



WORK SMARTER WITH V²

Your Presenters: Debra McKibben, Vanessa Cole and Peggie Genson

March 10, 2021

INTRODUCTION

Today's Webinar

In February we launched Architects, Engineers & Consultants on our online portal, V², enabling you to quote and issue policies in minutes. In today's webinar, we will:



Summarize V² and how you'll benefit from using it, saving time and money for your business.



Provide a step-by-step guide, explaining how to navigate through the V² portal and get an A&E quote.



Run live Q&As answering any questions you may have.

V² BENEFITS



Simple

V² lets you work remotely and manage your new business anywhere, anytime.

Flexible

You can pick and choose from a range of coverage options to tailor a policy that's made to order.

Fast

Make Victor your first stop. Get a quote in minutes and a pre-filled application you can download.

EXPLORING THE V² PORTAL

Navigate the Dashboard

The dashboard features a top navigation bar with 'Home', 'My Work', 'Get Started', and 'Exit' options. The main content area is titled 'Get Started' and contains six quote tiles: Real Estate E&O, Individual Appraisers E&O, Cyber, Builders Risk, Architects & Engineers, and Non-profit Management Liability. Below this is a 'Queue' section with two tables: 'Most Recent' and 'Currently in Underwriting Review'. A summary bar shows 370 In Progress, 109 Quoted, 5 Issued Waiting for Signature, and 47 Referred to Underwriter. The footer includes 'Customer Support', 'Additional Resources', and 'Build Details'.

Get Started

- Real Estate E&O
- Individual Appraisers E&O
- Cyber
- Builders Risk
- Architects & Engineers
- Non-profit Management Liability

Queue

Most Recent

ID	Name	Status	Policy Type	Effective
9105	M. McLean Realtors	In-Progress	Real Estate E&O	10-01-2019
9109	Realt Appraisers	In-Progress	Real Estate E&O	10-30-2019
9102	Building Others Company	Quoted	Non-profit Management Liability	11-01-2019
7209	ABC Shell	Bound	Cyber Protection	03-25-2019
7915	Bethel Gardens & Home Realty	Quoted	Real Estate E&O	08-26-2019

Currently in Underwriting Review

ID	Name	Status	Policy Type	Effective
8194	ABC Company	Referred to Underwriter	Cyber Protection	10-09-2019
8881	Smith Organization	Referred to Underwriter	Non-profit Management Liability	11-01-2019
8801	Teamworks Companies	Referred to Underwriter	Non-profit Management Liability	11-01-2019
8773	Park Association	Referred to Underwriter	Non-profit Management Liability	11-01-2019
8796	United Good Company	Referred to Underwriter	Non-profit Management Liability	11-01-2019

Summary

- 370 In Progress
- 109 Quoted
- 5 Issued Waiting for Signature
- 47 Referred to Underwriter

Customer Support
Find My Underwriter: (303) 981-8800

Additional Resources
Local Plans
Terms & Conditions

Build Details
Build Number: 015 0017 00263
SVN Version: 15210

EXPLORING THE V² PORTAL

Navigate the Dashboard

Navigate My Work

The screenshot shows the VICTOR V² portal dashboard. At the top left is the VICTOR V² logo. Below it is a navigation bar with 'Home', 'My Work', 'Get Started', and 'Exit'. A filter bar contains 'Policy Type', 'Status', 'Transaction', 'Sort By', 'Search Options', and 'My Filters'. A search bar is labeled 'Search for an item by name (3 character minimum)'. Below the search bar is a table of accounts with columns: ID, Policy Type, Policy Number, Brokerage Name, Name, Location City, State, Effective Date, Underwriter, and Status. The table contains 7 rows of data. A callout 'Filter your list of accounts' points to the filter bar. A callout 'Return to your Dashboard' points to the 'Home' button. A callout 'View accounts in list or tile format' points to a view toggle icon. A callout 'Search for accounts by company name' points to the search bar. A callout 'Open accounts individually to view details and make changes' points to an 'Open' button in the table. The footer contains 'Customer Support', 'Additional Resources', and 'Build Details'.

