

Hanover Marine

# TAP Sales— Marine user guide





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## Helpful tips for new users

#### **General information**

- Existing accounts should be located when creating a new quote for an existing customer. It's best that all business for a customer is under one account.
- You may copy quotes for multiple quote versions. The ability to enter a quote name makes versions easily identifiable.
- A red asterisk indicates a required field. You must complete all required fields to continue.
- Click gray circle icons with a question mark beside a field to obtain additional information.
- Contact the help desk for any questions regarding the TAP Sales—marine system. The help desk phone number is located at the bottom of each screen in the system.

#### Underwriter information and referrals

- Online referral for additional pricing considerations or changes in terms and conditions is available from the **Premium Summary** screen.
- When you refer a risk to the underwriter, your quote information will automatically be sent to your marine underwriter, and you will receive a prompt response.
- If you have a question, please contact your marine underwriter.

## Builder's risk

#### **Eligibility guidelines**

- New construction, lateral additions and non-structural renovations. No coverage for existing structures or vertical additions.
- Commercial and residential projects
- Policy terms from 6–24 months
- Coverage provided for multiple buildings at the same job site, provided they are the same construction type.
- Addresses outside of the U.S. are not eligible.
- Job sites located in AK, FL, HI and KY are not eligible for online quote.

- Flood and earth movement coverage available up to \$5M maximum limits. Job sites located in the states of CA, OR and WA have a maximum earth movement coverage limit of \$1M.
- Maximum limits (includes soft costs and rents subject to a maximum of 25% of construction costs):
  - \$1M frame
  - \$2.5M joisted masonry
  - \$5M non-combustible
  - \$10M masonry non-combustible
  - \$10M modified fire resistive or fire resistive
- Subject to a \$500 minimum premium
- Premium is prorated and is fully earned for policies with terms of one year or less. For policies with terms of 12–24 months, premium is prorated, and annual premium is fully earned.

#### **Program highlights**

- Quickly quote, rate, issue and print the policy online
- 20% commission
- Multiple billing options available
- Broad named insured—includes the interest of all contractors, sub-contractors and owners
- Equipment breakdown included
- Permission to occupy included
- Replacement cost with no co-insurance
- Insufficiency of limit clause—provides up to 10% of the limit of insurance (up to \$1M) following a total loss to covered property

## Contractor's equipment

#### **Eligibility guidelines**

- Addresses outside of the U.S. are not eligible.
- Locations in CA, HI and KY are not eligible for online quote.
- Maximum limit of \$5M for total equipment schedule
- Maximum limit of \$1M for any one item

- Equipment used for logging, mining, demolition/ blasting, recycle/salvage/scrap metal/waste management/landfill is not eligible.
- Asphalt plants, oil and gas drilling or well servicing operations are not eligible for online quoting.
   Please contact your marine underwriter.
- Subject to a \$500 minimum earned premium

#### **Program highlights**

- Quickly quote, rate, issue and print the policy online
- Equipment leased or rented from others
- Equipment leased or rented to others
- Annual adjustment form, reducing the need for endorsements
- Capability to upload equipment schedules, eliminating the need for excessive data entry
- 20% commission
- Hauling property of others as a carrier for hire
- Installation or rigging property coverage
- Waterborne property
- Multiple billing options available
- Blanket loss payee available

#### Billing and payment options

- Direct bill is the default billing option for all policies. Agency bill is also an option.
- For installment plans, a bill due day (the day of the month on which the insured's installments are due) may be selected.
- Payment plans, installment fees and late fees vary by state. Billing documents by state are located on our billing resource site—hanover.com/billing
- Electronic funds transfer (EFT) is available for all payment plans. There are no installment fees for EFT-billed policies.
- Pay-by-phone options are credit card, debit card or check.
- Pay-by-web options are credit card, debit card, checking account or savings account.
- The maximum allowable transaction is \$50K.

#### **Issuing policies**

- If no referral is required, once you complete the billing information screen, you are ready to issue.
- Clicking the **Issue** button will submit your policy for issuance.
- If the **Issue** button is disabled, the quote may be incomplete, or a referral may be required.
- If a referral message is indicated, you will have a **Refer to UW** button on the **Premium Summary** screen.
- When you issue a policy in this system, the policy must be delivered to the policyholder. No additional copies of this policy will be sent to your agency or to the insured.
- The policy will be available in the system after the policy is issued to view or print.

## Access TAP Sales—marine

TAP Sales—marine is available on the TAP website, using Chrome or Internet Explorer (version 9 or higher) as your browser. Enter the URL for TAP—<u>https://tap.hanover.com</u>—in your browser address bar. Log in using your TAP user ID and password.

