



Slate Quick Reference How to Add Senior or Military Discount

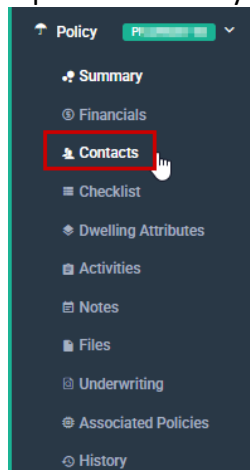
Locating the Military and Senior discounts looks a little different in Slate. Let's go through how you'll find and request both discounts below, for existing policies or new quotes.

First, let's start with two terms in Slate: a **Policy Contact** and the **Contact Card**.

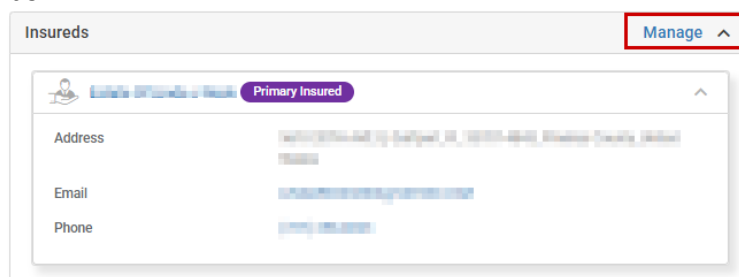
- A Contact is anyone associated with the policy – including the lender, insured, additional insured, agent, sales representative, or underwriter.
- Both the Military and Senior Discounts now relate directly to a Contact, rather than to a policy.
- The Contact Card will list the Insureds Name, Address, Phone Number(s), Email Address, Primary Language preference, Date of Birth and whether they are listed as Active or Retired US Military.

Now, let's review where in Slate to see these discounts and how to request them on an existing policy.

- First, search for the policy number. Once selected, look on the left navigation menu, expand the "Policy" menu option and click "Contacts."



- On the Policy Contacts screen, click "Manage" on the top right of the Insureds box.



- A popup will appear listing basic policyholder information. Click the pencil icon on the far right to view additional options.

- In the new “Edit” popup, scroll down to check the “Active or Retired U.S. Military” box.


When done, click “Save.”

Slate will automatically add the **Senior Discount** based on the Date of Birth listed and the **Military Discount** if checked in the insured’s Contact Card.

Senior Discount:

- Updating the insured’s Date of Birth will require assistance from Underwriting.
 - Please either create an Activity using the “General Underwriting Review Request” template or call Agency Underwriting to request review.
 - If you need help creating an Activity, reference the “What’s an Activity” Slate Quick Reference Guide OR watch the Video Tutorial “How to Use Activities”

Military Discount:

- If you are requesting the Military discount, you must upload proof of military service to be reviewed by Underwriting.
- To upload, click the “Files” tab in the left navigation menu. Click the  icon on the left side of the table, and follow the prompts to upload.
- Select or drop to upload the file, add the corresponding Tag, in this case “Military Documentation,” and then click “Submit”.

Once you click Submit, Underwriting is alerted via an automated Slate Activity. You do not need to call/email to advise us to review.

After Underwriting approves the documentation, you'll see a flag on the Summary screen Policy Flag Bar to indicate to both Agency and People's Trust users that the policyholder is either Active or Retired US Military.

ENVOCK TRACE DR, Jupiter, FL 33458, Palm Beach County Agency Brightway Insurance, LLC 0005-12-00

PFL374118-05 - Active DEC

LEGACY FOREIGN LANGUAGE **ACTIVE OR RETIRED U.S. MILITARY**

Renewal Generation Period Begins 05/20/2024 Renewal Batch Date 06/04/2024 Expiration Date 07/19/2024

Policy Information		Financial Information	
Status	Active	Premium	\$3,516.00
Effective	07/19/2023 EST - 07/19/2024 EST	Fees	\$96.00
Policy Type	HO-3	Payment Plan	Pay in Full
Rating Version	2023.03 (53)	Billing Method	Insured
Revision Date	04/24	Next Payment	\$0.00
Delivery Method	Paperless	Equity Date	07/19/2024 EST
Policy History	New Purchase		

Coverages Endorsements Deductibles **Credits & Surcharges** As of 07/19/2023 (Current)

Credit/Surcharge	Amount
Age Of Home Credit	(\$4)
Building Code Effectiveness Grading Credit	(\$390)
Wind Mitigation Credit	(\$13,112)
Protection Class Construction Credit	(\$4,115)
Distance To Coast Surcharge	\$266
Insurance Score Credit	(\$541)
Senior Discount	(\$111)
Military Discount	(\$106)
Paperless Discount	(\$26)


You will also see on the Summary screen under the "Credits & Surcharges" when an insured is receiving a discount for either the Senior or Military credit. In the image above, they're receiving both!

Now, let's review where in Slate to include these discounts when quoting a new client.

If you are quoting a new client and would like to add either the Senior or Military Discount, both are available when you complete the Contact Card when you are entering an applicant's information.

First, in the "Applicant" dropdown, you will click "Add New Contact."

A New Contact Card with only an address listed will appear. Insert the Name (insureds first and last name), Phone Number, Email Address, the Date of Birth, and, when appropriate, select the checkbox for Active or Retired U.S. Military.



Similar to adding these discounts on an existing policy, once the quote is submitted:

- You'll see a Flag on the Summary screen Policy Flag Bar to indicate to both Agency and People's Trust users that the policyholder is either Active or Retired US Military.
- You will also see on the Summary screen under "Credits & Surcharges" when an insured is receiving a discount for either the Senior or Military credit.
- You'll need to upload proof of military service to be reviewed by Underwriting.
 - To upload, click the "Files" tab in the left navigation menu. Click the icon on the left side of the table, and follow the prompts to upload.