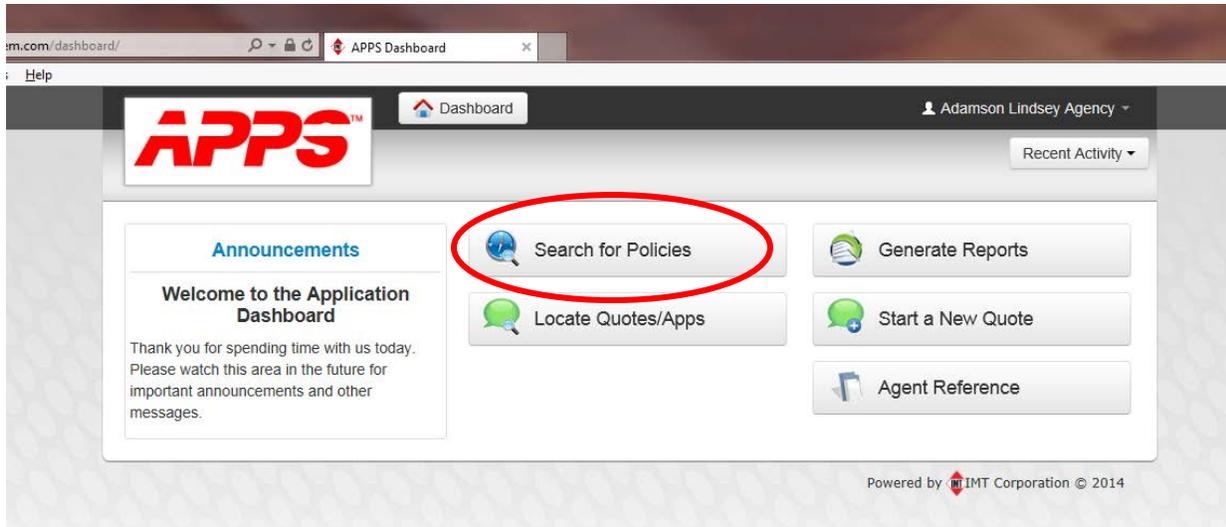


Submitting Changes to American Mutual

1. **American Mutual is changing their process for changes to existing policies and now requires all changes to be submitted through APPS Online.** From the main screen of APPS Online select Search for Policies.



- Search for the customer you wish to make a change on and press "Search". Please note if you do not enter anything in the name or policy number fields and just press "Search" all of the policies for the agency will appear. You will notice that if there are two people on the policy, depending on how you did the search, the policy number may appear more than once as shown below. Just select the "Policy Number" you want to make a change on.

The screenshot shows a web browser window with the URL <https://www.apps-system.com/navigator/search/?csrfmiddlewaretoken=...>. The page header includes the APPS logo and a welcome message for Adamson Lindsey at ADAMSON-LINDSEY AGENCY, INC., representing the American Mutual Insurance Association.

The main heading is "Search for a customer, policy, or claim". Below it, it states "Displaying 9 possible matches below". The search criteria are as follows:

- Last / Business Name: Schmidt
- First Name: (empty)
- Policy Number: (empty)
- Claim Number: (empty)
- Effective Date Range: 07/03/2012 to (empty)
- Display Claims?

There are "Search" and "Clear" buttons. The "Search" button is circled in red.

Below the search criteria, it says "Displaying 9 possible matches" and shows a table of results:

Name	Policy Number	Policy Type	
MARK SCHMIDT	2111186	FARMATE	PO BOX 51
NICOLE SCHMIDT	2111186	FARMATE	PO BOX 51
MICHAEL SCHMIDT	3006139	FARMATE	1603 TIME
MARY P SCHMIDT	3006139	FARMATE	1603 TIME
DONALD L SCHMIDT	3206147	FARMATE	1585 215'
% MICHAEL SCHMIDT	2011218	FARMATE	1603 TIME
% MIKE SCHMIDT	3011287	FARMATE	1603 TIME
MICHAEL SCHMIDT	1210727	HG SPECIAL FORM (HG3)	1603 TIME
MARY P SCHMIDT	1210727	HG SPECIAL FORM (HG3)	1603 TIME

The "Policy Number" column in the table is circled in red, highlighting the value 2111186 for the first two entries.

At the bottom left is the logo for IMT COMPUTER SERVICES CO. At the bottom right, there is a footer with the website URL www.apps-system.com, links for "contact us" and "navigator home", and a copyright notice: "Copyright © 2014 The IMT Group".

- From the main screen of the policy you will see in the lower right hand corner a change request button. Click on "Change Request".