	Welcome, ABC Agency Logout Feedback	Contact Us Sitemap Tech Support
Hanover Insurance Group		Search Hanover
↑ Quote & Issue Service Customers Sale	es & Marketing Document Library - Training & Suppo	ort - Agency & Claims Tools -
Quote, Issue & Endorse	Service Customers	Updates & Alerts
Personal Lines Small Commercial Lines	<ul> <li>Policy Number</li> <li>Insured/Last Name</li> <li>Claim Number</li> </ul>	> Supported Internet Explorer Browsers for Hanover POS
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	Claims and Losses History Customer Number Policy Number	8336 Work Items Product v Santa v Transaction v Sont by More Options v Myr Filters v III II Sont By: Effective Date
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- 1) Click **Marine** in the **Quote, Issue & Endorse** section from the TAP home page.
- On the left side of the home page are helpful links, including access to service customers and billing resources.
- (3) The top navigation includes a Home button, which will bring you back to the home page; an Agency Activity button, which provides access to recent transactions; an Accounts button, which provides access to work for a specific account, a My Work button, which gives you access to all the work for your agency, and a button with your Agency Name, which provides a sign out feature.
- 4 Your existing work items will show under **My Work Items**.

## Search existing accounts

Existing accounts should be located when creating a new quote for an existing customer. It's best that all business for a customer is under one account. Also, access an existing account when you receive the order from an insured to issue a policy.

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			Private Company - New Busines	15							Edit Other Actions
											Сору
											Help Desk: \$ 800-626-6601 Option 4
						C2018 Hanover	Insurance Group - All rights reserv	ed.			

- 1) To navigate to the **Accounts** screen, select **Accounts** from the top navigation bar.
- (2) If you do not see your account listed, search by either account name or customer number. Enter at least three characters to perform a search.
- 3 Select your account from the search results by clicking it once and clicking **Open**.
- Once you select your account, all work items for the account will be listed on the Account Information screen.
- (5) 5a) To create a new quote for the account, click Get Started With, then select Inland Marine— New Business

**5b)** To access an existing quote, click on the quote row and select from the action buttons available to work on an existing quote. When you access a quote, you will automatically be navigated to the screen from where you left off.

### Create a new account

First, search for an existing account, then create a new account if the customer does not exist in the system.

Select Product Below to Create a New Subm	nission
ALLED FACILITIES	LPL MPL Non-Profit Private Company
	Account Search
	Search for an existing account by using either the Customer Number or the Company Name
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	Customer Number Une 10 digit
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Denotes Required Fields     Account Information	3 Search Cancel Create New Account 4
Customer Number	No search results found. Peese use the "Create New Account" button below to get started with a new account.
Company Name * ABC	Company Name CutomerNumber Address City State Zp
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	os (ID:0000 - ABC Company) Status: In-Progress   Account #000000000 @ History   ain Stree
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	General Information
Zip Code * 01653	Premium Summary
City* Worce	
5 State MA	Billing Information > Builder's Risk • 0
Continue Cancel	Documents Continue
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- 1 Roll your mouse over the **Marine** tile on the TAP Sales home page and click **Get Started**.
- 2) Enter the information to search by customer number or company name on the Account Search screen.
- 3 Click Search.
- (4) Click **Create New Account** if there are no search results. Note: select the account and click **Open** if the account appears in the search results.
- 5 Complete the account information and address and click **Continue**.
- 6 Click the drop-down arrow beside your product—either Builder's Risk or Contractor's Equipment to view the eligibility and program highlights.
- Click Continue once you have reviewed the eligibility and program highlights for your product and determined the risk is eligible to be processed online.

## Generate a quote for builder's risk

Enter the information to provide your customer with a quote for builder's risk. Builder's risk includes coverage for residential and commercial structures and buildings being renovated, developed and newly built, the materials and equipment used in the project and labor and expense costs.

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Policy Confirmation & Issue		Quote Name ABC Quote 123	](2)
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		Named Insured * ABC Company	
		Named Insured (continued)	
		DBA	
		If Insured is not Contractor, enter Contractor Name	
		Insured Address	
		Street Address • 123 Main Street	
		Street Address (continued)	
		Zip Code * 01653	
		Chy* WORCESTER	
		State MA	
		Policy Information	
		Effective Date * 11-26-2018	
		Expiration Date • 11-26-2019	
		Hes Contractor been In business for less than 3 years? • Yes No	$\frown$
		Has Applicant declared bankruptcy in the last 5 years? • Yes No	(3)
		Pres Applicant declared banwupcy in tite test & years:	<u> </u>
		During the past three (3) years, have there been more than 2 Builders Risk losses or any 1 loss * Yes No	
		Hes construction begun? • Yes No	
		Agency Information	
		Agency Code * 1234557 \$	
		Agency Name ABC COMPANY	
		Agency Name (cont.)	
		Address Line 1 123 MAIN STREET	
		City WORCESTER	
		State MA	
		Zip Code 01605	
		Agency Contact Name * ABC Company	$\sim$
		Phone *	(4)
		Email Address · abc@abccompany.	com
		5	
		Continue More Actions ¢	

- 1) Select **Builder's Risk** under coverage on the **General Information** screen.
- Enter the quote name to differentiate between multiple quotes for an insured.
- Complete the policy information. The project period may be 6–24 months.
- (4) The agency contact information will show on your quote letter, so your prospective insured will know exactly whom to contact. This is also valuable information for the marine underwriter, particularly in the case of an underwriter referral.
- 5 Click **Continue** once the information is complete.

