



Insurance for Professional Service Firms

900 Route 9 North, Ste. 503, P.O. Box 39, Woodbridge, NJ 07095-1003

Toll-free: (800) 272-6771

Fax: (732) 634-5379

InScope Instructions

To access InScope, go to: www.marquisagency.com

Click the "LOGIN" button or "Clients Only" at the top of the screen.

Click on the hyperlink that reads "Click Here for Client Access 24/7/365"

1. Enter your **Login Name** and **Password**.
2. Click on your insured name.
3. You will see a listing of policies that are related to your firm.
4. If you click on a policy it will show the description: Policy Number, CSR, Company the policy is written through, Effective/Expiration dates and Premium.
5. At the side Menu: Processing Certificates and Auto ID cards will be the most used tools on the InScope site. With these, **you can create your own certificates and send directly to your clients with the click of a mouse** (Certificates can be faxed or emailed for your client's convenience).
 - a. Processing a Certificate: Locate and click on the certificate template labeled InScope. A choice will come up to Add Holder. If this is a holder that has been issued a certificate before, entering the zip code can help locate the holder. If not then click on Add New Holder. Enter in the correct information in the boxes. See page 2 Example. Then click Add This Holder. You will then have the ability to either fax, email or view and print the certificate.

*Only the InScope Template is to be used. Use of any other template will generate an incorrect certificate.

NOTE: If at anytime during InScope usage you receive a message that reads "We are unable to process your request as this Certificate is currently queued." Please call Marquis Agency immediately to reset your user account.

EXAMPLE

| | |
|-----------|--|
| Name | <input type="text" value="Certificate Holder Name"/> |
| | <input type="text" value="Project name &/or No."/> |
| Attn | <input type="text"/> |
| Address | <input type="text"/> |
| Address 2 | <input type="text" value="Field must remain empty"/> |
| City | <input type="text"/> |
| | St <input type="text" value="NJ"/> |
| | Zip <input type="text"/> |

Please note this information used to appear in the Description of Operations box. Due to space limitations of this box, the Project Name and Number may not fit. You may only be able to fit the Project Number. If your client requires both, you must call the Marquis Agency to issue the certificate.

Description of Operations
Pre-filled by Marquis Agency

Cancellation of described policies 30 days written notice
Holder is an Additional Insured? No

If your firm has increased the limit of liability during the policy year or has added a Specific Additional Limit endorsement, you must contact us to create a new certificate of insurance template.

- b. Processing Auto ID Cards: Click on the vehicle(s) requesting the ID card. Once the selection(s) is made click Next. Then choose either fax, email or view and print the ID card and click Next.

ABOUT INSCOPE

MY POLICIES

The My Policies page provides a list of the Insurance Policies you have with The Marquis Agency.

To view policy information, click the button to the left of the policy type.

The collection of options that occupy the left hand portion of the page is called the Navigation Bar. The Navigation Bar provides the areas of the policy that you have to access to. The Navigation Bar works in a couple of ways.

1. If you choose one of the options on the Navigation Bar before choosing a policy, the Navigation Bar becomes account specific, or displays the information (e.g. Claims) for all policies.
2. If you select a policy first and then choose one of the options from the Navigation Bar, the Navigation Bar will provide the option of viewing the information (e.g. Claims) fro all policies or just the policy you selected.

My Policies – Displays a list of your active policies.

Coverage Summary – Displays Coverage Information for a selected policy **only** if there is a standard application attached to the policy. **Professional Liability Policies do not have standard applications therefore there is no coverage summary available.**

Certificates of Insurance – Allows you to view, print, fax, or email an existing certificate and add new certificate holders.

Auto ID Cards – Allows you to view, print, fax or email Auto Id Cards.

Agents Info. - A summary of the Agency address and phone number information

Send a Message - This allows you to go directly to email in the event you need to send a message to your agent.

CERTIFICATES OF INSURANCE

The 'Certificates' table displays a list of the certificates issued for your Account.

Certificates are related to an entire account and not a single policy. Whether the Certificates are chosen from a specific policy, or from the MY Policies page, all Certificates for the account are displayed.

- **Date Created** – The date the Certificate was created.
- **Type** – represents the type of Certificate it is, Professional Liability, General Liability, etc.

- **Title** – A title is given to each certificate that is created, Refer to the title when talking to your agent.

You can view holders for the Certificate displayed. To view holders for a certificate, click on the button. A list of holders for that certificate will be displayed.

Click the Print button on the **toolbar** to get a list of the certificates for the account.

CERTIFICATE NOTES

1. **Do not show the Certificate Holder as an Additional Insured with respect to Professional Liability**
2. **A request for a Waiver of Subrogation must be forwarded to your agent.**
3. **If you have a request for Insurance coverage that you do not carry, a request for limits of insurance that exceeds the limits on your current policy or the Additional Insured wording appears strange or new, or you are at any time uncomfortable with a request, please do not hesitate to contact us**
4. **Use of the Description Box on the certificate has been blocked and additional language can not be inserted. The Marquis Agency has pre-filled this box with standard insurance language.**
5. **If you click on 'add holder' it will create a new certificate, whether you have made any changes or not.**
6. **You may not change a Certificate Holder's name or address once that holder has been added. If you need to make a change, you must create a new certificate.**

AUTO ID CARDS

The Auto ID card 'vehicles' page allows you to select the vehicles you wish to print Auto ID Cards for.

Click the button to the left for each vehicle you would like to print an Auto Id Card for. Once a vehicle has been selected the button displays red selection arrows.

Click the **Select All** button to print an Auto Id Card fro all vehicles in the schedule. All vehicles will appear in the lower frame and the buttons will display red arrows.

Click the individual **Remove** button for any vehicle you want to remove from the selection box, Auto Id cards will not print for these vehicles.

Click the **Remove All** button if you wish to remove all vehicles from the selection box and start over with your selections.

Click the **Next** button when your selections have been made and you are ready to fax the cards.