

MyMcGowan

McGowan & Company's Online Quoting Site

How To Use MyMcGowan

To Access the Login Page:

1. Visit <http://my.mcgowaninsurance.com> OR
2. Visit www.mcgowaninsurance.com and click on the "MyMcGowan" button (located in the lower left section of our site).

To Enroll (Even if Current Broker):

1. Click on the "New Broker Click Here" link under the "Welcome New Brokers" Heading.
2. Hit "Next" on the page that appears.
3. You will be presented with an Agency Questionnaire. Please fill out the questionnaire and select an individual username and password.
Please Note: E-mails are sent from MyMcGowan to the e-mail address that is specified on this page. If you'd like to select an agency-wide username and password, we suggest using an agency-wide e-mail address. (For example: info@yourcompany.com or mymcgowan@yourcompany.com for all correspondence to go to)
4. Once you complete the questionnaire, hit the "Submit" button at the bottom of the page.
5. Print out the PDFs on this page and fax them to McGowan & Company so we may update our files. We will then review your broker file and grant you access to the site.
6. Once you receive an e-mail from MyMcGowan stating that you can now log in, go back to <http://my.mcgowaninsurance.com>.
7. Log into the site using the username and password that you selected while completing the Broker Questionnaire.
8. You're now ready to start submitting business.

Thank you for Using MyMcGowan!

Our Online Site Allows You To:

- Submit new business applications for Umbrella and D&O Liability for condominiums and other community associations.
- Bind applications submitted via the site
- Received immediate status updates on business submitted via the site in your "To Do" list
- Request endorsements to any in-force policy
- Request loss runs on any in-force policy
- Download current application forms for all programs
- Obtain articles and program-specific updates that are not available on our home page

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Options Available on MyMcGowan Home Page:

1. New Business Folder / Tab - links to all of our online applications (not all programs are available yet).
2. Endorsement Request / My Clients Tab - links to a form where you can submit endorsement requests and loss-run requests.
3. My Profile Tab - this is your broker's current information: address, phone number, etc. as well as your username, password, and e-mail address. You can advise us of any changed by updating the form and hitting the "Submit" button at the bottom of the screen.
4. To Do List - your "queue" of items in progress: applications submitted, endorsement requests submitted, indications and quotes pending, bind requests pending. This is how you can keep track of what you need to submit to McGowan and what you're waiting to receive from McGowan.

To Submit New Business Applications:

1. Click on the "New Business" Folder or Tab.
2. Select the application type that you'd like to submit, based on the program and exposure class.
3. Select whether you'd like to obtain a QUOTE (bindable) or an INDICATION (not bindable). Your choice will determine how much of the online application will need to be completed.

Please Note: If you choose to receive a QUOTE, you will be required to complete every page and every question on the application (except for the Signature Page).

4. Start completing the application!!!
All questions that are mandatory in order to progress through the application are marked with a red asterisk (*).

If you need to leave the application for any reason, in order to retain the information you have already supplied you will need to hit the "Save and Exit" button at the bottom of the screen. The application will show up in your "To Do" list with a Status of "In Progress" and an Action type of "Continue." To continue completing the application, merely click on the "Continue" link, which will take you back to the beginning of your application.

5. Once you've completed all of the mandatory questions, you will receive a confirmation page.
You will receive a PDF version of our application, fully completed with information you provided through the website application. Please Save this version to your computer and/or print it out, as this is the only opportunity you will have to do so!

Please Note: Any revisions to the application (i.e. at the time of binding) will generate a new, updated PDF that you should save and/or print out for your records.

If you'd like to submit another application of the same type (another umbrella or another D&O), click the "Submit Another Application" button. If you'd like to complete another application for the same insured, but for another coverage type, click the "Get D&O (Umbrella) Indication (Quote)" button; this will carry some information for the insured on to this additional application.

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To Bind New Business:

1. Go to your "To Do" list.
2. Find the client and application that you'd like to bind.
3. Click on the "Bind" link in the Action column.
4. Choose the limit and effective date (No backdating is permitted) that you would like to bind, and then click the "Bind" button.
5. You will be taken through the application to complete any sections of the application that were not completed prior, including the Signature Page.
6. The Signature Page
 - a. You have the option for obtaining either an E-Signature (electronic) or a Wet Signature (signed by hand) for the Umbrella (D&O is WET SIGNATURE ONLY at this time). If you select E-Signature, you will type your name in as the Agent (thereby "signing" the application) and supply us with the name and e-mail address of the insured representative. An e-mail will go out to the insured (CC to you) with a link where they can "sign" the application electronically).
 - b. If you select "Wet" signature, you will print out the PDF supplied at the end of the binding process and forward it to the insured for review and signature (in the traditional manner).
7. Once the signature is received (either electronically or manually), you will receive an e-mail from MyMcGowan stating that your binder and invoice (D&O) OR invoice and policy (Umbrella) are attached.

To Request an Endorsement OR Loss Runs:

1. Click on the "Endorsement Request" folder or tab.
2. Fill in the insured name, policy type, effective date of change, policy number, and change requested.
3. Please be explicit regarding the change:
 - a. If mailing address change, supply complete address;
 - b. If change of carrier, please provide carrier name, effective dates, and policy number;
 - c. If this change affects multiple policies or policy types, please note this in the box;
 - d. Please note that **significant changes** in exposure (i.e. addition of units, change in coverage request, locations, pools, autos, deletion of locations, etc.) may result in an additional premium charge.