ID	Policy Type	Policy Number	Brokerage Name	Name	Location City	State	Effective Date	Underwriter	Status
7575	Real Estate ESO		Portals-Chicago Test	ar / test For SC	Hok	NJ	08-26-2019	Sonyo Mills	Quoted
7242	Real Estate ESO		Portals-Chicago Test	The Myers Agency	Hartford	CT	02-28-2019	Sonyo Mills	Referred to Underwriter
7244	Real Estate ESO		Portals-Chicago Test	Mlx & Mlx Real Estate	Des Moines	IA	03-01-2019	Linda Reato	Referred to Underwriter
7502	Real Estate ESO		Portals-Chicago Test	CBA Property Managers	Jarvis	AR	04-25-2019	UMS Visco	Referred to Underwriter
7499	Real Estate ESO		Portals-Chicago Test	Lee Homes	Des Moines	IA	04-25-2019	UMS Visco	Referred to Underwriter
7389	Real Estate ESO		Portals-Chicago Test	Blount Realtors & Property	Montgomery	AL	04-25-2019	UMS Visco	Referred to Underwriter
7504	Real Estate ESO		Portals-Chicago Test	Vulmer Real Estate Services	Montgomery	AL	04-25-2019	UMS Visco	Referred to Underwriter

EXPLORING THE V² PORTAL

Getting a Quote

The screenshot displays the VICTOR V2 portal interface. At the top left is the VICTOR V² logo. The top right navigation bar includes links for Home, My Work, My Reports, Get Started, and Exit. A left-hand sidebar contains a menu with the following items: Insurance Agency Information, General Information (highlighted), Firm Type/Service Type, Project Types, Client Types, Staff Information, Financial Information, Business Information, Risk Management, Prior Coverage, Claims History, Optional Coverages, Quote Options, Generate Quote, Billing and Contact Information, Issue Policy, and Policy Summary. The main content area is titled 'General information' and contains the following form fields:

- * Firm name:
- Physical Address**
- * Address line 1:
- Address line 2:
- * City:
- * State:
- * Zip code:
- * Is your mailing address the same as your physical address?: Yes No
- * Year firm established:
- * Contact first name:
- * Contact last name:
- * Contact e-mail address:
- Phone:
- Website address:
- * Effective date:
- * Are there any other individuals or entities that should be added to the policy as a named insured?: Yes No

At the bottom right of the form area, there is a 'More Actions...' dropdown menu and a 'Continue' button. On the right side of the page, there are three blue buttons: 'Submit Comments & Questions', 'Upload a Document', and 'Users'.

