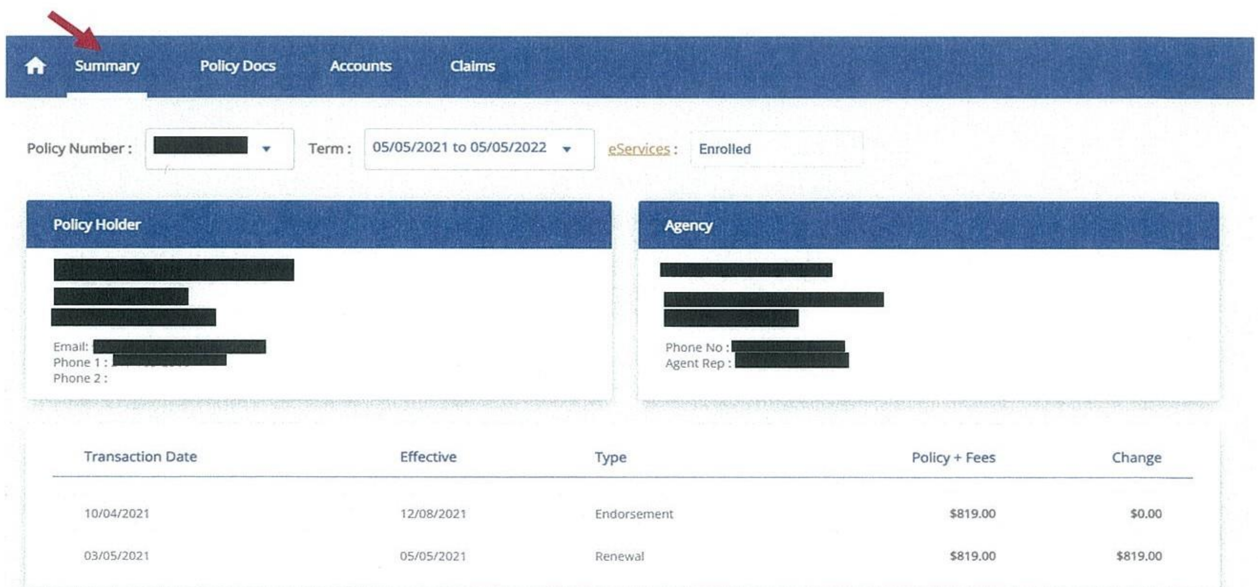


Setting up access to the account in Policyholder Portal is complete and policyholder ready to view their account portal

Welcome to the Policyholder Portal

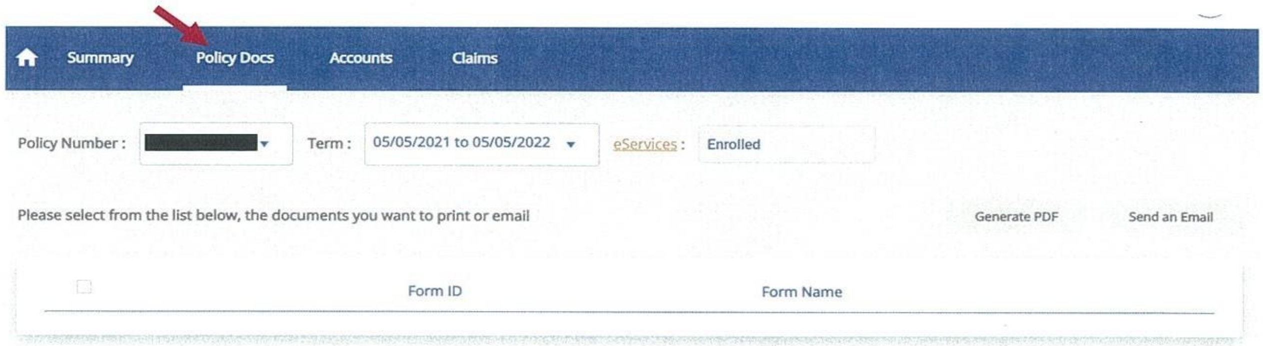
MY POLICIES screen following successful inquiry to account. From this screen, the insured can add a policy (above box in orange) if they have multiple policies; view the Premium for the policy, Current Due, Account Balance, View More Details; and, status (in this case showing PAID)

Click on View More Details (Summary tab indicated by white line under tab)



Overall view shows the carrier and producer on the policy and transaction history for term period selected. eServices (in orange): enrolled. Select any of the tabs across the top for additional information: Policy Docs, Accounts, Claims

