

Westchester TankSafe® User Guide



For Access:

[ACE CRS Command Center2@chubb.com](mailto:ACE_CRS_Command_Center2@chubb.com)

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Disclaimer: This material contains product summaries intended for use solely by properly licensed insurance professionals. The insurance policy actually issued contains the terms and conditions of the contract. All products may not be available in all states and surplus lines products can be offered only through licensed surplus lines producers. Insurance described is provided by ACE American Insurance Company and its U.S. based Chubb underwriting company affiliates. Chubb is the marketing name used to refer to subsidiaries of Chubb Limited providing insurance and related services. For a list of these subsidiaries, please visit our website at www.chubb.com. Westchester, 11575 Great Oaks Way, Alpharetta, GA 30022.

Thank you for using Westchester TankSafe®

If you cannot access the system or have any issues, please report the problem to:

[ACE CRS Command Center2@chubb.com](mailto:ACE_CRS_Command_Center2@chubb.com)

To ensure timely processing, please include:

- The policy number, and
- The insured's name as listed on the policy

Login

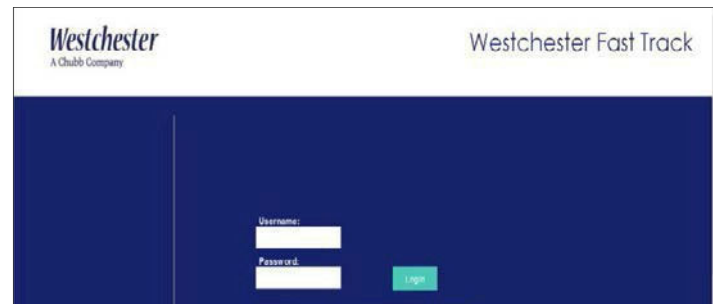
Enter your Westchester username and password.

link: <https://ft.westchester.com>

- Username
- Password

For password or other problems accessing the system, please contact:

[ACE CRS Command Center2@chubb.com](mailto:ACE_CRS_Command_Center2@chubb.com)



Account Revocation

Ninety (90) days of inactivity

Your access to TankSafe® will be revoked if your account is inactive for ninety (90) days or more. To reactive, please email: [ACE CRS Command Center2@chubb.com](mailto:ACE_CRS_Command_Center2@chubb.com)

Licenses

Please note that as a Westchester approved user of the Westchester online systems, you conform to and operate only under the authority, if any, granted by your Westchester producer agreement. For each submission you must have a producer license in the state in which the insured maintains its principal place of business. If you have any questions or concerns, please contact the TankSafe® Administrator at [ACE CRS Command Center2@chubb.com](mailto:ACE_CRS_Command_Center2@chubb.com).

The broker must hold the appropriate license in the Insured's state of domicile and submit that License Number in TankSafe® before the account binds. Westchester performs monthly audits on the information provided. If a license number is invalid, a warning will be issued via a formal letter to the broker. Further non-compliance due to licensing issues will be grounds for termination of access to TankSafe®. Access may be reinstated on a case-by-case basis and with evidence of proper individual and agency licenses.

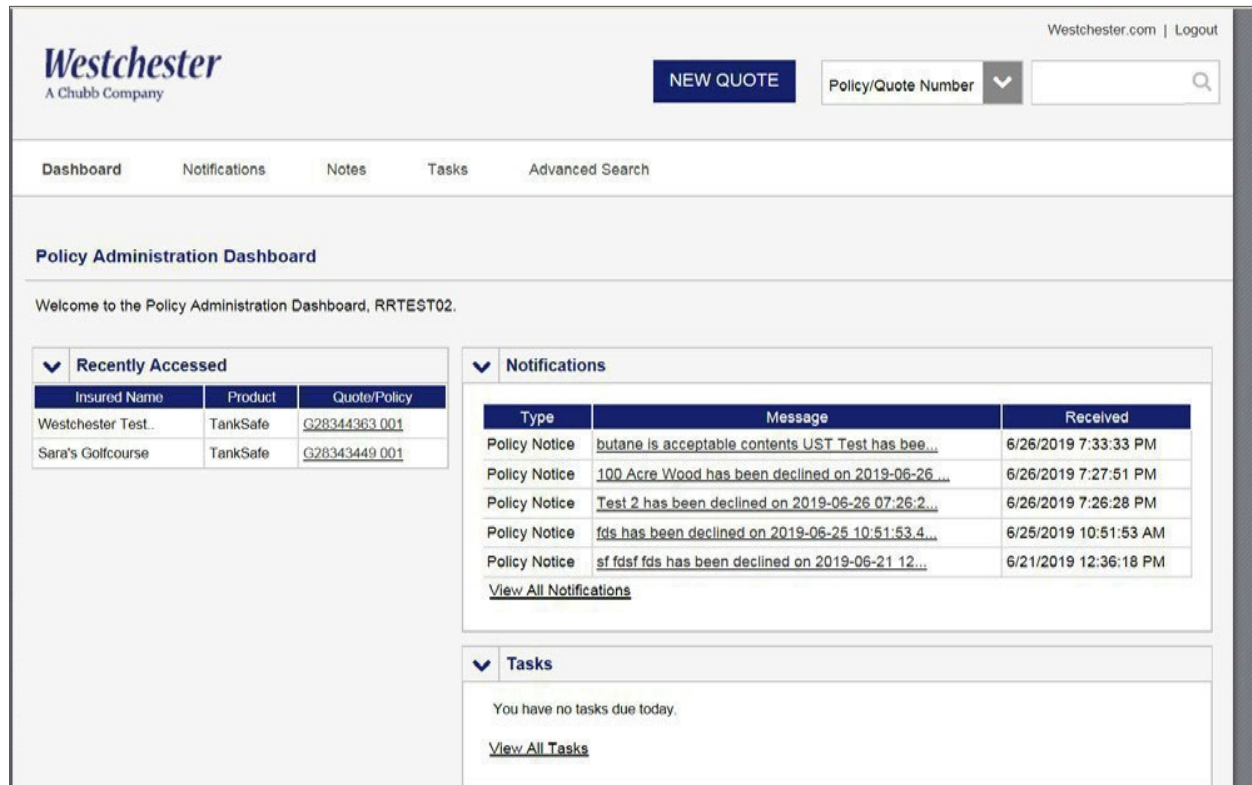
Licensing Disclaimer: Nothing in this notice is meant to remove, change or supersede the responsibility of any broker to comply with the requirements of any given jurisdiction(s) including, but not limited to, licensing requirements or the proper payment of all applicable taxes.