## Generate a quote for builder's risk continued

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Policy Confirmation & Issuence Documents	>	More Address
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- 6 Complete the job site detail. Multiple buildings of the same construction type may be included in one limit for one job site. Click **Add** when all required fields are complete. The job site appears at the top of the screen in roster format, with buttons to **Edit** or **Delete** the job site. Click **Continue** once the information is complete.
- View the premium information for the defaulted deductible and policy package type on the Premium Summary screen and modify if necessary. Click the Help Feature icon beside the Policy Package field to see available coverage package highlights. Amending the deductible or changing your package instantly re-rates your quote.
- 8) When you click **Generate Quote Letter**, the quote letter opens in a separate window.
- Once generated, the quote letter will be available via the **Documents** tab on the left navigation bar, even after the policy is issued. Click the **View** button to open the quote letter.
- Note: If you need additional pricing considerations or changes in terms and conditions, click the Click here link to refer to underwriting.

## Generate a quote for contractor's equipment

Enter the information to provide your customer with a quote for contractor's equipment. Coverage for contractor's equipment includes tools and equipment that may be owned, rented, leased or borrowed by building, general and road and sewer contractors.

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Premium Summary	>	Coverage* Contractor's Equipment :
Additional Interest	>	Account Number
Billing Information	>	Quote Name CE for ABC
Policy Confirmation & Issue		
Documents	>	Named Insured
		Named Insured * ABC Company
		Named Insured (continued)
		DBA
		If insured is not Contractor, enter Contractor Name
		Insured Address
		Street Address * 123 Main Street
		Street Address (continued)
		Zip Code • 01653
		City • WORCESTER
		State MA
		Policy Information
		Effective Date* 11/26-2018
		Expiration Date 11-26-2019
		Is any one item worth more than \$1,000,0007 * No
		is any of the equipment used for logging, mixing, demoliform/basting, recycle/salvege/scrap metal, wass, * Yes No
		a siny of the equipment date for organity mining, demonstrationing, recommendations and the equipment of the equipment date of the organity method water of the equipment date of the organity method water of the equipment date of the organity method water of the equipment date of the organity method water
		Number of losses in the prior 3 years * 0
		Total amount of losses in last 3 years * \$0
		Has any one loss resulted in a claim larger than \$25,000? • Yes O
		Is the Insured's address in Hawaii or Kentucky? * Yes o
		Has there been a bankruptcy in the prior 3 years? • Yes No
		Has the risk been in business less than 3 years? • Yes No
		0 0
		Agency Information
		Agency Code • 1234567 €
		Agency Name ABC COMPANY
		Agency Name (cont.) Address Line 1 123 MAIN STREET
		Address Line 1 123 MAIN STREET City WORCESTER
		State MA
		Zip Code 01605
		Agency Contact Name      ABC Company
		Phone 3
		Email Address • abc@abccompany.com
		(4)
		Continue More Actions \$
		COLORDON INTER PROVIDE Y

- (1) Select **Contractor's Equipment** under **Coverage** on the **General Information** screen.
- 2 Enter the quote name to differentiate between multiple quotes for an insured.
- (3) The agency contact information will show on your quote letter, so your prospective insured will know exactly whom to contact. This is also valuable information for the marine underwriter, particularly in the case of an underwriter referral.
- 4) Click **Continue** once the information is complete.

General information	O A policy or submission for inland Marine already exists for	or this account. The underwriter must review to confirm we are not already entertaining this specific line of bu	sines.		
Contractor's Equipment Coverage					
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## Generate a quote for contractor's equipment continued

- 5 Enter specific coverage information on the **Contractor's Equipment Coverage** screen. Click **Continue** once the information is complete.
- (6) View the premium information for the defaulted deductible and policy package type on the Premium Summary screen and modify if necessary. Click the Help Feature icon beside the Policy Package field to see available coverage package highlights. Amending the deductible or changing your package instantly re-rates your quote.
- 🥑 When you click **Generate Quote Letter**, the quote letter opens in a separate window.
- Once generated, the quote letter will be available via the Documents tab on the left navigation bar, even after the policy is issued. Click the View button to open the quote letter.
- Note: If you need additional pricing considerations or changes in terms and conditions, click the Click here link to refer to underwriting.