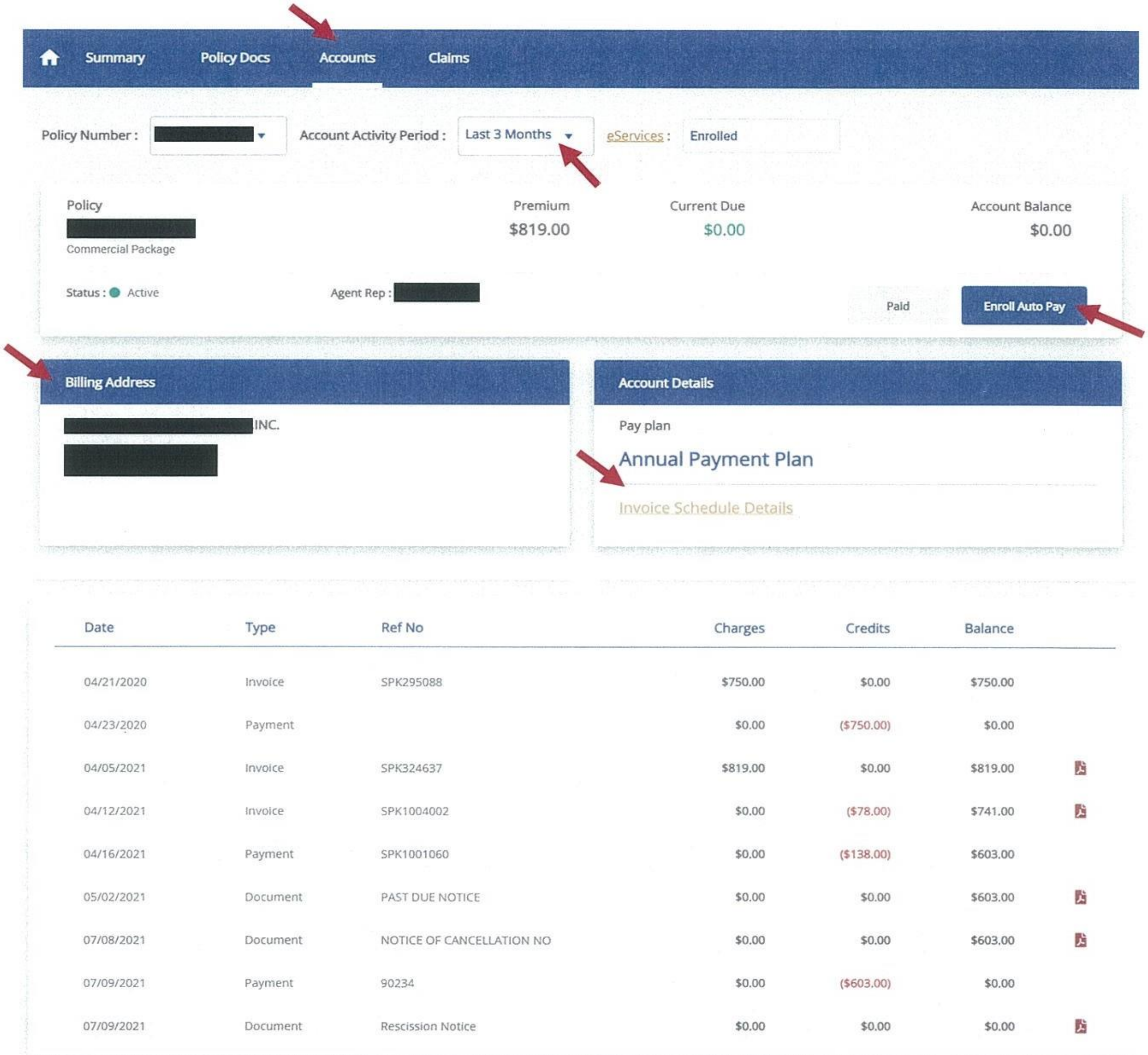
Click on Policy Docs Tab



In this tab if policy documents were loaded to site, they could be selected individually or collectively. A PDF could be generated (click on associated button) to be printed or emailed (click on Send an Email button).