Audit Requirements

Westchester reserves the right to perform periodic audits on the broker's TankSafe® book.

Westchester FastTrack Dashboard

The Westchester Fast Track Dashboard lists all the submissions and policies assigned to your Westchester Producer Code.



Westchester.com | Logout

NEW QUOTE

Policy/Quote Number

Dashboard Notifications Notes Tasks Advanced Search

Policy Administration Dashboard

Welcome to the Policy Administration Dashboard, RRTEST02.

Recently Accessed

Insured Name	Product	Quote/Policy
Westchester Test..	TankSafe	G28344363 001
Sara's Golfcourse	TankSafe	G28343449 001

Notifications

Type	Message	Received
Policy Notice	butane is acceptable contents UST Test has bee...	6/26/2019 7:33:33 PM
Policy Notice	100 Acre Wood has been declined on 2019-06-26...	6/26/2019 7:27:51 PM
Policy Notice	Test 2 has been declined on 2019-06-26 07:26:2...	6/26/2019 7:26:28 PM
Policy Notice	fds has been declined on 2019-06-25 10:51:53.4...	6/26/2019 10:51:53 AM
Policy Notice	sf fdsf fds has been declined on 2019-06-21 12...	6/21/2019 12:36:18 PM

[View All Notifications](#)

Tasks

You have no tasks due today.

[View All Tasks](#)

This page provides several basic functions:

Search: The search function is in the top right corner. Be sure to select whether you are searching by Policy/Quote Number or Client Name in the drop down. Provide Policy/Quote Number or Client Name in the box to the right of the drop down; click on the magnifying glass or press enter.

Recently Accessed: This section will allow you to quickly reenter your most recent submissions.

Tasks: To view a submission or policy on the dashboard, click on the insured name or "View All Tasks". After selecting insured name, click on Policy/Quote #, which will take you to your Fast Track record.



Tasks

You have no tasks due today.

[View All Tasks](#)

Notifications: To view the status of your submissions on the dashboard, click on the Message.

Notifications		
Type	Message	Received
Policy Notice	JD Test 9-3-19 has been declined on 2019-09-03...	9/3/2019 2:48:11 PM
Policy Notice	Test 1 has been declined on 2019-08-15 03:23:1...	8/15/2019 3:23:17 PM
Policy Notice	Admitted Test 2 has been declined on 2019-08-1...	8/15/2019 3:15:36 PM
Policy Notice	Tracker Broker Test has been approved on 2019-...	8/15/2019 10:51:11 AM
Policy Notice	frgreg has been approved on 2019-08-06 01:15:0...	8/6/2019 1:15:05 PM

[View All Notifications](#)

Advanced Search: This search function located on the dashboard, allows for broader search criteria with the following options:

- All policies and quotes
- All clients
- Specific policies and quotes
- Specific clients

NEW QUOTE

Policy/Quote Number

Westchester.com | Logout

Dashboard
Notifications
Notes
Tasks
Advanced Search

Search for Policies, Quotes, and Clients

I'm looking for:

All Policies and Quotes

All Clients

Specific Policies and Quotes

Specific Clients

Search in:

All agents

Include previous terms

Show only deleted policies

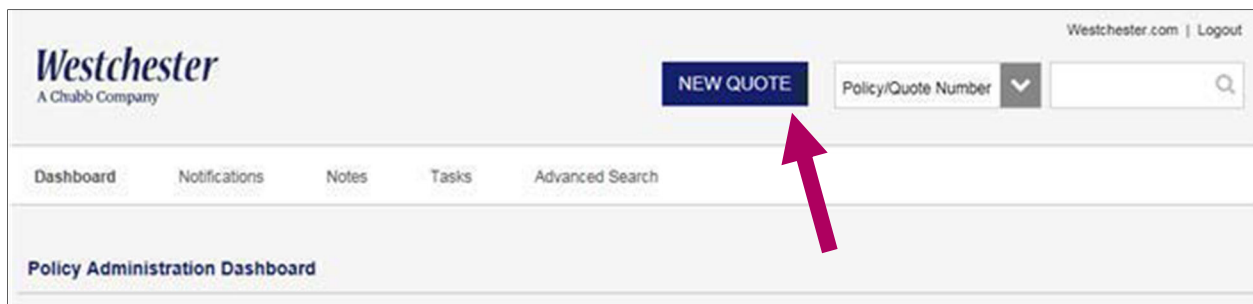
Search

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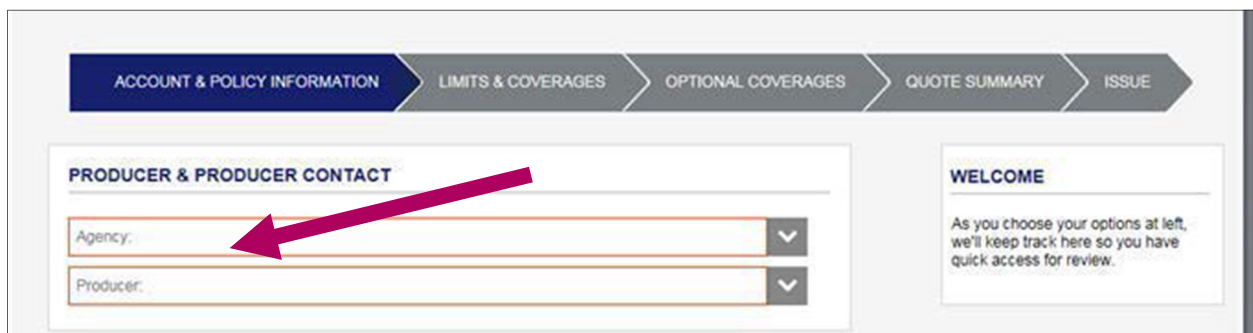
www.westchester.com

New Policy (Quote)

