



EZStone USER GUIDE

Stonetrust Agency Application Portal and Underwriting Management System

NEW EZSTONE HOMEPAGE

The screenshot shows the Stonetrust web application interface. At the top, there is a navigation bar with the Stonetrust logo, a 'Home' link, a 'New Submission' button, and user profile information. Below the navigation bar is a table of submissions. The table has columns for Priority, Insured, Submission, Effective, Status, Premium, Next Action, and Assigned To. The table contains 14 rows of submission data. At the bottom of the table, there is a pagination control showing 'Back 1 Next' and 'Showing 1 to 14 of 14 Submissions'.

Priority	Insured	Submission	Effective	Status	Premium	Next Action	Assigned To
↓	Sally Smith	FB-47721	06/24/2019	Draft	\$0		
↓	Sally Smith, LLC	FB-47742	06/29/2019	Application Uploaded	\$0		
↓	John Smith, LLC	FB-47815	06/29/2019	Application Uploaded	\$0		
↓	Burwell Feeders, LLC	FB-48303	04/01/2019	Application Uploaded	\$0		Wesley Jones
↓	First Step, LLC	FB-48304	05/14/2019	Application Uploaded	\$0		Wesley Jones
↓	John Smith, LLC	FB-47708	06/28/2019	Submitted	\$0		Hillary Mayard
↓	Sally Smith, LLC	FB-47746	06/29/2019	Submitted	\$0		Randi Mathews
↓	John Smith, LLC	FB-47813	06/29/2019	Submitted	\$0		Randi Mathews
↓	John Smith, LLC	FB-47816	06/29/2019	Submitted	\$0		Valarie Portillo

CREATING NEW SUBMISSION

1. Manual Submission

- Select "New Submission" from home page
- In Submission Details window, complete all required fields
- Click "Create Application"
- When application opens, enter information in all required fields
- Click "Submit Application"

The screenshot shows the 'Submission Details' form. It has a title bar with a close button. The form contains the following fields and controls:

- Upload from an ACORD application
- Insured Name: John Doe
- Effective Date: 06/24/2019
- Expiration Date: 06/24/2020
- Needed By Date: (empty)
- Buttons: Cancel, Quick Quote, Create Application

2. Upload a Submission

- Select "New Submission" from home page
- In Submission Details window, check "Upload from an ACORD Application" box
- Select "Browse" button, locate ACORD, click "Open"
- When Submission Detail window reopens, click "Create Application"
- When application opens, complete information in any blank, required fields
- Click "Submit Application"

Submission Details ✕

Upload from an ACORD application

✓ Insured Name:

✓ Effective Date:

✓ Expiration Date:

Needed By Date:

3. Email a Submission

- a. Address email to EZStone@stonetrustinsurance.com and CC your Production Underwriter
- b. Attach ACORD, Loss Runs, EMOD worksheet and any other pertinent documents

