

New Business Submission

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



Products Risk Management Claims Careers About Us Contact Us

My PHL

Log Out

The dashboard features a left-hand navigation menu with items: Dashboard, Administrator, Claims Search, Commissions, New Business Submissions, Online Quotes, Reports, Resource Center, Risk Management Services, and Self Service. The main content area includes a green notification banner about new Abusive Conduct Liability Coverage Forms, four cards for Open Claims, Open Quotes, Open Renewals, and Open Endorsement (all showing 0), an orange notification banner for 1 Policy Pending Cancellation, and a 'Policies and Bonds' section with a search bar and a 'CHAT NOW' button.

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**

The form is titled 'Agent Information' and 'Insured Information'. The 'Agent Information' section shows details for Agent Lava Kottha, including phone, email (Kimberly.Richmond@phly.com), and agency number (122073). The 'Insured Information' section contains four input fields: 'Named Insured (Company Name)', 'Contact Name (First, Last)', 'Contact Type' (with 'Customer Service' selected), and 'Contact Email'. A 'Start My Submission' button is located at the bottom right. A progress indicator at the top shows four steps, with the first step highlighted.

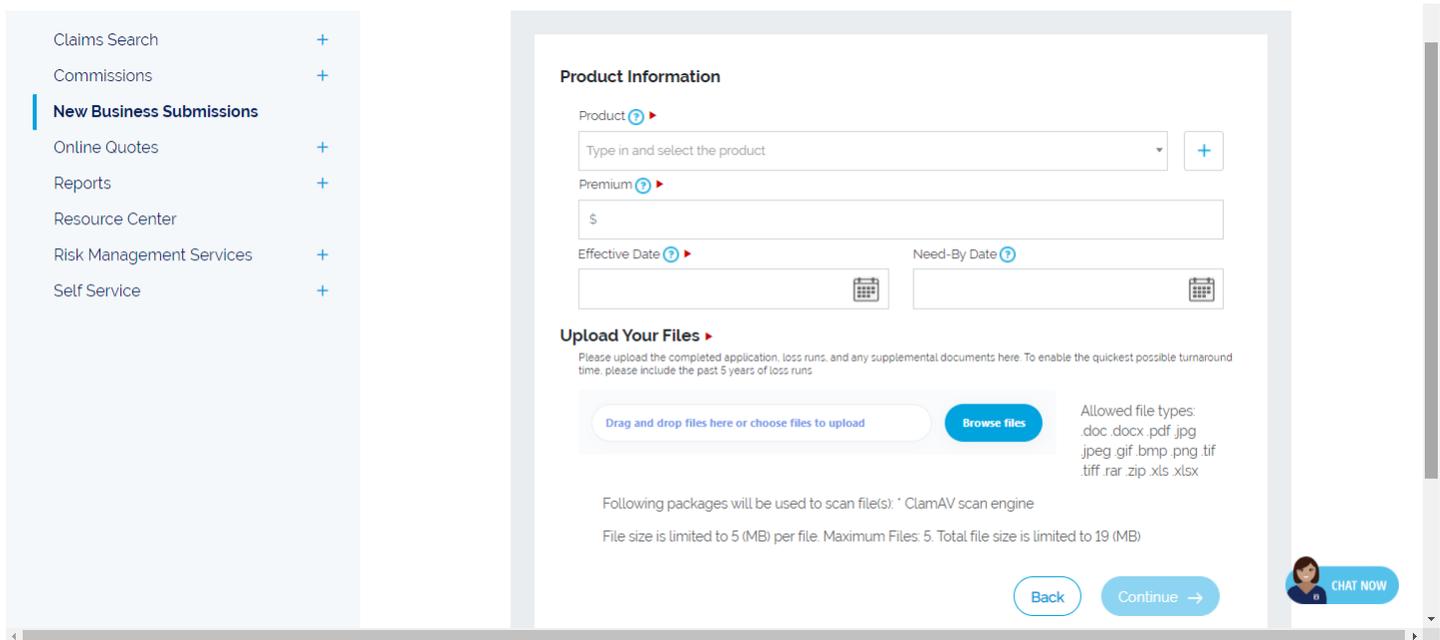
Step 2:

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.



A screenshot of a web form showing a dropdown menu for product selection. The input field contains the text "Type in and select the product" and a search icon. Below the input field, a list of suggestions is displayed, with "Martial Arts Studios" highlighted in blue. A close button (X) is visible to the right of the dropdown.

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**.