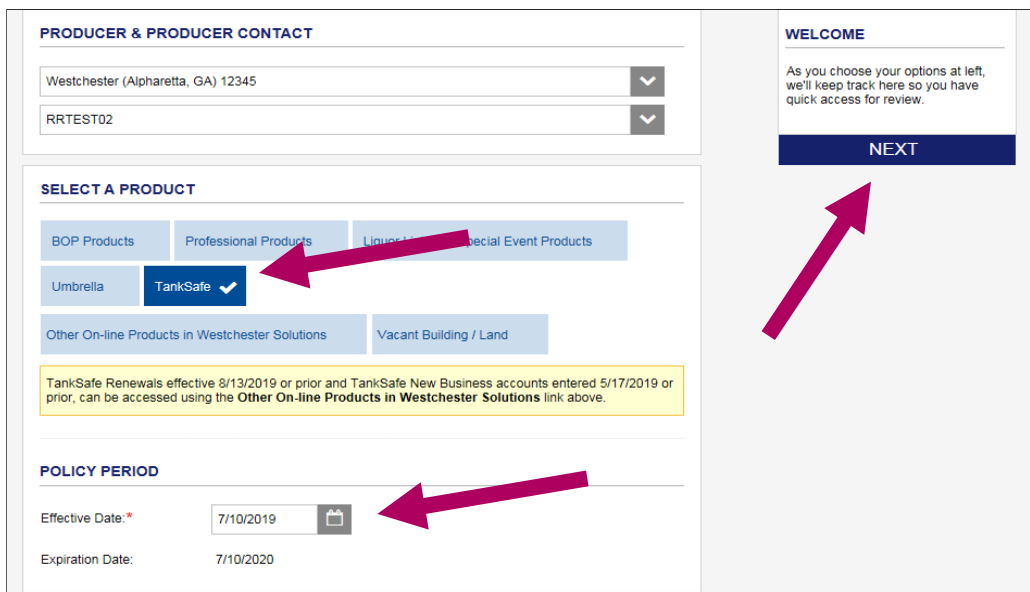
To begin a new submission, click the **New Quote** button at the top of the Dashboard screen.



The next screen is **Producer and Producer Contact**. Select your **Agency** and **Producer**.

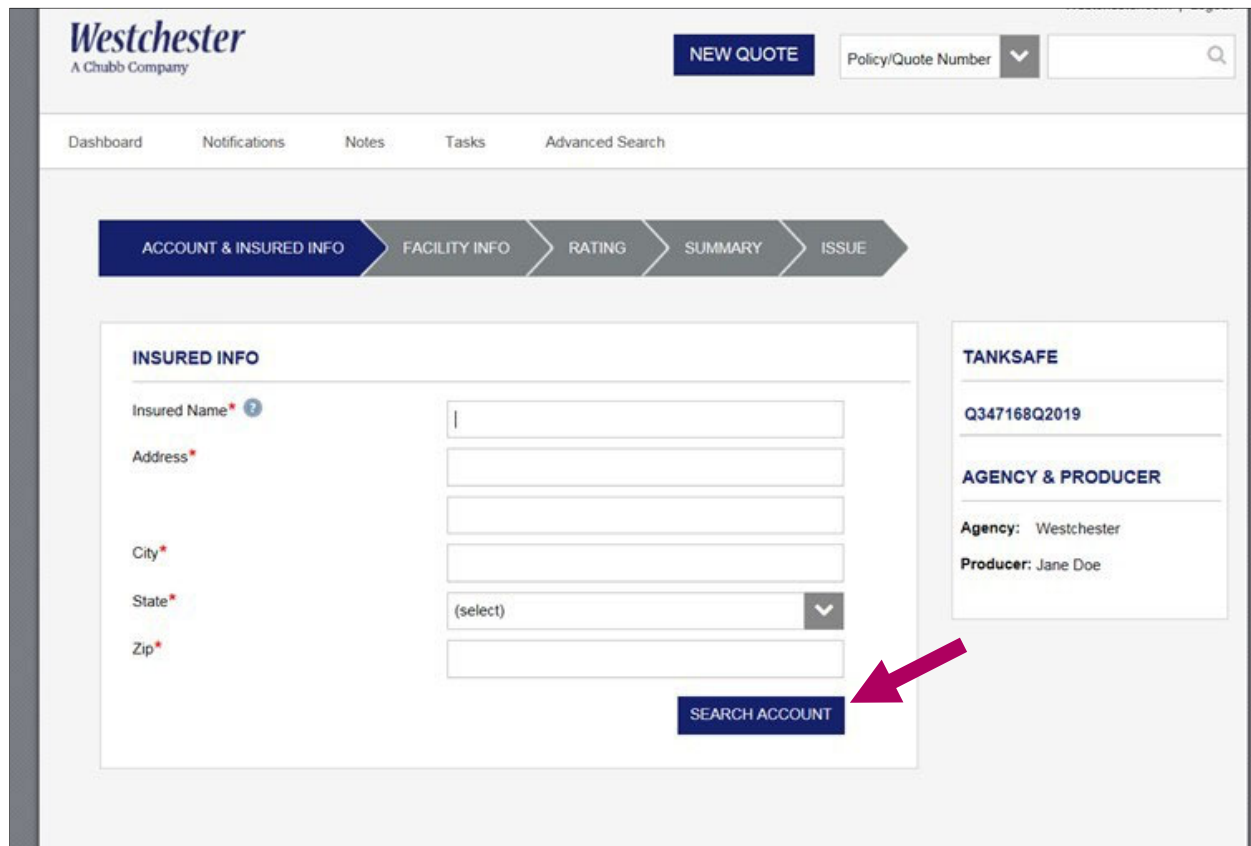


Once the Agency and the Producer has been selected, Fast Track product icons will appear. Select **TankSafe** and choose the **Effective Date** of your policy. Click **Next** on the right-hand side of the screen to continue.



Note: The effective date cannot be prior to the data entry date.

Account & Insured Info



Westchester
A Chubb Company

NEW QUOTE

Policy/Quote Number

Dashboard Notifications Notes Tasks Advanced Search

ACCOUNT & INSURED INFO FACILITY INFO RATING SUMMARY ISSUE

INSURED INFO

Insured Name* ?

Address*

City*

State*

Zip*

(select)

SEARCH ACCOUNT

TANKSAFE

Q347168Q2019

AGENCY & PRODUCER

Agency: Westchester

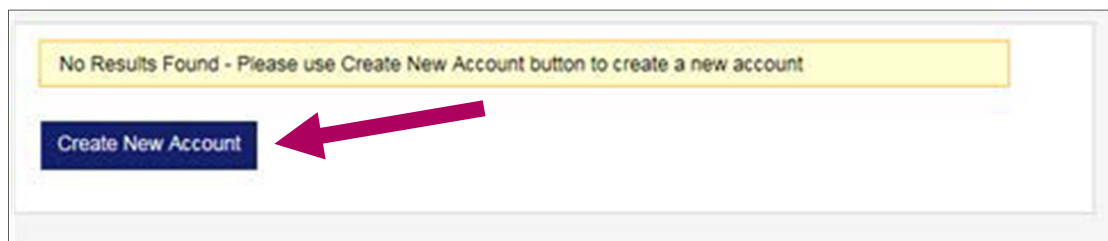
Producer: Jane Doe

On the **Account & Insured Info** page, the following information must be entered:

- Insured Name (Should be one (1) entity. For all other entities, please reach out to your underwriter.)
- Address
- City
- State
- Zip

After this information is entered, select the **Search Account** button.