Click on Claim Tab – This is out of sequence since screen shot was shorter than the Accounts Tab

Click on Accounts Tab



Date	Type	Ref No	Charges	Credits	Balance
04/21/2020	Invoice	SPK295088	$750.00	$0.00	$750.00
04/23/2020	Payment		$0.00	($750.00)	$0.00
04/05/2021	Invoice	SPK324637	$819.00	$0.00	$819.00
04/12/2021	Invoice	SPK1004002	$0.00	($78.00)	$741.00
04/16/2021	Payment	SPK1001060	$0.00	($138.00)	$603.00
05/02/2021	Document	PAST DUE NOTICE	$0.00	$0.00	$603.00
07/08/2021	Document	NOTICE OF CANCELLATION NO	$0.00	$0.00	$603.00
07/09/2021	Payment	90234	$0.00	($603.00)	$0.00
07/09/2021	Document	Rescission Notice	$0.00	$0.00	$0.00

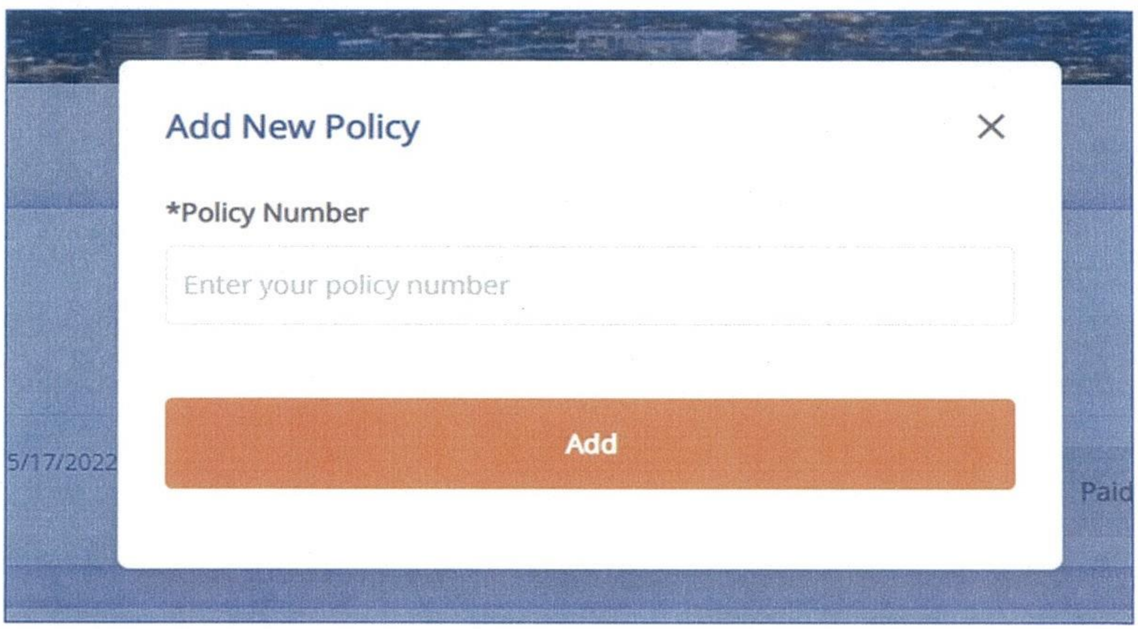
From the Accounts Tab, you can select Account Activity Period drop down to show choices of Last 3 months, 6 months or 12 months. The policyholder can enroll in auto pay by clicking the button in upper right portion of the screen.

It shows the billing address where the policyholder would receive any manual documents or correspondence. It has Account Details for the Pay plan selected. For this policy the pay plan is an Annual Payment Plan. If the pay plan selected would have installments, the Invoice Schedule Details (in orange) would show the details for the installments, such as bill and due dates along with amount

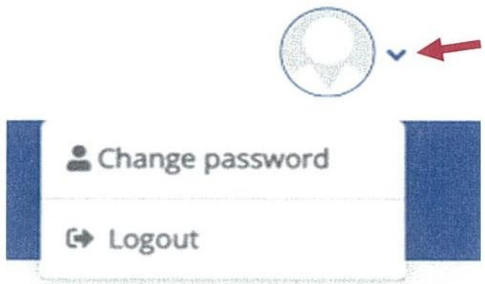
due for each invoice. The bottom portion shows account transaction history and provides a PDF version of related notices/invoices for policyholder to view, print or email.

An insured can add a new policy to a registered account by clicking on Add a New Policy on my policies screen.

