



Slate Quick Reference
How to Add Senior or Military Discount

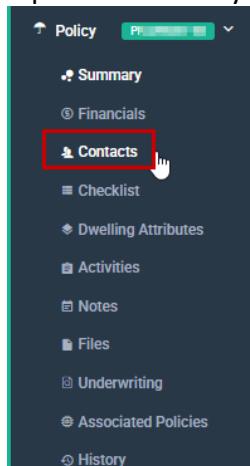
Locating the Military and Senior discounts looks a little different in Slate. Let's go through how you'll find and request both discounts below, for existing policies or new quotes.

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

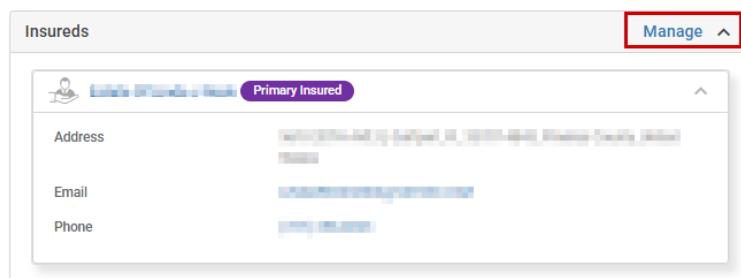
- A Contact is anyone associated with the policy – including the lender, insured, additional insured, agent, sales representative, or underwriter.
- Both the Military and Senior Discounts now relate directly to a Contact, rather than to a policy.
- The Contact Card will list the Insured's Name, Address, 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.

Insureds

Name	Email	Phone Number	Address	Date of Birth	Status	Primary Insured	Actions
John Doe	john.doe@example.com	123-4567-8901	123 Main St, Anytown, USA	11/05/1950	Active	<input checked="" type="checkbox"/>	

Save Cancel

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

Active or Retired U.S. Military

Flags Active Or Retired U.S. Military

Save Cancel

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.

IEENNOCK 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

Status	Active
Effective	07/19/2023 EST - 07/19/2024 EST
Policy Type	HO-3
Rating Version	2023.03 (53)
Revision Date	04/24
Delivery Method	Paperless
Policy History	New Purchase

Financial Information

Premium	\$3,516.00
Fees	\$98.00
Payment Plan	Pay in Full
Billing Method	Insured
Next Payment	\$0.00
Equity Date	07/19/2024 EST

Total \$3,614.00 Invoiced \$3,614.00 Paid \$3,614.00

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 (insured's 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.

New

View Type * Client

Contact Type * Person

Name *

Address

Dwelling Primary
Palm Beach
United States
+ Add Address

Phone * + Add Phone

Email + Add Email

Preferred Language * English

Date of Birth * MM/dd/yyyy

Active or Retired U.S. Military

Flags

Submit Cancel

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.