EXPLORING THE V² PORTAL

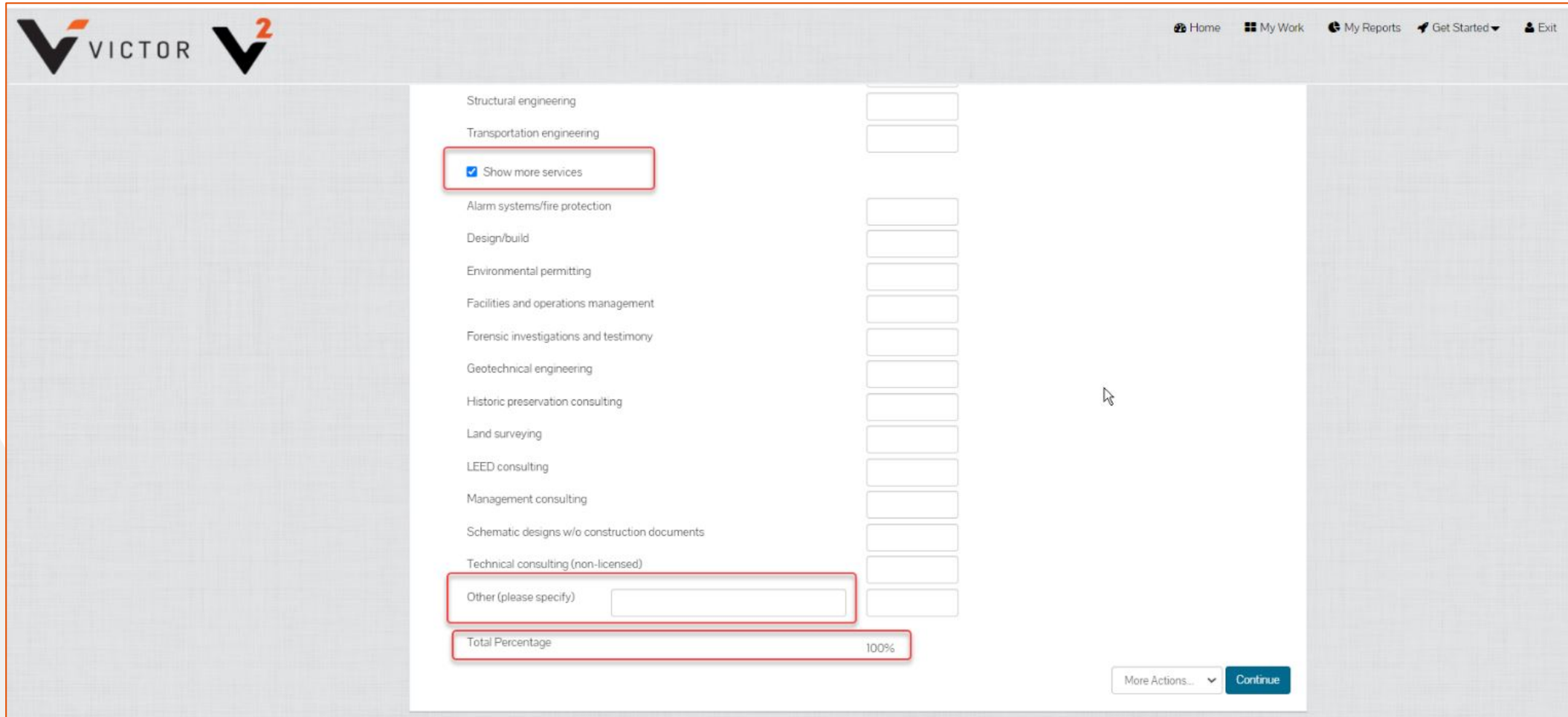
Getting a Quote

The screenshot displays the VICTOR V2 portal interface. On the left is a navigation menu with the following items: Insurance Agency Information, General Information, Firm Type/Service Type (highlighted), Project Types, Client Types, Staff Information, Financial Information, Business Information, Risk Management, Prior Coverage, Claims History, Optional Coverages, Quote Options, Generate Quote, Billing and Contact Information, Issue Policy, and Policy Summary. The main content area is titled 'Firm Type/Service Type' and includes a sub-header '* Please select firm type from the options below'. Below this are radio buttons for Architect (selected), Civil engineering, Electrical engineering, Mechanical engineering, Structural engineering, Consultants, Environmental, Land surveyor, and Landscape architecture. A second question asks '* Is a principal of the firm licensed?' with 'Yes' selected. A light blue box contains the text: 'During the past year, what percentage of your firm's billings were performed in these service areas?'. Below this is a table titled 'Architect' with two columns: 'Service' and 'Percentage'. The table lists various services with corresponding percentage input fields.

Service	Percentage
Architecture	50.%
Chemical engineering	
Civil engineering	
Concept design w/o construction documents	
Construction/program management	
Drafting services	
Electrical engineering	
Environmental abatement	
Environmental impact studies	
Feasibility studies/reports opinions/master plans	
HVAC engineering	
Interior design(non-structural)	25.%
Landscape architecture	25.%

EXPLORING THE V² PORTAL

Getting a Quote



The screenshot displays the VICTOR V² portal interface. The top navigation bar includes the VICTOR V² logo on the left and links for Home, My Work, My Reports, Get Started, and Exit on the right. The main content area is a form for selecting services. A list of services is shown on the left, with corresponding input boxes on the right. The 'Show more services' checkbox is checked. The 'Other (please specify)' field is empty. The 'Total Percentage' is displayed as 100%. At the bottom right, there are 'More Actions...' and 'Continue' buttons.

Service	Input
Structural engineering	<input type="checkbox"/>
Transportation engineering	<input type="checkbox"/>
<input checked="" type="checkbox"/> Show more services	
Alarm systems/fire protection	<input type="checkbox"/>
Design/build	<input type="checkbox"/>
Environmental permitting	<input type="checkbox"/>
Facilities and operations management	<input type="checkbox"/>
Forensic investigations and testimony	<input type="checkbox"/>
Geotechnical engineering	<input type="checkbox"/>
Historic preservation consulting	<input type="checkbox"/>
Land surveying	<input type="checkbox"/>
LEED consulting	<input type="checkbox"/>
Management consulting	<input type="checkbox"/>
Schematic designs w/o construction documents	<input type="checkbox"/>
Technical consulting (non-licensed)	<input type="checkbox"/>
Other (please specify) <input type="text"/>	
Total Percentage	100%

More Actions...