ONCE A QUOTE IS RECEIVED

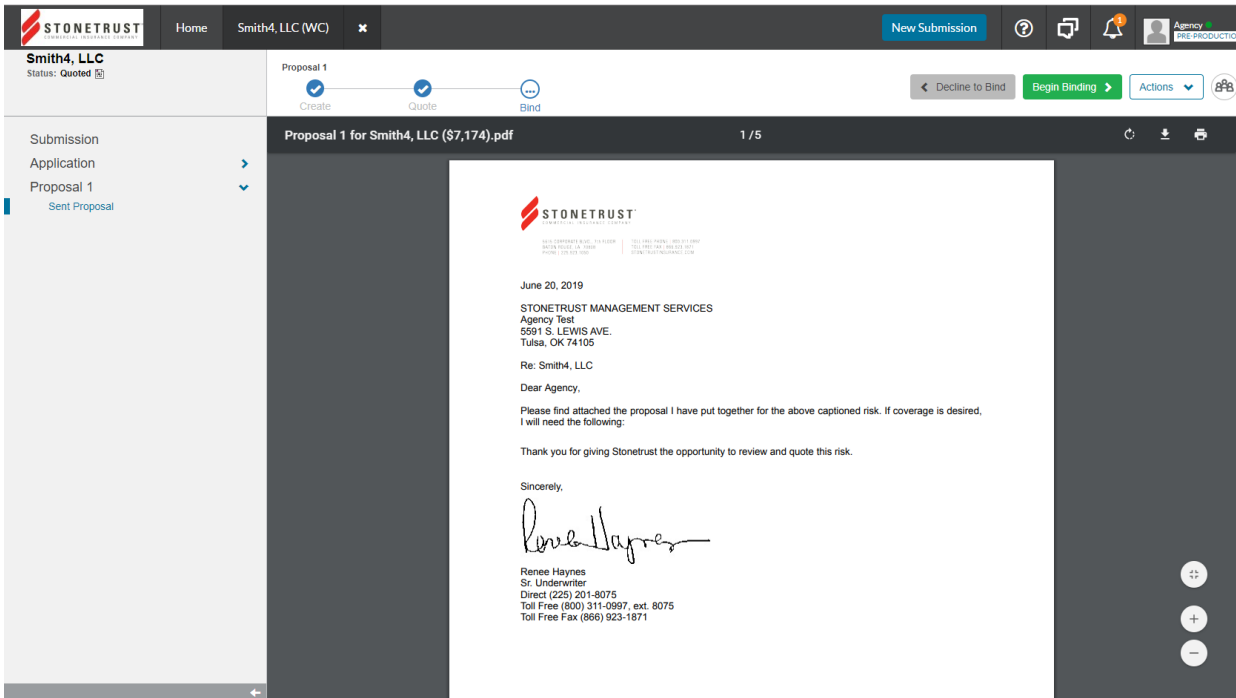
1. Modify a Submission

- a. Find and click on insured’s name from the list on the EZStone homepage
- b. Click on the word “Application” in the left-hand side of your screen
- c. Go to dropdown “Action” box in top, right-hand side of your screen
- d. Select “Modify Submission”
- e. Using the guide in the left, select the section of the submission to modify
- f. When finished, click “Submit Modifications” button in top, right-hand corner
- g. Confirm by Submitting Pending Changes

The screenshot shows the Stonetrust web application interface. At the top, there's a navigation bar with 'Home', 'Sally Smith3, LLC (WC)', and 'New Submission'. Below this, the submission status is 'Quoted'. The left sidebar has a menu with 'Submission', 'Application', 'General Information', 'WC: Locations - Class Codes', 'WC: ACORD Questions', 'WC: Individuals Included/Excluded and Agent', 'WC: Prior Carrier Information and Loss History', 'WC: Policy Information', and 'Proposal 1'. The main content area shows the 'General Information' section with fields for 'DBA Name', 'Insured Mailing Address' (Street 1: 5615 Corporate Blvd., Street 2, Zip Code: 70806, City: Baton Rouge, State: LA, Primary Phone: 2258888888), 'Insured Information' (Yrs in Bus: 15, SIC Code, NAICS Code, Legal Entity: Corporation, FEIN, Tax Identifier: 487898978), and 'Nature of Business / Description of Operations: Doctor's office'. There's also an 'Additional Interest Information' table at the bottom.