The search will provide Insureds, from which you select the appropriate one. If none appear, click on the **Create New Account** button.



No Results Found - Please use Create New Account button to create a new account

Create New Account

Additional information is required on the **Account and Insured Info** page to proceed.
Select the appropriate **Industry Classification**.

The screenshot shows the 'INSURED INFO' section of a web form. Fields include 'Insured Name', 'Address', 'City', 'State', 'Zip', 'FEIN', and 'Industry Classification'. The 'Industry Classification' dropdown is open, showing a list of categories such as 'Airport - 4581', 'Convenience Stores - 5411', 'Gasoline Service Stations - 5541', 'Marinas - 4493', 'Automobile and other motor Vehicles - 5012', 'Schools and Educational Services - 8299', 'Petroleum Bulk Stations and Terminals - 5171', 'Motor Vehicle Dealers (New and Used) - 5511', 'Operators of Apartment Buildings - 6513', 'Public Golf Courses - 7992', 'Membership Sports and Recreation Clubs - 7997', 'General Medical and Surgical Hospital - 8062', and 'Hotel and Motels - 7011'. A red arrow points to the 'Industry Classification' field.

If you choose gasoline service stations, convenience stores or petroleum bulk stations and terminals, a second drop down box will appear to select the **Petroleum Brand**.

This screenshot shows the 'Petroleum Brand' dropdown menu, which is open. The menu lists various brands: '(Select)', 'BP', 'Citgo', 'Conoco, 76, Phillips 66, Jet', 'ExxonMobil, Esso, Exxon, Mobil', 'Getty', 'Gulf Oil', 'Hess', 'Lukoil', 'Sunoco', 'Valero, Texaco', and 'Other'. A red arrow points to the 'Petroleum Brand' field.

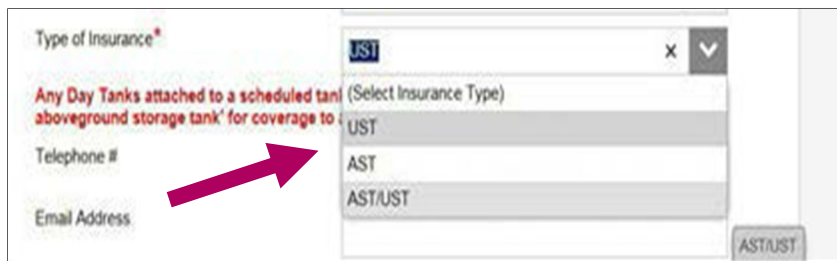
Note: If the petroleum brand is not available from the options, select **Other** and input the petroleum brand.



The screenshot shows a form with three dropdown menus. The first is labeled 'Industry Classification*' and has 'Gasoline Service Stations - 5541' selected. The second is labeled 'Petroleum Brand*' and has 'Other' selected. The third is labeled 'Other Brand*' and has 'Marathon' selected. A red arrow points from the 'Other Brand*' label to the 'Marathon' option.

Select the **Type of Insurance**.

- AST - Aboveground Storage Tanks
- UST – Underground Storage Tanks
- AST/UST – Combination Policy with types of storage tank



The screenshot shows the 'Type of Insurance*' dropdown menu open. The selected option is 'UST'. Below the dropdown, there is a red warning message: 'Any Day Tanks attached to a scheduled tank aboveground storage tank' for coverage to'. Below the warning, there are fields for 'Telephone #' and 'Email Address'. A red arrow points from the 'Email Address' label to the dropdown menu.

When **Type of Insurance** is selected, the following message will appear regarding day tanks:

Any Day Tanks attached to a scheduled tank system are required to be scheduled as a 'Covered aboveground storage tank' for coverage to apply.

Note: There is optional information that can be input on the **Account and Insured Info** page. This information is not required to proceed with submissions.

- Telephone number of the applicant
- Email address of the applicant
- Federal Employer Identification Number (FEIN) of the applicant (nine (9) digits)

The **Loading and Unloading** coverage question is automatically checked as **Yes**

If you choose to select **No** for Loading and Unloading coverage, the following message will appear:

Loading and Unloading is a required coverage to be compliant with financial responsibility regulations. Do you still want to remove this coverage?

Note: If you continue with the No selection for the Loading and Unloading coverage, a certificate of financial responsibility will not generate.

The **Additional Insured** option is available and includes the following information fields:

- Additional Insured Name
Note: This is the only required field
- Address
- City
- State
- Zip Code

If there is more than one additional insured, select the **Add Another Additional Insured** button. To delete an additional insured, select the **Delete** button. Choose **Next** to continue.

Facility Info

On the **Facility Info** page, you will input information about the facility including USTs and/or ASTs. The information entered on this page is used to create the Certificate(s) of Financial Responsibility.

The following information must be entered:

- Facility name
- Facility address
- City
- State
- Zip

The **Facility Registration ID** is a site identification number assigned by a regulatory agency to the location of the facility as explained in [?](#). This number will automatically populate for any Certificate of Financial Responsibility issued on an account.

Once the **Facility Name** and **Facility Address** fields are completed, select the Refresh Map button and the location should appear on the map.

Choose **Next** to continue.

Adding Tanks

To add Aboveground Storage Tanks/Underground Storage tanks go to the specific Storage Tank Details. If both AST and UST coverage is selected, both will appear on the Facility Info page as shown below.

The screenshot shows two distinct sections for adding tanks. The top section is titled 'Aboveground Storage Tank Details' and contains a dark blue header 'Aboveground Storage Tank List', a button labeled 'Import AST Details from Spreadsheet', and a button labeled 'Add AST'. The bottom section is titled 'Underground Storage Tank Details' and contains a dark blue header 'Underground Storage Tank List', a button labeled 'Import UST Details from Spreadsheet', and a button labeled 'Add UST'.

An AST spreadsheet upload option is available on the **Aboveground Storage Tank Details** section. Click on **Import AST Details from Spreadsheet**.