EXPLORING THE V² PORTAL

Getting a Quote

- Insurance Agency Information >
- General Information >
- Firm Type/Service Type >
- Project Types >
- Client Types >
- Staff Information >**
- Financial Information >
- Business Information >
- Risk Management >
- Prior Coverage >
- Client Types >

Staff Information

	Architects	Engineers	Land surveyors	Landscape architects	Other	Total
Principals	<input type="text" value="2"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="1"/>	<input type="text" value="1"/>	4
Staff	<input type="text" value="1"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="2"/>	3
Total	3			1	3	7

* Are more than 50% of the professional staff at the firm members of the American Institute of Architects/National Society of Professional Engineers?

Yes No

More Actions...

-
-
-

EXPLORING THE V² PORTAL

Getting a Quote

- Insurance Agency Information >
- General Information >
- Firm Type/Service Type >
- Project Types >
- Client Types >
- Staff Information >
- Financial Information >**
- Business Information >
- Risk Management >
- Prior Coverage >
- Claims History >
- Optional Coverages >
- Quote Options >
- Generate Quote >
- Billing and Contact Information >
- Issue Policy >
- Policy Summary >

Financial Information

List your client's professional service billing information below, including billings to consultants. The breakdown of billings is critical, as its one of the main factors in premium determination.

Effective date 04-01-2021

	Last 12 months	Next 12 months(Projected)
*Date of reporting periods from	04-01-2020	04-01-2020
*Date of reporting periods to	04-01-2021	04-01-2021
*Gross billings	\$750,000	\$900,000
Direct reimbursable (excluding sub-consultants)	\$10,000	\$15,000
Total billings (Gross billings - Direct reimbursable)	\$740,000	\$885,000
Abandoned projects		
International work		
Separately insured projects		
Sub-consultants		

More Actions... [Continue](#)

- [Submit Comments & Questions](#)
- [Upload a Document](#)
- [Users](#)

EXPLORING THE V² PORTAL

Getting a Quote

- Insurance Agency Information >
- General Information >
- Firm Type/Service Type >
- Project Types >
- Client Types >
- Staff Information >
- Financial Information >
- Business Information >**
- Risk Management >
- Prior Coverage >
- Claims History >
- Optional Coverages >
- Quote Options >
- Generate Quote >
- Billing and Contact Information >
- Issue Policy >
- Policy Summary >

Business Information

Does the firm, any subsidiary, parent or other organization related to the firm, or any principal, partner, officer, director, or employee have a percentage ownership interest, management, or control of a company engaged in:

* Development, sale, or leasing of computer hardware and software to others? Yes No

* Actual construction, installation, fabrication or erection that is over 20% of the services? Yes No

* Real estate development? Yes No

* Manufacture, sale, lease, or distribution of any product, process, or patented production process? Yes No

* Is the firm controlled/owned by or associated with any other entity? Yes No

* Does the firm control any other entity? Yes No

* Has the firm ever been party to any acquisition, consolidation, merger, change in name or change in business organization? Yes No

* Has the firm or any subsidiary or predecessor firm ever filed for or been in receivership or bankruptcy? Yes No

* Has the firm or any member of the firm ever had a professional liability policy cancelled or non-renewed by any insurance company, for any reason other than premium nonpayment? (not applicable in Missouri) Yes No

EXPLORING THE V² PORTAL

Getting a Quote

Insurance Agency Information >			
General Information >			
Firm Type/Service Type >			
Project Types >			
Client Types >			
Staff Information >			
Financial Information >			
Business Information >			
Risk Management >	Risk Management and Loss Prevention		
Prior Coverage >			
Claims History >			
Optional Coverages >			
Quote Options >			
Generate Quote >			
Billing and Contact Information >			
Issue Policy >			
Policy Summary >			

* Does the majority of the staff know and implement the firm's written in-house quality management procedures?	Yes	No
	<input type="radio"/>	<input type="radio"/>
* Do the majority of the firm's projects use an automated master specification system?	Yes	No
	<input type="radio"/>	<input type="radio"/>
* Does the firm have an in-house continuing education program for professional employees?	Yes	No
	<input type="radio"/>	<input type="radio"/>
* In the last year, did at least 50% of the firm's employees attend any risk management seminar/webinar?	Yes	No
	<input type="radio"/>	<input type="radio"/>
* Have at least 50% of the firm's employees completed at least one course within a risk management continuing education program?	Yes	No
	<input type="radio"/>	<input type="radio"/>
* Does the firm use written contracts on all projects?	Yes	No
	<input type="radio"/>	<input type="radio"/>
* Do at least 51% of the firm's written contracts contain specified payment terms?	Yes	No
	<input type="radio"/>	<input type="radio"/>
* Do at least 51% of the firm's projects involve pre-project planning that result in a project-definition document?	Yes	No
	<input type="radio"/>	<input type="radio"/>
* Are at least 51% of the firm's instruments of service or deliverables peer reviewed prior to delivery?	Yes	No
	<input type="radio"/>	<input type="radio"/>

