



# Texas Security General

## INSURANCE AGENCY, LLC.

**FINAL REMINDER**

**Emailing AGENT Documents**  
**PERSONAL LINES ONLY**  
(INSURED documents will continue to be mailed via USPS)  
Effective January 1, 2019

### **Important Update – Please Read Carefully**

#### **How does this update effect my agency?**

**Effective January 1, 2019 Agents will receive all policy documents via email.**

You will no longer receive hard copy policy documents via the USPS.

**INSURED documents will continue to be mailed by TSGA via the USPS.**

#### **When does this update take place?**

This update will be effective 1-1-19. We have tested this process for one year with a group of select Agents. The feedback has been positive and has created another step in our *ease* of doing business. We ask that you make any necessary updates to your Agency's internal process to ensure policy documents are viewed/retrieved as necessary.

#### **Is this update for Personal Lines only?**

Yes, this update is only for Personal Lines policy documents. Commercial Lines policy documents will continue to be sent via email as per usual.

#### **What email will be used to send policy document notifications?**

The default email currently on file for your Agency will be used to send notifications. If you would like this email updated at any time, please email [michellet@txsecgen.com](mailto:michellet@txsecgen.com) and she will update your Agency profile.

#### **Will I receive a notification when policy documents are generated and ready?**

Yes, you will receive an email notification that lists named insured and what policy documents are ready for your viewing/retrieval. This email will come from [underwriting@txsecgen.com](mailto:underwriting@txsecgen.com). Please be sure this email is on your Agency's approved email list to avoid it from being blocked or going to SPAM.

#### **How often will my documents be available for viewing or downloading?**

Agency policy documents will be available 24/7. An email alert will be sent to the primary agency email on file on Monday/Wednesday and Friday of each week **IF** policy documents were generated on those days for your Agency.

**How can I access policy documents?**

You will be able to access policy documents 24/7 by going to [www.texassecuritygeneral.com](http://www.texassecuritygeneral.com) and logging into the Personal Lines (log in to get a quote) tab located on the right side of your screen. Please refer to the attached **HOW TO** document for step by step instructions.

**Will it be my Agency's responsibility to distribute policy documents to my Insureds?**

No. At this time TSGA will remain responsible for the timely distribution of policy documents to your insureds. There is NO change with insured documents.

**How will my Insured know when a new policy/renewal needs to be paid?**

TSGA will continue to mail out all INVOICES via the USPS to your Insured along with a pre-addressed blue envelope for them to send in their payment. There is NO change with this process.

**Will Renewal offers continue to be sent to my Insured?**

Yes, renewal offers/invoices will be mailed USPS by TSGA, there is NO change in this process.

**Will Notice of Cancellation (NOC) and Non-Renewal notices (NOR) still go out to the agent and insured as usual?**

Yes, NOC's and NOR's will continue to go out to the Agent AND the insured via USPS certified mail on a daily basis.

**Will we be notified when notices are sent to the insured or mortgage companies?**

Yes, this will be part of the notifications that you receive when policy documents are available for your viewing/retrieval.

**How does this change affect Direct Bill customers?**

TSGA will continue to direct bill the insured/mortgage company without interruption or change.

**Can documents be automatically emailed to the Agents when they are ready?**

TSGA is currently working on Phase 2 of this project and that does entail emailing the actual policy documents to the Insured and the Agents if email addresses are available on file. We will keep you up to date on our progress.

**Please note:** Effective 1-1-19 TSGA will be asking for your **Insured's email address** on all new business applications. This will allow us to email documents to your insured in the future.

[www.texassecuritygeneral.com](http://www.texassecuritygeneral.com)

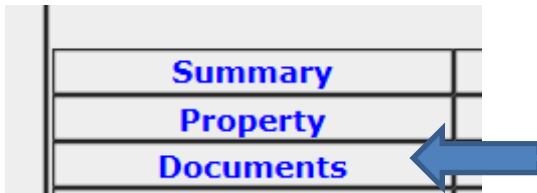


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### ISI Printing Instructions

- 1) Bring policy up in ISI
- 2) To Print Declarations, Applications, Invoices, Click on Documents (Blue Letters) in slender boxes on the right side of screen



- 3) ¾ of screen will change, and a list of all documents will appear -

\* To print declaration- click on the policy period

Decpages							
	Policy Period	Effective Date	Issued	Cancel Date	Reason	Total Premium	Full Policy
1.	<a href="#">06/12/2018 - 06/12/2019</a>	06/12/2018	06/18/2018			\$500.00	<a href="#">Policy</a>

\* To print an invoice, click on due date- make sure it is New or Ren

Invoices			
	Due Date	Type	Policy Period
1.	<a href="#">07/02/2018</a>	NEW	06/12/2018 - 06/12/2019

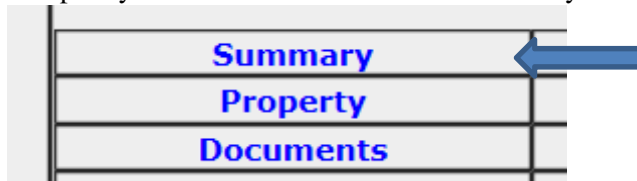
\*To print an Application, click on the Policy period.

Applications				
	Policy Period	Effective Date	Issued	Total Premium
1.	<a href="#">06/12/2018 - 06/12/2019</a>	06/12/2018	06/18/2018	\$500.00

- 4) Once you have selected the document that a copy is needed, ¾ of screen will change with the document you selected. A button will appear on the left side (Print Copy)



- 5) The policy and endorsements can be obtained by Clicking on Summary (blue letters)



- 6) Once you click Summary, ¾ screen changes to summary of coverage, scroll down using the scroll bar on the right side of the screen until you see “Other Endorsements and Coverages Schedule”

#### **Other Endorsements and Coverages Schedule**

- 7) The policy and all endorsement will be in Blue Letters, these are links which enable you to be able to open and print each one.