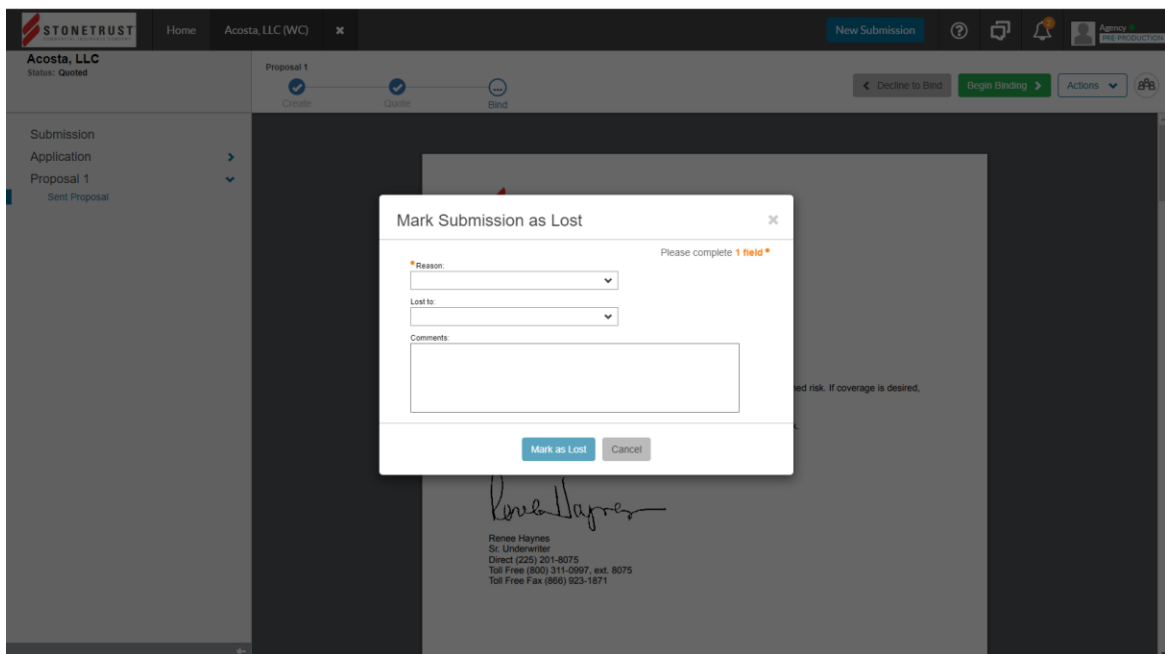
2. Request to Bind a Submission

- Find and click on insured's name from the list on the EZStone homepage
- Click on the word "Proposal" in the left-hand side of your screen
- Select "Begin Binding" button in top, right-hand corner of your screen



3. Decline to Bind a Submission

- Find and click on insured's name from the list on the EZStone homepage
- Click on the word "Proposal" in the left-hand side of your screen
- Go to dropdown "Action" box in top, right-hand side of your screen
- Select "Close Submission"
- Complete information in Mark Submission as Lost window



ADDITIONAL CORRESPONDENCE

1. Chat, Task, Note & File Attachment

- Find and click on insured's name from the list on the EZStone homepage
- Select button in top, right-hand side of screen that looks like people
- Click on "New" button and select the correspondence of your choice
- Follow directions within the correspondence you select



QUICK QUOTE

- Select "New Submission" from home page
- In Submission Details window, complete all required fields
- Click "Quick Quote"

Submission Details

Upload from an ACORD application

✓ Insured Name: John Doe

✓ Effective Date: 06/24/2019

✓ Expiration Date: 06/24/2020

Needed By Date:

< Cancel Quick Quote > Create Application >

- When application opens, enter information in all required fields
- To create a manual submission from here, click "Next"

Submission Details

Quick Quote Information

State Code: Val.	Rate	Remuneration	Manual Premium
LA	8810-01	0.22	\$154,895
			\$341

✓ EMod: 1.0

✓ Is application state AR, LA, MO, MS, OK, TN, TX or NE? Yes No

✓ Is this account currently in Bankruptcy proceedings? Yes No

✓ Is applicant a Staffing Agency? Yes No

Check Clearance

✓ FEIN SSN

✓ Tax Identifier: 265897840

PLEASE NOTE:

Quick Quote will provide you with an indication of MANUAL premium only.

Also, the indicated premium does not include applicable minimum premiums.

< Back < Cancel Next >