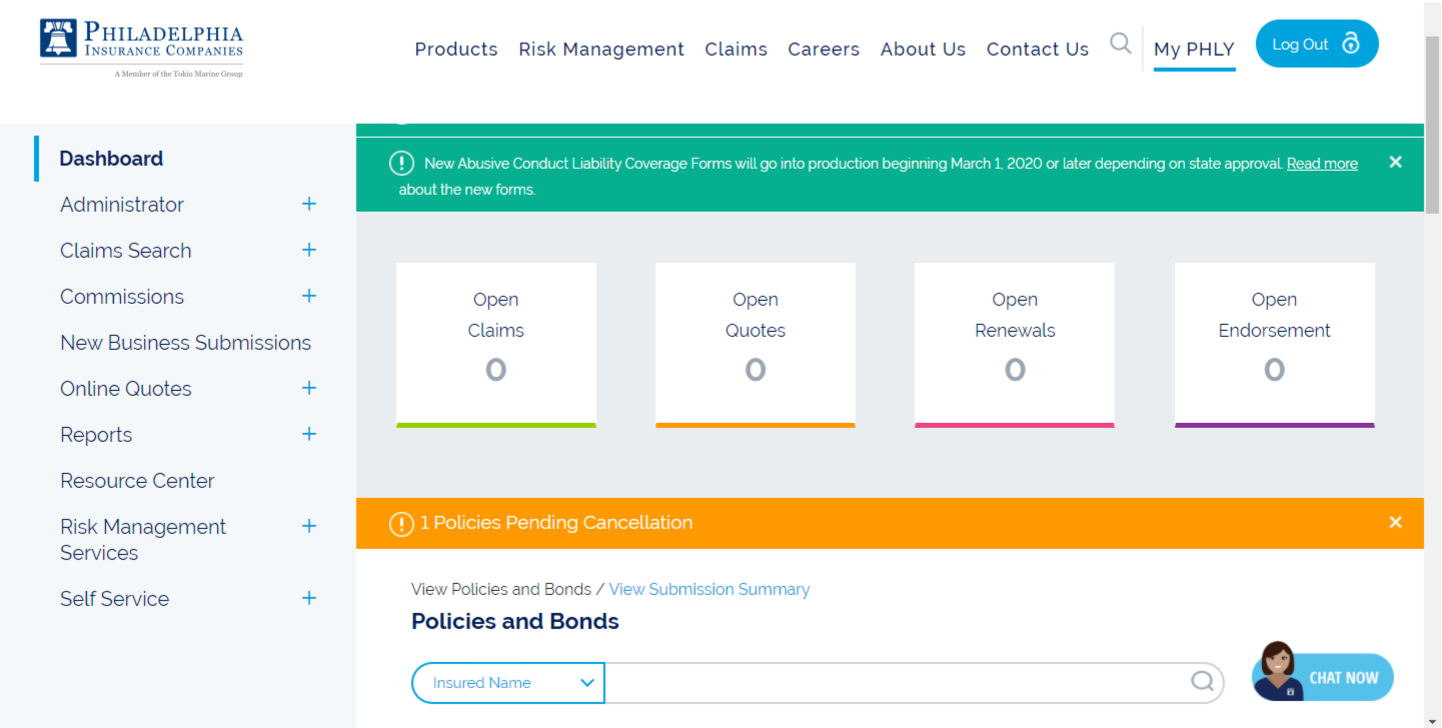
New Business Submission

Log in to My PHLY - From the Dashboard click **New Business Submissions** from the left menu