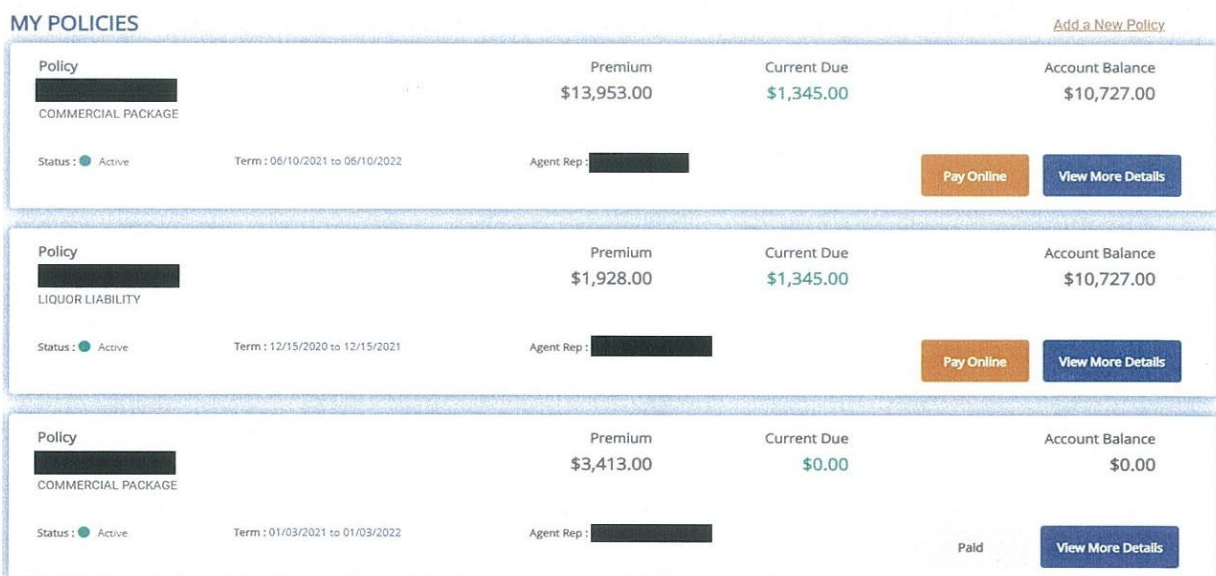
Enter the policy number associated with the same email address



Use the drop down to logout or change password



EXAMPLE OF ACCOUNT WITH MULTIPLE POLICIES



Summary | Policy Docs | Accounts | Claims

Policy Number : [redacted] Term : 06/10/2021 to 06/10/2022

Policy Holder

[redacted]

Email: [redacted]
Phone
Phone 2 :

Agency

[redacted]

Phone No :
Agent Rep : [redacted]

Transaction Date	Effective	Type	Written Premium	Change
06/10/2021	06/10/2021	New Business	$13,953.00	$13,953.00

Summary | Policy Docs | Accounts | Claims

Policy Number : [redacted] Term : 06/10/2021 to 06/10/2022

Please select from the list below, the documents you want to print or email

Generate PDF | Send an Email

	Form ID	Form Name
	CPDEC1011	COMMON POLICY DECLARATIONS
	SPR20501220	SUPPLEMENTAL DECLARATIONS-DATA COMPROMISE

Summary | Policy Docs | Accounts | Claims

Policy Number : [redacted] Term : 06/10/2021 to 06/10/2022

Claim Number	Claim Type	Loss Date	Reported	Loss Paid	Status

Summary | Policy Docs | Accounts | Claims

Policy Number : [redacted] Account Activity Period : Last 3 Months

Policy	Premium	Current Due	Account Balance
[redacted] Commercial Package	$13,953.00	$1,345.00	$10,727.00

Status : Active

Agent Rep : [redacted]

Pay Online

Enroll Auto Pay

Billing Address

[redacted]

Account Details

Pay plan

20% + 8 Monthly Payments

Invoice Schedule Details

Date	Type	Ref No	Charges	Credits	Balance
06/10/2021	Invoice	SPK1008572	$3,231.00	$0.00	$3,231.00
06/26/2021	Document	NOTICE OF CANCELLATION NO	$0.00	$0.00	$3,231.00
06/26/2021	Document	PAST DUE NOTICE	$0.00	$0.00	$3,231.00
07/01/2021	Document	ENROLLED	$0.00	$0.00	$3,231.00
07/02/2021	Payment	SPK1006943	$0.00	($3,231.00)	$0.00
07/02/2021	Document	Rescission Notice	$0.00	$0.00	$0.00
07/21/2021	Invoice	SPK1012268	$1,345.00	$0.00	$1,345.00