Once the template is downloaded and completed, use the **Browse** and **Upload** buttons to select and import the spreadsheet tank data.

The screenshot displays the 'AST Upload' form within the 'Westchester Fast Track' interface. At the top, it says 'AST Upload'. Below this, a note states '* indicates a required field.' The form includes an 'Attachment*' field with a 'Browse...' button. To the right of the form are 'Upload' and 'Cancel' buttons. A link for 'Download Template' is also present. Below the form, a paragraph explains that the template is used for uploading tank-specific information and that exposure information can be entered manually. A list of instructions follows:

- All information must be completed in full. Once all tank information has been input, the subsequent rows may be left blank.
- Tank information uploads are applicable only on a per facility basis. If there are several facilities to be provided coverage, multiple completed templates will be needed.
- There are different upload templates for ASTs vs. USTs. Please ensure the correct template is used to provide tank information
- The uploaded templates will be saved to the account file. Tank-specific information can then further be updated manually via the TankSafe system interface.

Another option is to manually enter the information by clicking **Add AST**.


Aboveground Storage Tank Details


Aboveground Storage Tank List


Tank 1

Import AST Details from Spreadsheet

AST's ID*

Installation Date* 


Retroactive Date* 

AST Secondary Containment* 

Piping Secondary Containment* Yes No

Automatic Overfill/Spill Protection and/or Electronic Leak Detection* Yes No

AST's Capacity Gallons*

Tank Content* 

After manually entering AST information, you can select the **Duplicate AST** button. The Duplicate AST button copies your most recent entry leaving the only item to be input as the AST's ID.

Another way to add additional ASTs, is to select **Add Another AST** button, which will allow you to manually enter in the ASTs information.

To delete an AST, select the **Delete AST** button.

An UST spreadsheet upload option is available on the **Underground Storage Tank Details** section. Click on **Import UST Details from Spreadsheet**.

Once the template is downloaded and completed, use the **Browse** and **Upload** buttons to select and import the spreadsheet tank data.

The screenshot shows a web application window titled "Westchester Fast Track" with a sub-header "U S T Upload". A red asterisk indicates a required field. The "Attachment*" label is next to an empty text box and a "Browse..." button. To the right are "Upload" and "Cancel" buttons. Below is a "Download Template" link and a paragraph of instructions followed by a bulleted list.

U S T Upload

** indicates a required field.*

Attachment*

[Download Template](#)

The above template can be used to upload tank-specific information for each facility. Exposure information may also be entered manually. Please note:

- All information must be completed in full. Once all tank information has been input, the subsequent rows may be left blank.
- Tank information uploads are applicable only on a per facility basis. If there are several facilities to be provided coverage, multiple completed templates will be needed.
- There are different upload templates for ASTs vs. USTs. Please ensure the correct template is used to provide tank information.
- The uploaded templates will be saved to the account file. Tank-specific information can then further be updated manually via the TankSafe system interface.

Another option is to manually enter the information by clicking **Add UST**.

Underground Storage Tank Details

Underground Storage Tank List

UST 1

UST's ID*	UST 1
Installation Date*	07/01/2019 <input type="button" value="📅"/>
Retroactive Date*	07/24/2019 <input type="button" value="📅"/>
UST Construction*	Double Walled <input type="button" value="▼"/>
UST's Capacity Gallons*	15,000
Tank Content*	Other <input type="button" value="▼"/>
Tank Details*	Other <input type="button" value="▼"/>
Description*	Water

After manually entering UST information, you can select the **Duplicate UST** button. The Duplicate UST button copies your most recent entry leaving the only item to be input as the UST's ID.

Another way to add additional USTs, is to select **Add Another UST** button, which will allow you to manually enter in the USTs information.

To delete a UST, select the **Delete UST** button.

For the **AST/UST ID**, you can input your own nomenclature to identify each tank (e.g. UST-01 or AST-01).

Note: If you do not have any particular nomenclature, then designate the tanks as 1, 2, 3, etc.

For the **Installation Date**, use the date of when the tank was installed.

Regarding the **Retroactive Date**, up to 10 years of Retroactive Date coverage can be selected.

Located on the **Facility Info** page are **Facility Level Questions**. These questions must be answered before continuing to the next page.

▼
FACILITY LEVEL QUESTIONS

Is there leak detection and tank maintenance for all storage tanks present at this facility?(For example, Statistically Inventory Reconciliation (SIR) with Annual Tank Tightness Testing or Automatic Tank Gauging (ATG)Electronic Monitoring for USTs; Automatic overfill/spill protection and/or electronic leak detection for ASTs.)*

Do you have a written Spill Prevention Control & Countermeasures (SPCC) Plan for this facility?*

Loss History Information for this Facility*

No pollution related clean-ups or 3rd party claims at this facility in past 10 years

Pollution at facility in past 10 years, resolved with regulatory closure

Do you utilize a 3rd party Engineering firm to provide Compliance Management Services for this Facility?*

Are any of the individual underground storage tanks greater than 30,000 gallons in capacity or does the facility have more than 2,000,000 gallons in total aboveground storage tank capacity?*

Do any of the storage tanks contains ethanol or other non-petroleum based products?*

Are any storage tanks located at a marina or airport?*

After completing the facility questions, to add an additional facility, go to the top of the page on the right-hand side and select the **Add Additional Facility** button.

If you do not have another facility to add, choose **Next** to continue.

TANKSAFE

Q347162Q2019

AGENCY & PRODUCER

Agency: Westchester
Producer: Jane Doe

FACILITY

Jane Doe, Inc.

Add Additional Facility

BACK

NEXT

Rating






The rating page will reveal the **Effective Date** selected at the beginning of the new quote.

The Effective Date selected can range from the present date to seventy (75) days forward.

When the Effective Date is selected, the **Expiration Date** will indicate a one-year term.

Select the **Limits of Liability** using the drop-down box. Defense limits are separate from the aggregate limits. This is a system- filled field and will always equal the aggregate limit. AST/UST policy limits structure is different for the combined AST/UST policy. Limits are dedicated for the UST exposure and separately to the AST exposure. These dedicated limits are necessary to preserve capacity for financial assurance purposes. Defense limits are outside these dedicated limits and equal to the lesser of the aggregate limits selected. The Total Policy Aggregate Limit is the Aggregate Limit plus the Defense Limit.

The default **Broker Commission** is **Standard**. If **Net** is chosen, the commission will be 0%.