The screenshot shows the APPS Online interface for a policy. The browser address bar displays <https://www.apps-system.com/navigator/1348041/policy/776>. The user is logged in as [agency]. The page header includes the APPS logo and the text "Welcome Adamson Lindsey" and "ADAMSON LINDSEY AGENCY, INC. Representing American Mutual Insurance Association, Grand Mound, IA". The user's name "MARK SCHMIDT" and policy number "Policy 2111186" are displayed. A navigation menu includes "All Info", "Policy", "Claims", "Premium", and "Attachments". A table lists policy transactions:

Policy #	Policy Type	Transaction	Effective	Premium	Dec
2111186	FARMATE	Anniversary	10/15/2013	\$305.58	

Below the table, there is a "Show all policy history" link. A detailed policy information box contains the following data:

- Policy: 2111186**
- Inforce: \$133,950
- Term Premium: \$305.58
- Billed Premium: \$305.58
- Bill Mode: Direct
- Pay Plan: Annual
- Transaction: Anniversary
- Trans Effective: 10/15/2013
- Trans Processed: 11/26/2013
- Effective: 10/15/2013 to 10/15/2014
- Term Effective: 10/15/2012 to 10/15/2015
- Bill To: POLICY HOLDER
- Agency: ADAMSON-LINDSEY AGENCY, INC.
- Liability Co: GRINNELL MUTUAL REINSURANCE COMPANY - GRINNELL, IOWA
- Deductible: \$1,000 DEDUCTIBLE APPLIES TO THIS COVERAGE
- IRPM:

The "Policy Detail" section on the left includes expandable options for Risk Locations, Property Coverage, Liability Coverage, and Forms. The right-hand sidebar contains a "Policy 2111186" summary, "Policy Print" button, "Include Dec" checkbox, "Print Policy" button, "Copy to Quote" button, and a "Change Request" button which is circled in red.

4. In the Change form it will generate the form below. Simply select the "Effective Date" of the change and type in the changes required.

om/navigator/1348041/change-reque APPS Online • Navigator • Cus... APPS Online • Navigator • ... X

help

IMT COMPUTER SERVICES CO. Dashboard Adamson Lindsey Agency

To: ammutual@gmtel.net

Policy Number: 2111186

Insured Name: Mark Schmidt, Nicole Schmidt

Effective Date: 07/03/2014

Request:

1. Increase coverage \$20,000.
2. Add Equipment Breakdown Class B.
3. Change Mortgagee to:
First Trust & Savings Bank
PO Box 200
Grand Mound, IA 52751

Download/Print Change Request

Signed Change Request:

Select file

Other Attachments:

Select file

Send Request Reset

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5. Once you have the change ready you have several options.
- You can simply send the request, in which case an email will be generated and sent to ammutual@gmtel.net and the person submitting the request (in this case Adamson Lindsey Agency's email). **Please note that American Mutual no longer requires signed changes unless you are cancelling a policy or removing an insured from a policy.**
 - You can "Download/Print Change Request" to have the customer and/or agent sign for your own records. Again we don't require a signature unless you are cancelling or removing an insured but if you do want to attach the signed change request you can do that by pressing "Select File" below the "Signed Change Request".
 - You can also attach a Blanket Inventory, pictures, or a signed endorsement if needed under "Other Attachments".

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help

Dashboard Adamson Lindsey Agency

IMT COMPUTER SERVICES CO.

To: ammutual@gmtel.net

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Grand Mound, IA 52751

Download/Print Change Request

Signed Change Request:

Select file

Other Attachments:

Select file

Send Request Reset

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6. This is an example of the email that will be sent to both the Agent and American Mutual.

(211186) Change Request - Message (HTML)

FILE MESSAGE McAfee E-mail Scan

Ignore Delete Reply Reply All Forward More Meeting

Junk Delete

Adamson-Linds... To Manager Done Create New

Team Email

Reply & Delete

Quick Steps

Move OneNote Actions

Mark Unread Categorize Follow Up

Tags

Translate Relat Select Editing

Thu 7/3/2014 12:31 PM

 noreply@imtapps.com

(211186) Change Request

To ammutual@gmtel.net; baagency@gmtel.net

Change Request

Company	Agency	Insured
American Mutual Insurance Association	Adamson-Lindsey Agency, Inc.	Mark Schmidt
516 Smith Street	Adamson Lindsey Agency	Nicole Schmidt
Grand Mound, IA	516 Smith St.	Po Box 501
563-847-2000	Grand Mound, IA	Dewitt, IA 52742
	563-847-2000	

Policy Info

Policy period from Oct. 15, 2013 **through** Oct. 15, 2014

Policy Number: [211186](#)

Requested Change

Change Request Date July 3, 2014

This is only a test, do not change policy.

1. Increase coverage \$20,000.
2. Add Equipment Breakdown Class B.
3. Change Mortgagee to:
First Trust & Savings Bank'
PO Box 200
Grand Mound, IA 52751

 See more about noreply@imtapps.com.