[Submit Comments & Questions](#)

[Upload a Document](#)

[Users](#)

EXPLORING THE V² PORTAL

Getting a Quote

- Insurance Agency Information >
- General Information >
- Firm Type/Service Type >
- Project Types >
- Client Types >
- Staff Information >
- Financial Information >
- Business Information >
- Risk Management >
- Prior Coverage >**
- Claims History >
- Optional Coverages >
- Quote Options >

Prior Coverage

* Does the firm currently carry professional liability coverage? Yes No

* Has the firm insured with Victor/CNA in the last 5 years? Yes No

* Provide the retroactive date:

Premium

Policy Period Effective Date	Insurance Carrier	Limit of Liability Per Claim	Limit of Liability Aggregate	Deductible	Aggregate Deductible	Deductible Type
<input type="text" value="04-01-2020"/>	Beazley <input type="text"/>	\$1,000,000	\$1,000,000	\$5,000	\$5,000	First Dollar <input type="text"/>

- Submit Comments & Questions
- Upload a Document
- Users

EXPLORING THE V² PORTAL

Getting a Quote

- Insurance Agency Information >
- General Information >
- Firm Type/Service Type >
- Project Types >
- Client Types >
- Staff Information >
- Financial Information >
- Business Information >
- Risk Management >
- Prior Coverage >
- Claims History >**
- Optional Coverages >
- Quote Options >
- Generate Quote >

Claims History

* In the past 5 years (or 10 years if applicant has billings over \$10M annually), have any claims/legal actions been brought against the firm, its predecessor(s) or any past/present principal, partner, officer, director, shareholder, or employee? Yes No

Date Of Claim	Claimant	Description	Open or Closed	Amount Reserved	Amount Paid	Total Incurred
06-15-20	Rand Project	HVAC issue	Closed	\$0	\$6,500	\$6,500

Add

* After complete investigation and inquiry, is there any knowledge about any circumstance that could be the basis for a claim under the proposed insurance policy? Yes No

Report knowledge of all such incidents to your current carrier before your current policy expires. The insurance policy you're applying for will not respond to incidents you knew about prior to the policy's effective date, nor will coverage apply to any claim or circumstance identified or that should have been identified above.

More Actions... **Continue**

Submit Comments & Questions

Upload a Document

Users

EXPLORING THE V² PORTAL

Getting a Quote

VICTOR V²

Home My Work My Reports Get Started Exit

Please Wait...

Slight delay while calling out to the rating engine.

Optional Coverages

The data entered will generate a quote based on your client's current primary coverages and the increased limit options selected. If the quote options provided do not meet your client's need, you will be given the opportunity to request specific limits later in the quote process. **If no optional coverages are desired select continue below to skip this screen.**

Defense Outside the Limits

Provides a separate limit to address claims defense expenses. Helps firms with billings up to \$1 million balance the possible erosion of limits due to frivolous claims.

Per claim policy limit 25% 50% None

Specific Additional Limit Endorsement (SALE)

	Select SALE 1 Limit	Select SALE 2 Limit	Select SALE 3 Limit
Sale limit	<input type="text"/>	<input type="text"/>	<input type="text"/>
* SALE for a specific client/project?	<input type="text"/>	<input type="text"/>	<input type="text"/>
* Client/project name	<input type="text"/>	<input type="text"/>	<input type="text"/>
Location	<input type="text"/>	<input type="text"/>	<input type="text"/>
Job/contract	<input type="text"/>	<input type="text"/>	<input type="text"/>