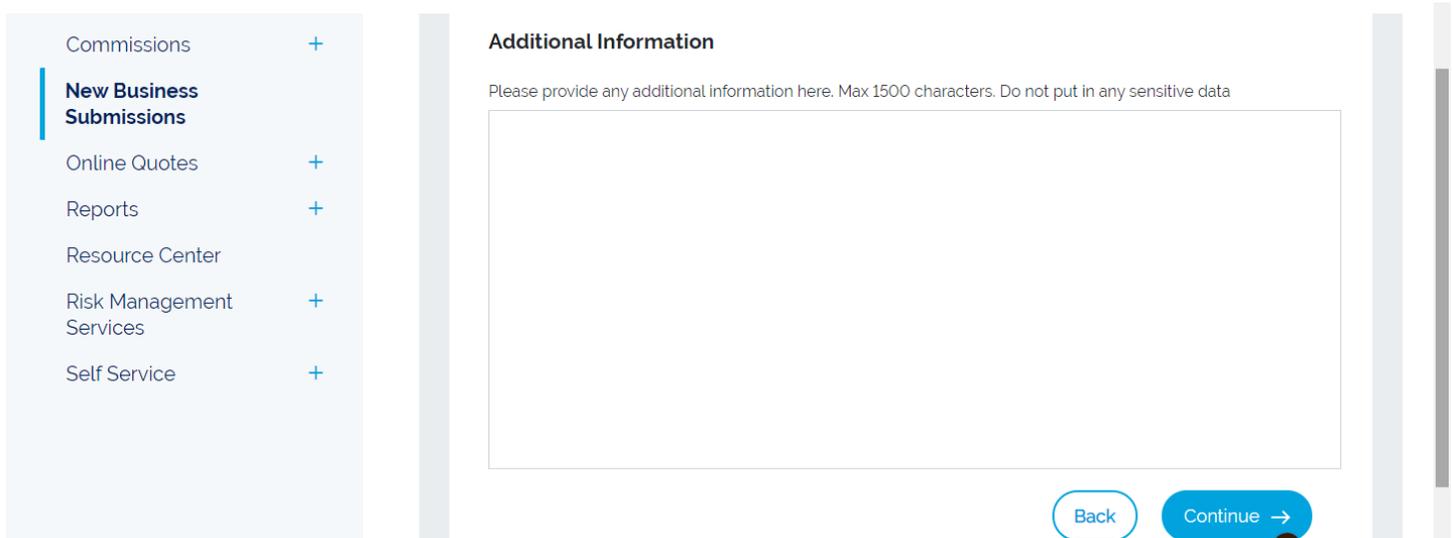


A screenshot of the "Product Information" form. The form includes a dropdown for "Product" with a search icon and a "+" button. Below it is a "Premium" field with a "\$" symbol. There are two date fields: "Effective Date" and "Need-By Date", each with a calendar icon. The "Upload Your Files" section contains a "Browse files" button and a list of allowed file types: .doc, .docx, .pdf, .jpg, .jpeg, .gif, .bmp, .png, .tif, .tiff, .rar, .zip, .xls, .xlsx. A "Back" button and a "Continue" button are at the bottom. A "CHAT NOW" button is also visible in the bottom right corner.

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**.



A screenshot of the "Additional Information" form. The form includes a text area for providing additional information, with a note: "Please provide any additional information here. Max 1500 characters. Do not put in any sensitive data". At the bottom, there are "Back" and "Continue" buttons. A "CHAT NOW" button is also visible in the bottom right corner.

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**.

The screenshot shows a sidebar on the left with navigation options: Claims Search, Commissions, **New Business Submissions** (highlighted), Online Quotes, Reports, Resource Center, Risk Management Services, and Self Service. The main content area is titled "Summary and Submit" and contains a "Submission Summary" for the date 02/16/2022. It lists three sections, each with an "Edit" button: "Agent Information" (Agent: Lava Kottha, Phone, Email: Kimberly.Richmond@phly.com, Agency Number: 122073, Address: ..), "Insured Information" (New Test Company, Kim Richmond, Customer Service, Kimberly.Richmond@tmnas.com), and "Product Information" (Product: Fitness Studios, Business Class: n/a, Premium: 1200.00, Additional Product(s): n/a, Effective Date: 02/28/2022, Need-By Date: 02/19/2022). At the bottom, there are "Back" and "Send Submission" buttons.

A **Success** message displays.

The screenshot shows a sidebar on the left with navigation options: Dashboard, Administrator, Claims Search, Commissions, **New Business Submissions** (highlighted), Online Quotes, Reports, and Resource Center. The main content area displays a "Success!" message: "Thank you for your submission. You will receive a confirmation email regarding this submission." Below the message is a blue button labeled "Submit Another".

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

The screenshot shows a Microsoft Outlook window titled "New Business Submission Confirmation - Message (HTML)". The email is from "PHLYPortalSubmissions@phly.com" to "Richmond, Kimberly". The subject is "New Business Submission Confirmation". The body of the email reads: "Thank you for using PHL Y.com for your new business submission for New Test Company. Your submission is being processed. A member of your PHL Y team will contact you regarding this submission." The email interface includes a ribbon with various actions like Ignore, Delete, Reply, Forward, Move, OneNote, Mark Unread, Categorize, Follow Up, Translate, Zoom, Report E..., and Send to OneNote. The bottom of the window shows the sender's name, subject, and expiration date of 2/7/2028.

When the submission is logged by PHLY, track the progress using the [View Submission Summary](#) page on the Dashboard.



- reports
- Resource Center
- Risk Management Services
- Self Service

1 Policies Pending Cancellation

[View Policies and Bonds](#) / [View Submission Summary](#)

Submission Summary

Insured Name

Submission Type: All New Business Renewal

From: To:

Search