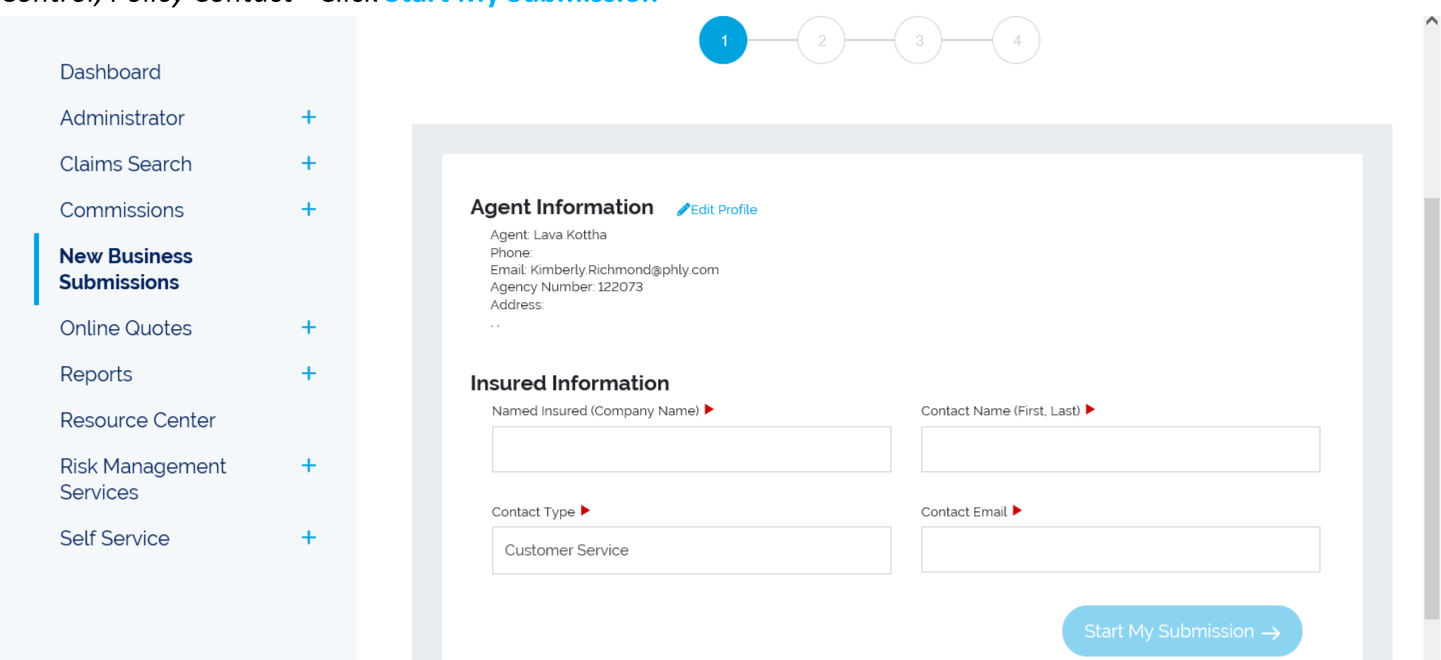


The submission process is just four short steps!

Step 1:

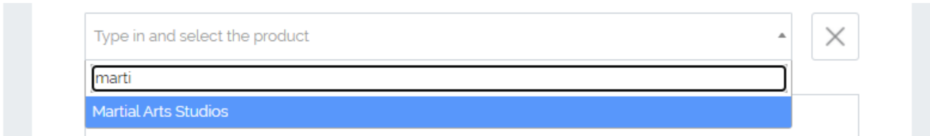
Review the **Agent Information** for the logged in agent and make changes if needed using **Edit Profile**.

Enter the **Insured Information** - Using the drop down select the **Contact Type** – *Customer Service, Endorsement, Loss Control, Policy Contact* - Click **Start My Submission**