Submit Comments & Questions
Upload a Document
Users

EXPLORING THE V² PORTAL

Getting a Quote

The screenshot displays the VICTOR V2 portal interface. On the left is a navigation menu with items like Insurance Agency Information, General Information, Firm Type/Service Type, Project Types, Client Types, Staff Information, Financial Information, Business Information, Risk Management, Prior Coverage, Claims History, Optional Coverages, Quote Options (highlighted), Generate Quote, Billing and Contact Information, Issue Policy, and Policy Summary. The main content area shows a message: "Based on the information gathered, below are the quote option available to your client:". Below this are two tables. The first table, titled "Primary Coverage", is for "Professional Liability" and lists four options with columns for Select, Per Claim Limit, Aggregate Limit, Deductible, Deductible Type, and Annual Premium. The second table, titled "Optional Coverages", is for "Defense Outside the Limits" and lists four options with columns for Select, Per Claim Policy Limit, Per Claim Limit, Aggregate Limit, Deductible, Deductible Type, and Annual Premium. At the bottom, there is a checkbox labeled "Select here for Additional Limits or Coverages" with a callout box stating "Specific coverage requests can be made here." and two buttons: "Refresh Quote" and "Continue". On the right side of the portal, there are several action buttons: "Submit Comments & Questions", "Upload a Document", "Users", "UMS", and "Nexsure". The top right of the page has navigation links for Home, My Work, My Reports, Get Started, and Exit.

Home My Work My Reports Get Started Exit

Insurance Agency Information >
General Information >
Firm Type/Service Type >
Project Types >
Client Types >
Staff Information >
Financial Information >
Business Information >
Risk Management >
Prior Coverage >
Claims History >
Optional Coverages >
Quote Options >
Generate Quote >
Billing and Contact Information >
Issue Policy >
Policy Summary >

Based on the information gathered, below are the quote option available to your client:

Primary Coverage

Professional Liability

Select	Per Claim Limit	Aggregate Limit	Deductible	Deductible Type ?	Annual Premium
<input type="checkbox"/>	\$1,000,000	\$1,000,000	\$5,000	First Dollar	\$6,623
<input type="checkbox"/>	\$1,000,000	\$1,000,000	\$5,000	Standard	\$6,420
<input type="checkbox"/>	\$1,000,000	\$1,000,000	\$10,000	First Dollar	\$6,543
<input type="checkbox"/>	\$1,000,000	\$1,000,000	\$10,000	Standard	\$6,202

Optional Coverages

Defense Outside the Limits

Select	Per Claim Policy Limit	Per Claim Limit	Aggregate Limit	Deductible	Deductible Type ?	Annual Premium
<input type="checkbox"/>	50%	\$1,000,000	\$1,000,000	\$5,000	First Dollar	\$662
<input type="checkbox"/>	50%	\$1,000,000	\$1,000,000	\$5,000	Standard	\$642
<input type="checkbox"/>	50%	\$1,000,000	\$1,000,000	\$10,000	First Dollar	\$654
<input type="checkbox"/>	50%	\$1,000,000	\$1,000,000	\$10,000	Standard	\$620

Select here for Additional Limits or Coverages

Specific coverage requests can be made here.

Refresh Quote Continue

Submit Comments & Questions
Upload a Document
Users
UMS
Nexsure

EXPLORING THE V² PORTAL

Getting a Quote

VICTOR V²

Home My Work My Reports Get Started Exit

- Firm Type/Service Type >
- Project Types >
- Client Types >
- Staff Information >
- Financial Information >
- Business Information >
- Risk Management >
- Prior Coverage >
- Claims History >
- Optional Coverages >
- Quote Options >
- Generate Quote >**
- Billing and Contact Information >
- Issue Policy >
- Policy Summary >

Primary Coverage

Select	Per Claim Limit	Aggregate Limit	Deductible	Deductible Type ?	Annual Premium
<input type="radio"/>	\$1,000,000	\$1,000,000	\$5,000	First Dollar	\$6,623
<input checked="" type="radio"/>	\$1,000,000	\$1,000,000	\$10,000	First Dollar	\$6,543

Optional Coverages

Select	Per Claim Policy Limit	Per Claim Limit	Aggregate Limit	Deductible	Deductible Type ?	Annual Premium
<input type="radio"/>	50%	\$1,000,000	\$1,000,000	\$5,000	First Dollar	\$662
<input checked="" type="radio"/>	50%	\$1,000,000	\$1,000,000	\$10,000	First Dollar	\$654
<input type="radio"/>	None					

Total Premium: \$7,197.00

View Documents

Documents may take a few seconds to generate. If you receive an error message, please close the document, wait a few seconds and click on the document name to try again.

Pre-filled Application Quote Letter

Documents are available for viewing and downloading.