Effective Date :* 09/03/2019 		Expiration Date : 09/03/2020
LIMITS OF LIABILITY		
UST	AST	
\$1,000,000 	\$1,000,000 	Per Storage Tank Incident Limit of Liability (Claims and Remediation Costs)*
\$1,000,000 	\$1,000,000 	Aggregate Limit of Liability(Claims and Remediation Costs) for all Storage Tank Incidents*
\$2,000,000	Total Aggregate Limit (Exclusive of Defense Costs)	
\$1,000,000	Aggregate Limit of Liability for all Legal Defense Expenses for all Storage Tank Incidents	
\$3,000,000	Total Policy Aggregate Limit of Liability for all Storage Tank Incidents	
Broker Commission (%) *	<input checked="" type="radio"/> Standard <input type="radio"/> Net	
Broker License Number	<input type="text"/>	

After selecting your limits, the **Facility Questions** must be answered on the rating page to continue. The facility questions match the questions on the TankSafe application.

Note: Questions below are numbered as per page 2 of the Storage Tank Application.

8. Were all of the Applicant's or any other party to the proposed insurance's storage tanks new at the time of installation?	<input type="button" value="Yes"/>	<input type="button" value="No"/>	
9. Were any storage tanks included on the insured schedule installed more than thirty (30) years ago? (Twenty-five (25) years for tanks located in the state of Connecticut?)	<input type="button" value="Yes"/>	<input type="button" value="No"/>	
10. Are any of the Applicant's or any other party to the proposed insurance's storage tanks located within one (1) mile of a body of water? (If "Yes", please complete the Marina Questionnaire form as an attachment to this application.)	<input type="button" value="Yes"/>	<input type="button" value="No"/>	
11. Are any of the Applicant's or any other party to the proposed insurance's facilities located in the State of Florida?	<input type="button" value="Yes"/>	<input type="button" value="No"/>	
12. Are Single-Walled Storage Tanks (i.e., Bare Steel Tanks, Steel Tanks with Cathodic Protection, STIP ¾ Tanks or Tanks operating under ACT 100), with or without any form of tank lining, located at the Applicant's or any other party to the proposed insurance's facilities in the State of Florida? (Only applicable if Question 11. is answered "Yes").	<input type="button" value="Yes"/>	<input type="button" value="No"/>	<input type="button" value="N/A"/>
13. Within the past five (5) years has the Applicant purchased this type of insurance coverage? (If "Yes", please provide information regarding any such coverage and all available loss information.)	<input type="button" value="Yes"/>	<input type="button" value="No"/>	
14. Are there currently, or have there historically been, any hazardous, toxic, or regulated substances stored at any of the locations for which this application for insurance is being made other than these products: Gasoline, Diesel Fuel, Motor Oil, Fuel Oil, or Kerosene?	<input type="button" value="Yes"/>	<input type="button" value="No"/>	
15. Were any tanks ever removed or closed in placed at the location(s) where the scheduled tanks are currently located?	<input type="button" value="Yes"/>	<input type="button" value="No"/>	
15a. Will any scheduled storage tank(s) be removed, closed or upgraded at any of the facilities for which coverage is sought under this policy within the next eighteen (18) months?	<input type="button" value="Yes"/>	<input type="button" value="No"/>	
16. Does the Applicant and any other parties to the proposed insurance maintain a Spill Prevention and Counter Control Plan with regard to any	<input type="button" value="Yes"/>	<input type="button" value="No"/>	<input type="button" value="N/A"/>

After answering the questions, select **Next** to proceed.

Summary

The **Summary** page presents the information from the previous pages for review.

ACCOUNT & INSURED INFO
FACILITY INFO
RATING
SUMMARY
ISSUE

INSURED & POLICY INFO

Insured Info	Policy Info
Insured's Name Jane Doe Test	Effective Date 10/18/2019
Address 1 11575 Great Oaks Way	Expiration Date 10/18/2020
Address 2	Type Of Insurance AST/UST
City, State, Zip Code Alpharetta, GA 30009	SIC Code 5411
Phone # -	
Email Address -	

LIMITS OF LIABILITY

	UST	AST
Per Incident	\$1,000,000	\$1,000,000
Aggregate	\$1,000,000	\$1,000,000
Total Aggregate (Exclusive of Defense Costs)	\$2,000,000	
Defense Limit	\$1,000,000	
Total Policy Aggregate Limit of Liability for all Storage Tank Incidents	\$3,000,000	
Is the Insured purchasing this coverage to satisfy financial responsibility requirements?	Yes	
Is Loading and Unloading coverage to be included on the policy?	Yes	

By clicking on the appropriate chevron arrows, you can review the **Facility, Tank, Additional Insured** and **Underwriting** and **Application Questions** details.

APPLICATION PREVIEW

Total Number of Facilities Submitted for Coverage : 1

> View Facility Details

Number Of ASTs Submitted for Coverage : 1

v View AST Details

Locatio...	Tank ID	Installati...	Retroac...	Second...	Piping S...	Auto-Ov...	Tank C...	Tank C...
Jane Do...	900	8/5/2019	8/5/2019	Imperm...	Yes	Yes	2000	Unleaded

Number Of USTs Submitted for Coverage : 1

v View UST Details

Location Na...	Tank ID	Installation...	Retroactive...	Tank Const...	Tank Capa...	Tank Content
Jane Doe Inc.	3	8/5/2019	8/5/2019	Double Wall...	12000	Unleaded

Are Additional Insureds to be listed on the Policy : Yes

> View Additional Insured Details

Underwriting and Application Questions

> View Underwriting & Application Question Details

If the submission is not acceptable for coverage or requires further review, you will receive a message in the summary section under **Underwriter Referrals/Declination**. The submission will then refer to underwriting.

UNDERWRITER REFERRALS/DECLINATION

R019 - Submission has been referred due to Non-petroleum tank contents.

TANKSAFE

Q346699Q2019

AGENCY & PRODUCER

Agency: Westchester
Producer: Jane Doe

This quote has been referred to Underwriting for further review. You will receive notification when processed. A quote will be offered if the account meets underwriting guidelines.

Additionally, a message will appear on the right side of the screen to indicate an underwriting referral.

Once the submission has been reviewed by underwriting, a system message will be sent to the assigned user and generate in the **Notifications** section of the dashboard – see pages 4, Notifications, of this document.

After confirming the information for the quote and reviewing the terms, check the box **I agree**.