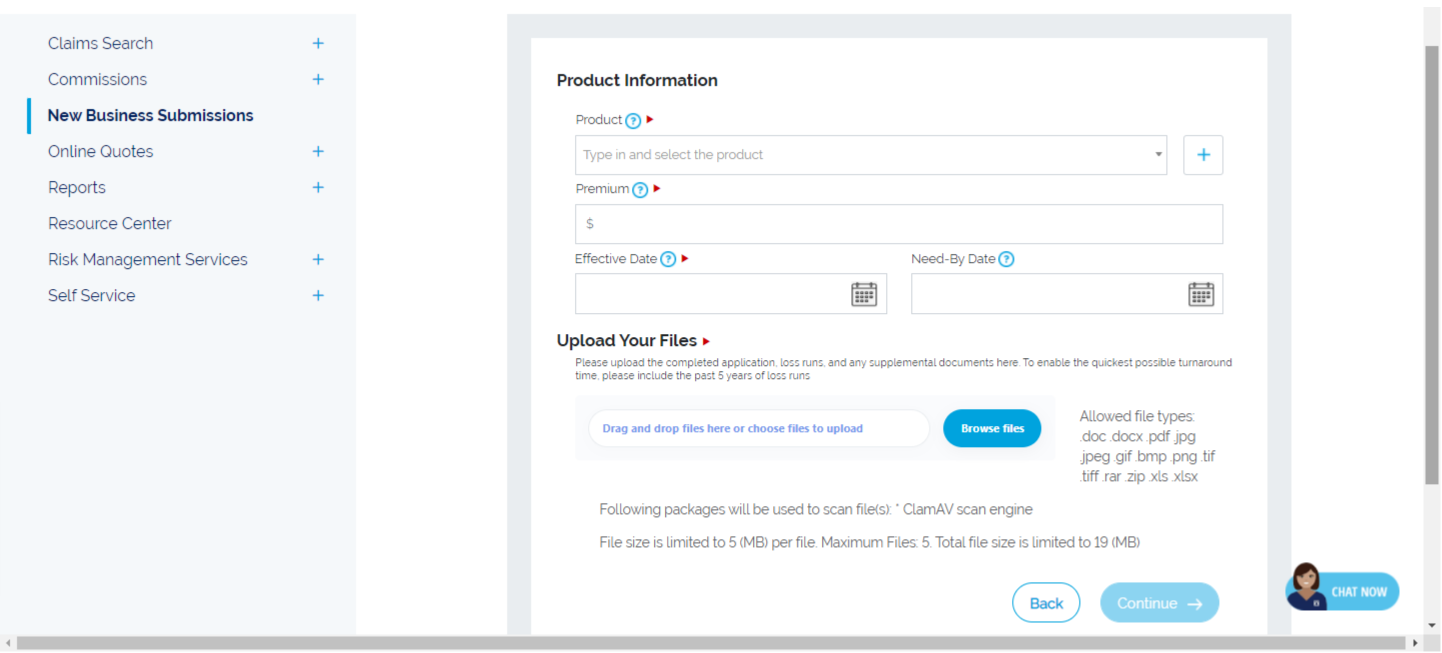


Step 2:

Select the policy **Product** using the drop down. If submitting for more than one product, use the **blue +** sign to activate another drop down. A total of four products may be included in one submission. **TIP**: To quickly locate a product, click the drop down arrow and begin typing. The relevant choices will pull to the top.



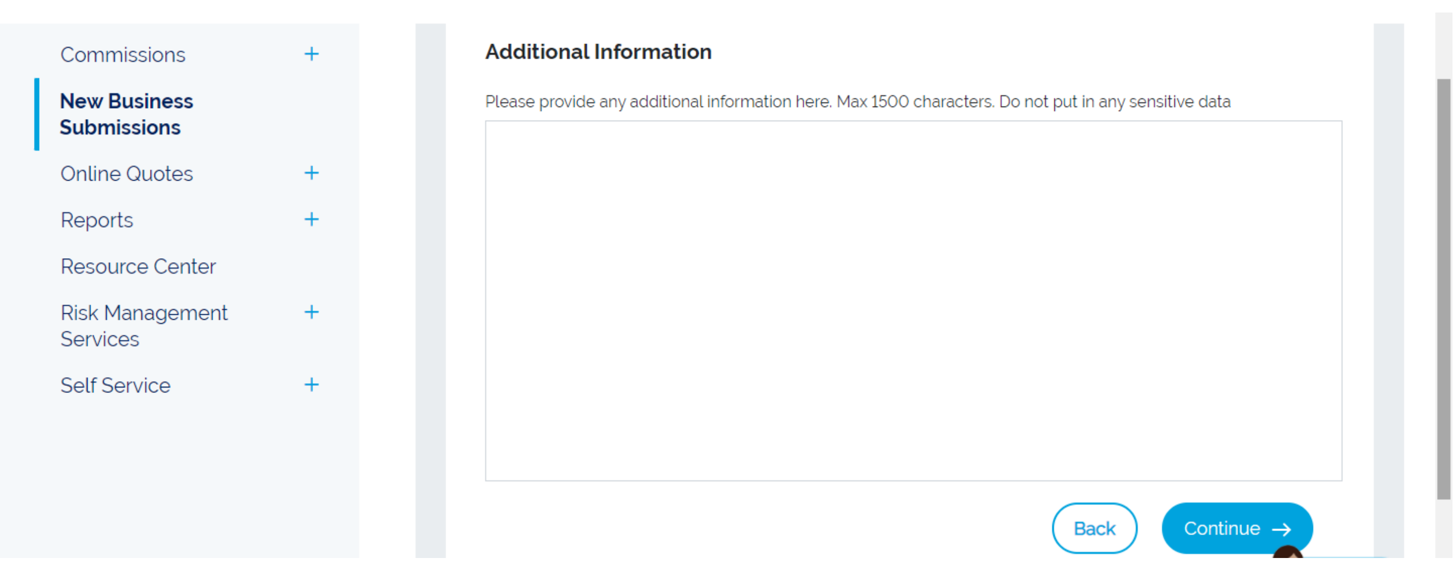
Enter the policy **Premium.** If no expiring premium, enter a premium estimate, enter requested **Effective Date**, and **Need by Date**. Drag and drop files or use the **Browse Files** button to upload documents. If at any point in the submission process a prior page needs to be revisited, select **Back**. When ready click **Continue**.