Continue

- Upload a Document
- Users
- UMS
- Nexsure

EXPLORING THE V² PORTAL

Issuing a Policy

The screenshot displays the VICTOR V² portal interface. The top navigation bar includes links for Home, My Work, My Reports, Get Started, and Exit. The left sidebar lists various information categories: Insurance Agency Information, General Information, Firm Type/Service Type, Project Types, Client Types, Staff Information, Financial Information, and Business Information. The main content area is titled "Billing Information" and includes sections for "Billing preferences" and "Agency Bill". Under "Billing preferences", there is a "* Payment plan" dropdown menu currently set to "Annual". A yellow callout box with a pointer to the dropdown menu contains the text: "Installment payment plans, if available, will display here." Below this, the "Broker Contact Information" section contains a question: "Is the accounting contact the same as the primary contact?" with radio buttons for "Yes" (selected) and "No". At the bottom right of the main content area, there are "More Actions..." and "Continue" buttons. The right sidebar contains several action buttons: "Submit Comments & Questions", "Upload a Document", "Users", "UMS", and "Nexsure".

EXPLORING THE V² PORTAL

Issuing a Policy

VICTOR V²

Home My Work My Reports Get Started Exit

- Insurance Agency Information >
- General Information >
- Firm Type/Service Type >
- Project Types >
- Client Types >
- Staff Information >
- Financial Information >
- Business Information >
- Risk Management >
- Prior Coverage >
- Claims History >
- Optional Coverages >
- Quote Options >
- Generate Quote >
- Billing and Contact Information >
- Issue Policy >**
- Policy Summary >

Primary Coverage

Professional Liability

Per Claim Limit	Aggregate Limit	Deductible	Deductible Type ?	Annual Premium
\$1,000,000	\$1,000,000	\$10,000	First Dollar	\$6,543

Optional Coverages

Defense Outside the Limits

Per Claim Policy Limit	Per Claim Limit	Aggregate Limit	Deductible	Deductible Type ?	Annual Premium
50%	\$1,000,000	\$1,000,000	\$10,000	First Dollar	\$654

Total Premium: \$7,197.00

View Documents

Documents may take a few seconds to generate. If you receive an error message, please close the document, wait a few seconds and click on the document name to try again.

- Pre-filled Application
- Quote Letter

Issue Policy Continue

- Submit Comments & Questions
- Upload a Document
- Users
- UMS
- Nexsure

EXPLORING THE V² PORTAL

Policy Summary

The screenshot displays the VICTOR V² portal interface. At the top left is the VICTOR V² logo. The top right navigation bar includes links for Home, My Work, My Reports, Get Started, and Exit. A left-hand sidebar contains a list of menu items, with 'Policy Summary' highlighted in blue. The main content area features a status box at the top with the text 'Issued Waiting for Signature' circled in green. Below this, two text boxes provide instructions: the first states that the policy has been issued and documents are available; the second explains that a client-signed copy of the application summary must be uploaded to finalize the transaction. A 'Documents' section lists 'Quote Letter', 'Policy Package', 'Billing Notice', and 'Application Summary', with the 'Application Summary' item circled in green. A callout box points to this item, stating: 'Once the application is signed, simply drag and drop to upload document here and you are done! It is that simple!'. To the right of the main content is a vertical stack of buttons: 'Submit Comments & Questions', 'Upload a Document', 'Users', 'UMS', and 'Nexsure'. An 'Exit' button is located at the bottom right of the main content area.

VICTOR V²

Home My Work My Reports Get Started Exit

Insurance Agency Information >

General Information >

Firm Type/Service Type >

Project Types >

Client Types >

Staff Information >

Financial Information >

Business Information >

Risk Management >

Prior Coverage >

Claims History >

Optional Coverages >

Quote Options >

Generate Quote >

Billing and Contact Information >

Issue Policy >

Policy Summary >

Issued Waiting for Signature

The policy has been issued and the policy package has been emailed to you. Additional policy documents are available below.

You are nearly done with this policy. To finalize this transaction, please upload a client-signed copy of the application summary using the Upload a Document feature.

You may login anytime to get copies of policy documents. We appreciate your business and look forward to working on your next account.

Documents

Quote Letter

Policy Package

Billing Notice

Application Summary

Once the application is signed, simply drag and drop to upload document here and you are done! It is that simple!