The producer warrants and represents to the insurer that the information entered into the TankSafe® Database (the "Database") is true and correct, and that the producer has exercised its best efforts in verifying the accuracy of the information. The producer acknowledges that the information entered into the Database is material to the decision of the insurance company to issue a policy, and that the issuance of a policy by the insurer is in reliance upon the sufficiency and accuracy of the information entered into the Database by the producer.

I agree

BACK
Go To Top

You will receive three deductible **Quote Options** showing the premium of that deductible option under Total Premium.

Some states have taxes, which will appear in the quote options under Taxes and will be part of the Total Premium.

To Generate a Quote: Select the appropriate **Quote Options** by checking the associated boxes.

<u>QUOTE OPTIONS :</u>					
Please select up to 3 options to show on your quote.					
	Deductible	Base Premium	TRIA	Taxes	Total Premium
<input checked="" type="checkbox"/>	\$5,000	\$489	\$0	NA	\$489.00
<input checked="" type="checkbox"/>	\$10,000	\$416	\$0	NA	\$416.00
<input checked="" type="checkbox"/>	\$25,000	\$350	\$0	NA	\$350.00

After selecting your Quote Options, two **Generate Quote** options will appear in a box, in the upper right corner.

- Generate Quote
- Generate Quote with Forms

TANKSAFE

Q346866Q2019

AGENCY & PRODUCER

Agency: Westchester
 Producer: RRTEST02

Generate Quote

Generate Quote with Forms

Generate Application Form

Please see Attachments in the lower left corner for account documents

Save and Exit

The **Generate Quote** option is a quote letter and the **Generate Quote with Forms** option is a quote with specimen forms.

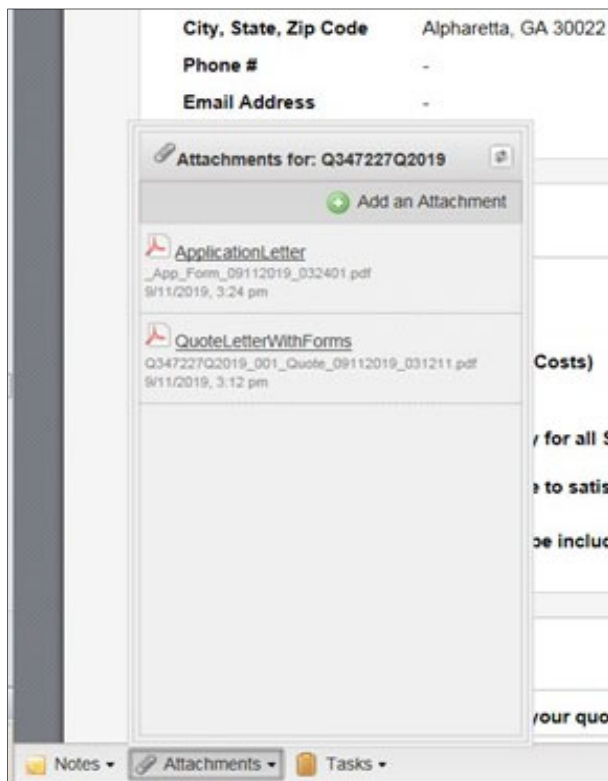
After selecting one of the Quote Options, the generated quote will be available at the bottom left corner in Attachments.


By selecting Attachments, the folder will open to allow you to select and view your generated quote.



To Generate an Application Form: Select the **Generate Application Form** button and it will be available in **Attachments**.

Within the **Attachments** folder, is the option to add underwriting information by selecting Add an Attachment and uploading the data.



<p>Policy Info</p> <p>Effective Date 09/11/2019 Expiration Date 09/11/2020 Type Of Insurance AST/UST IC Code 5012</p>		<p>TANKSAFE</p> <p>Q347227Q2019</p> <p>AGENCY & PRODUCER</p> <p>Agency: Westchester Producer: John Doe</p> <p>Generate Quote Generate Quote with Forms Generate Application Form Proceed to Issue</p> <p>Please see Attachments in the lower left corner for account documents</p> <p> Save and Exit</p>																								
<table border="1"> <thead> <tr> <th></th> <th>UST</th> <th>AST</th> </tr> </thead> <tbody> <tr> <td></td> <td>\$1,000,000</td> <td>\$1,000,000</td> </tr> <tr> <td></td> <td>\$1,000,000</td> <td>\$1,000,000</td> </tr> <tr> <td></td> <td>\$2,000,000</td> <td></td> </tr> <tr> <td></td> <td>\$1,000,000</td> <td></td> </tr> <tr> <td>ents</td> <td>\$3,000,000</td> <td></td> </tr> <tr> <td>Yes</td> <td></td> <td></td> </tr> <tr> <td>Yes</td> <td></td> <td></td> </tr> </tbody> </table>			UST	AST		\$1,000,000	\$1,000,000		\$1,000,000	\$1,000,000		\$2,000,000			\$1,000,000		ents	\$3,000,000		Yes			Yes			
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Yes																										
Yes																										

If you Need to Leave the Quote Record:
 Make sure to select **Save and Exit** on the right-hand side of the screen to save data and not lock the record.



Issue

TANKSAFE

Q346922Q2019

AGENCY & PRODUCER

Agency: Westchester
 Producer: Jane Doe

Generate Quote

Generate Quote with Forms

Generate Application Form

Proceed to Issue

Please see Attachments in the lower left corner for account documents

Save and Exit

To proceed with binding and policy issuance, select the **Proceed to Issue** button on the summary page.



Choose a **Deductible** option to Bind.

BIND OPTIONS :

Please select Deductible option to Bind

	Deductible	Base Premium	TRIA	Taxes	Total Premium
<input checked="" type="checkbox"/>	\$5,000	\$489	\$0	NA	\$489.00
<input type="checkbox"/>	\$10,000	\$416	\$0	NA	\$416.00
<input type="checkbox"/>	\$25,000	\$350	\$0	NA	\$350.00



Upload a current insured signed and dated application by choosing **Upload Signed Application**.

SIGNED AND DATED APPLICATION

Please Upload a current insured signed and dated application prior to binding coverage. Please note:

- File size should not exceed 30MB
- The following file types are allowed: pdf, jpg, doc, docx, xls, xlsx

Upload Signed Application

Select **Browse** to choose the file path. Then input a **File Name** such as 'Application'.

Upload

File Path*

File Name*

Once the application has been uploaded, you will be able to bind by selecting the **Issue** button.