## Upload a file (contractor's equipment only)

On the right side of the **Premium Summary** screen, documents, including loss runs and equipment schedule for contractor's equipment coverage, are to be uploaded for policy issuance. You can get a quote and access the quote letter without uploading documents, unless specific documentation is required for a referral. Quotes are subject to the schedules being uploaded. If the insured has rejected terrorism coverage, the signed rejection form must be uploaded for policy issuance.

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- Click and drag the document from your system into the Drag file here box in the Upload a File section. Note: alternatively, click Add File in the Upload a File section, locate your file in the resulting Browse window, and double-click it to add to the documents area.
- 2) Select a **Document Type** using the drop-down menu once the file name appears in the documents area.
- 3 Click Upload.
- 4) The document name will appear in the attachments area under the **Documents** title.

## Policy confirmation and issuance

Once you have generated the quote letter and uploaded the necessary documents, click **Continue** from the **Premium Summary** screen to continue to issue the policy. Otherwise, once the insured gives you the order to issue the policy, follow the instructions to access TAP Sales—marine and search existing accounts.

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C2018 Hanvore Insurance Courge - All rights reserved.		Help Desk: S 800-626-6601 Option 4	

- (1) Click **Continue** from the **Premium Summary** screen and complete the additional information needed for policy issuance.
- If there are no additional interests, click Continue. If there are additional interests click Add New to add additional interests. Complete the information for the additional interest detail and click Add. Additional interests will appear at the top of the screen in roster format. Click Continue when all additional interests are added.
- (3) The billing type will default to direct bill. If you choose EFT (Electronic Funds Transfer) as the payment method, fields will appear to enter the banking information for the insured. Enter the billing name and address if it is not the same as the insured. Click **Continue** when billing information is complete.

eneral Information	PLEASE REVIEW AND CONFIRM IMPORTANT POLICY DETAILS BEFORE PROCEEDING TO ISSUE
ib Ste Detail	PLEASE REVIEW AND CONFIRM IMPORTANT POLICY DETAILS BEFORE PROCEEDING TO ISSUE
emium Summary	
dditional Interest	Policy Confirmation & Issuance
ling information	
licy Confirmation & Issuance	> Insured Information
cumenta	
	Insured Name ABC COMPILY
	Address 123 MAIN STREET
	WORCESTER MA 0/663
	Billing Information
	Billing Type Direct Bill
	Paymant Plan Monthly
	Billing Address Same as insured address
	Policy Information
	Policy Period 11:26:2019
	Agency Code 000000
	Job Ste Location Address 456 MAIN STREET
	WORCESTER MA 0/653
	Job Star Description A 3 STORY FRAME BULDINGS) UNDER CONSTRUCTION AT 456 MAIN STREET WORCESTER, MA, 01653 TO BE OCCUPED AS A COMMERCIAL STRUCTURE.
	Hard Cost Umit \$1,000
	Deductible \$2,500
	Total Policy Premium \$505.00
	Commission 20%

Policy confirmation and issuance *continued* 

		This second is used	only and cannot be updated.				
General Information	>	This screen is read	only and cannot be updated.				
Job Site Detail	>						
Premium Summary	>	Documer					
	>	LAN ID	Transaction	Effective Date	Package Created	Peckege	
	>	PP1057	New Business	11-26-2018	11-26-2018 13:32:09	QPP/Quote Proposal Package	View
Policy Confirmation & Issuence	~ <sup>,</sup>	PP1057	New Business	11-26-2018	11-26-2018 13:45:02	Declarations Package	View
Documents	$(6) \rightarrow$						

- Please review and confirm important policy details before proceeding to issue. Remember, to issue a contractor's equipment policy, you must upload all required documents.
- 5 Click **Issue** once the information has been reviewed and verified. A verification message will appear on screen: Congratulations. Your policy has been issued. The Policy Declaration on the Documents tab will generate the completed policy, which must be delivered to the policyholder. No additional copies of this policy will be sent to your agency. Thank you for placing your business with The Hanover.
- Once the policy is issued, the declarations package will be available via the **Documents** tab. Click the **View** button to open the declarations. You will have options to print and save the policy. When you issue a policy in this system, the policy must be delivered to the policyholder. No additional copies of this policy will be sent to your agency or to the insured. The policy will be available in the system after the policy is issued to view or print.

#### Why The Hanover?

The Hanover is a leading property and casualty insurance company offering a broad portfolio of tailored coverage solutions for personal, commercial and specialty customers. The Hanover is a Fortune 1000<sup>®</sup> company, with nationally-recognized claims service and proactive risk management expertise. The company's financial strength has earned it high marks from key industry analysts, including an "A" rating (Excellent) by A.M. Best Company.



**The Hanover Insurance Company** 440 Lincoln Street, Worcester, MA 01653 h a n o v e r . c o m The Agency Place (TAP)—https://tap.hanover.com

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