Submit Comments & Questions

Upload a Document

Users

UMS

Nexsure

Exit

EXPLORING THE V² PORTAL

Features and Functionality

The diagram illustrates the transition from a collapsed view to an expanded view of the V2 Portal interface. On the left, the 'Collapsed View' shows two stacked buttons: 'Submit Comments & Questions' and 'Upload a Document'. On the right, the 'Expanded View' shows the 'Submit Comments & Questions' button expanded into a text input field with a 'Comment' button below it. The 'Upload a Document' button is expanded into a section titled 'Upload a Document' containing an 'Add File' button, a dashed box for file upload with the text 'Drag file here' and a document icon, a 'Document Type' dropdown menu, and 'Upload' and 'Cancel' buttons.

Collapsed View

- Submit Comments & Questions
- Upload a Document

Expanded View

- Submit Comments & Questions
- Upload a Document
 - Add File
 - Drag file here
 - Document Type
 - Upload
 - Cancel

Use the *Submit Comments & Questions* feature to provide additional information about an applicant. Once submitted, your comment or question is emailed to underwriting.

Use the *Upload a Document* feature to upload client-signed applications, provide loss documentation, and more.

QUESTIONS?



CONTACT INFORMATION



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Webpage: www.victorinsuranceus.com/design

General email: design.us@victorinsurance.com

V² REGISTRATION AND ADDITIONAL RESOURCES

First Time User

- Visit [victorinsuranceus.com/register](https://www.victorinsuranceus.com/register) to create a Victor account.
- To login for the first time, visit [victorinsuranceus.com/vsquared](https://www.victorinsuranceus.com/vsquared) and click “log in.” Enter your username and password.

Additional Resources

- Underwriting Support: <https://www.victorinsuranceus.com/FindUnderwriter.aspx>
- Technical Support: vsquared.us@victorinsurance.com
- V² User Guide:
https://www.victorinsuranceus.com/Content/V_Squared/V_Squared_Playbook.aspx
- V² Quote & Issue Live Demo: <https://vimeo.com/514033957>

FAQS

- **Does V² give me the same policy I've always received from Victor?** Yes. You get the same A rated, admitted insurance policy when you use V².
- **Can I do renewals in V²?** No. At this time V² is a new business portal. However, we are working to include renewals in future enhancements of V².
- **How do I upload a document?** To upload documents, go to specific account and use the 'Upload a Document' feature located on the right side of the page.
- **I have to update some information I entered for a client. How do I do that?** You can make edits in the General Information section, or use the Submit Comments & Questions feature to provide the new information.
- **How do I save and exit when I'm working with V²?** V² automatically saves your work as you go. You can also use the Save and Exit function at the bottom of each page under the 'More Options' drop down.
- **Will I be required to use V²?** No. However, once you see how easy it is to use and experience the benefits of instant quotes and application management, we think you will want to use V².

FAQS

- **Do I have to use the pre-populated application generated by V²?** This is a feature that many brokers are most excited about, however you will not be required to use the pre-populated application. Keep in mind that in order to finalize policy issuance in V², you must upload the signed application or supplemental application to V².
- **Are loss runs required to submit an application in V²?** V² includes a question for prior claims experience, so loss runs will only be required in certain situations, i.e. insureds that exceed a certain number of claims or firms with billings above set parameters.
- **Will V² display only submissions I have entered or will paper applications submitted directly to Victor be available in V² as well?** V² will display submissions you enter into V² and all submissions within set underwriting parameters sent directly to Victor.
- **Should I still submit applications into V² if the billings are outside underwriting parameters?** Sure! Having a submission entered through V² increases efficiency, even for submissions that require an underwriter review. V² will identify the reason for the review and notify our underwriters, allowing our team to focus on the issue and respond faster. Additionally, having your complete book of business in one place will improve efficiency and policy management, especially when we are able to offer automatic renewals in V².

FAQS

- **When will I receive a response on a submission that requires underwriter review?** Our expectation is to respond within 24 hours during regular working hours.
- **When will I receive a response if I submit a comment or question in V²?** Our expectation is to respond within 24 hours during regular working hours.
- **Can I get a V² demo for me and/or my team?** Absolutely! Please reach out to your regional marketing contact.
- **Are all A&E programs now available on V²?** At this time, all A&E programs except Contractors are available on V².
- **What type of firms/risk exposures are most likely to be able to be quoted without requiring an underwriter review?**
We expect the guidelines for submissions not requiring underwriter intervention or “no-touch” to expand over time, but to start:
 - risks under \$1M in billings
 - coverage limits no more than \$1M
 - no more than 1 claim in the last 5 years
 - no claim over \$10,000 in the last 5 years



THANK YOU