Step 3:

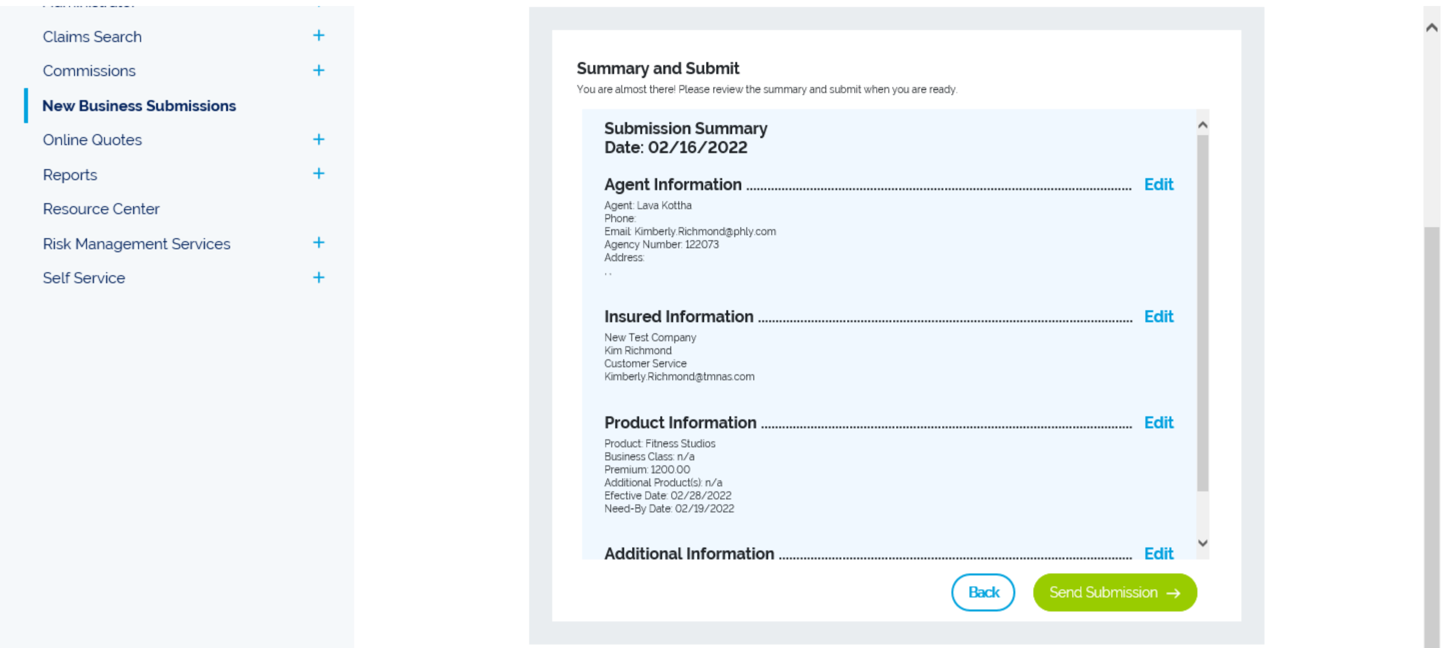
Enter any additional information and click **Continue.**

Note - This page is not required. If there is no additional information needed for the submission, click **Continue.**