TANKSAFE

Quote Number: Q346922Q2019

AGENCY & PRODUCER

Agency: Westchester

Producer: Jane Doe

Jane Doe Test

Commission: 17.5%

Company: ACE American Insurance Company

Admitted Status: Admitted

ISSUE

Please see Attachments in the lower left corner for account

After selecting the **Issue** button, a message in the lower right side will confirm policy issuance.

POLICY PERIOD

Effective Date : 07/31/2019
Expiration Date : 07/31/2020

BIND OPTIONS :

Please select Deductible option to Bind

Deductible	Base Premium	TRIA	Taxes	Total Premium
<input checked="" type="checkbox"/> \$5,000	\$350	\$0	NA	\$350.00

SIGNED AND DATED APPLICATION

Document:

TANKSAFE

Policy Number: G28346529 001

AGENCY & PRODUCER

Agency: Westchester
Producer: RRTEST02
Tank You, Next
Commission: 17.5%

Company: ACE American Insurance Company
Admitted Status: Admitted

Please see Attachments in the lower left corner for account documents

Go to Dashboard Home
Go to TransACT

Your policy has been issued!
Thank you for making Westchester your market of choice.

GENERATE POLICY DOCUMENTS
GENERATE CERTIFICATES

BIND OPTIONS :

Please select Deductible option to Bind

Attachments for: Q347227Q2019

Attachment Name	File Name	Time	TRIA
PolicyPack	G28349166_001_Policy Pack_09112019_033613.pdf	9/11/2019, 3:36 pm	\$0
Application	100 Acre Wood Application.docx	9/11/2019, 3:34 pm	\$0
Application letter	_App_Form_09112019_032401.pdf	9/11/2019, 3:24 pm	\$0
QuoteLetterWithForms	Q347227Q2019_001_Quote_09112019_031211.pdf	9/11/2019, 3:12 pm	ON

Notes Attachments Tasks

To access your generated documents, go to the lower left corner and click on **Attachments**.

Renewals

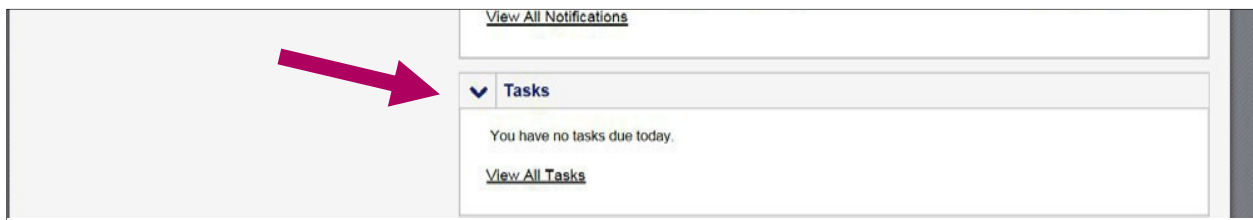
Renewals assigned to your broker code will generate seventy-five (75) days prior to the effective date. Renewal issuance is **Not Automatic**. Every renewal must be submitted, reviewed, and bound.

All policy information will carry forward from the current term to the renewal. Please review the submission accordingly at each renewal as information may change at renewal.

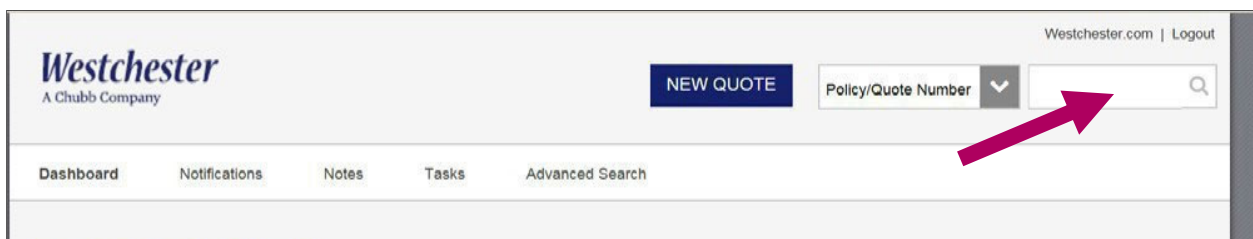
Any mid-terms change made to a current Fast Track policy will reflect on the renewal. Any mid-term changes made to an expiring Solutions policy must be updated manually on the renewal.

In addition to the seventy-five (75) days prior to the effective date, there is a four (4) day grace period following the expiration date to bind the renewal. On the 5th day, the renewal quote will expire. Expired renewals will not be reinstated. The only option to bind coverage on a renewal that has expired is to enter the account as a new submission.

Your system-generated renewal should appear automatically under Tasks or View All Task, by selecting View All Tasks:



If your renewal submission is not available under **Tasks**, search for a renewal policy by entering the **Policy Number** or **Client Name** in the **Search** box located at the top right corner; click the **Magnifying Glass** icon or press **Enter**.



Your search will appear under **Search Results**.

Westchester
A Chubb Company

NEW QUOTE Policy/Quote Number

Dashboard Notifications Notes Tasks **Advanced Search**

[View Policy \(Jane Doe \)](#) [View Policy Details](#) [View Client Information](#)

Search for Policies, Quotes, and Clients

I'm looking for:

All Policies and Quotes All Clients **Specific Policies and Quotes** ✓ Specific Clients

Search by: Policy/quote numbe

Search in: All agent Include previous terms Show only deleted policies

Search

Search Results

Policy/Quote #	Insured Name	Line	Eff Date	Exp Date	Status	Locked
Q28346803 002	Jane.Don.Tesi	CarrierTa...	8/5/2020	8/5/2021	InForce	false

Click on the **Insured Name** of the renewal.

On the next screen select **Carrier TankSafe**.

[View Policy Details](#) [View Client Information](#)

Client ID: 458428 **Address:** 11575 Great Oaks Way
Primary Contact: Alpharetta, GA 30009

[Update Client Details](#)

Portfolios

No portfolios exist for this client.
[Add a Portfolio](#)

All Policies and Quotes

Product	Description	Policy Status	Current Transaction	Effective Date	Expiration Date
CarrierTankSafe		InForce	Renew-Approved	8/5/2020	8/5/2021

[Start a New Quote](#)

After selecting **Carrier TankSafe**, you will advance into the renewal record at the **Account & Insured Info** page.

Review the information, make any necessary changes on each page and select **Next** to continue.

If you Need to Leave the Quote Record:

Make sure to select **Save and Exit** on the right-hand side of the screen to save data and not lock the record.