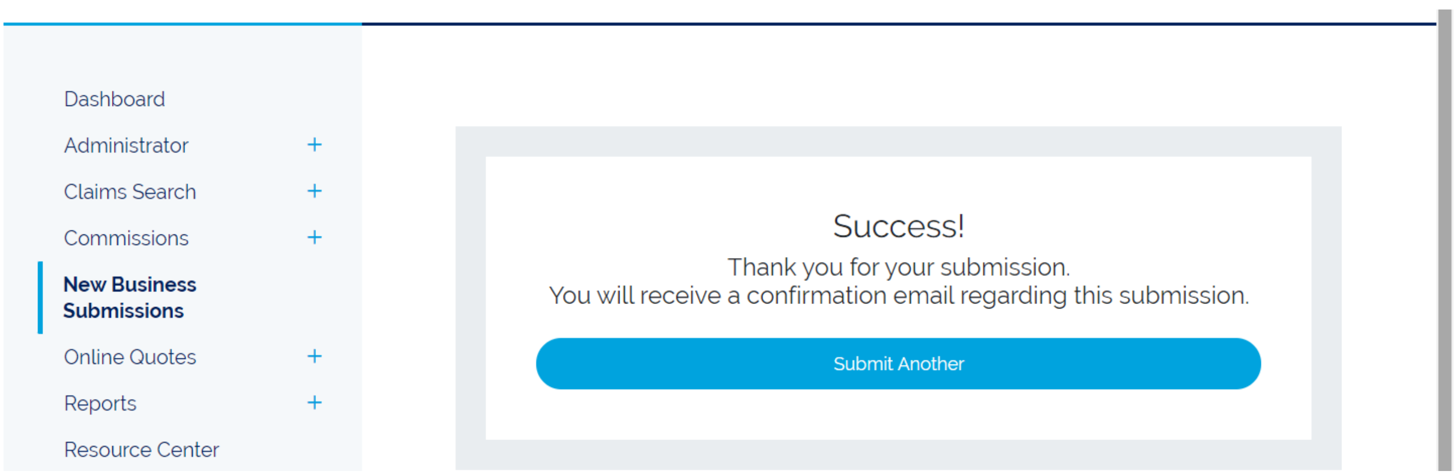


Step 4:

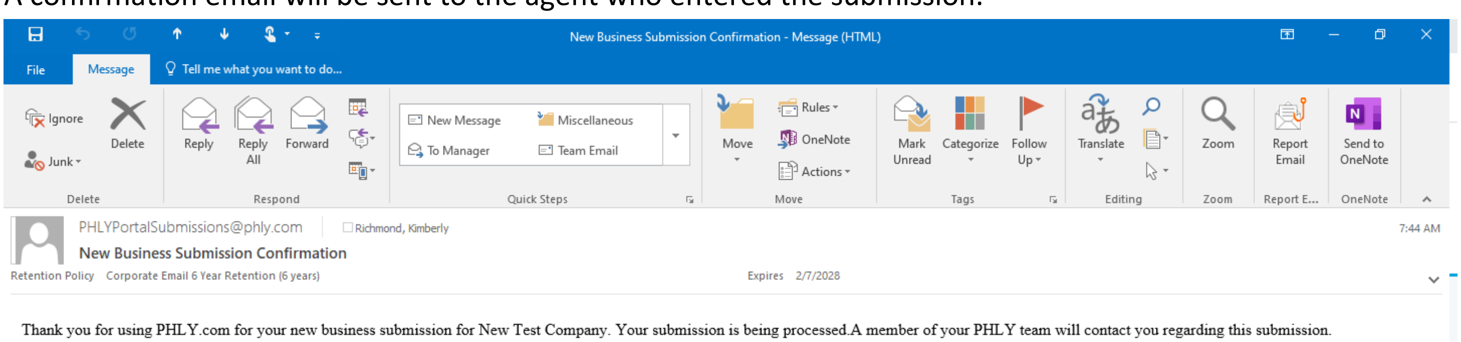
On the **Summary** page, review the submission. If information needs correcting, use the various **Edit** buttons. When the submission is ready click **Send Submission.**



A **Success** message displays.



A confirmation email will be sent to the agent who entered the submission.



When the submission is logged by PHLY, track the progress using the **View Submission Summary** page on the Dashboard.