

ICWGROUP

Snap[®] 

PRODUCER GUIDE

Step-by-step instructions on using Snap[®],
our Agency Underwriting portal for
Workers' Compensation.


Insurance Companies



Welcome to the Snap Producer Guide

Say Hello to Snap – ICW Group’s web-based portal for Workers’ Compensation. Snap is a highly-intuitive, web-based tool that automatically uploads applications, speeds the quoting process and significantly reduces your workload.

You can view and manage applications any time you want, and you can **submit applications up to 120 calendar days** in advance of the effective date.

With Snap Instant Quote (IQ) for small business, the quoting process is automated for submissions that meet eligibility requirements on selected class codes.

- Manual premiums as low as \$1,500
- Insureds with single-state operations in CA, FL, GA, IA, IL, IN, KY, MD, MI, MN, MO, NC, NJ, NV, NY – 7/1/24 effective dates and later, OK, PA, SC, TN, TX, VA or WI

Snap is easy to use. You’ll be up and running in no time. Integrated with email, Snap keeps you in-the-know and liberates you from the office. You spend less time filling out applications and more time servicing your clients.

Revision 05/2025

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Technical Information

System Requirements

Snap is supported in the following system configurations.

- Microsoft Windows 10 or 11
- Screen resolution: Minimum 1024 x 768 pixels (1280 x 1024 pixels recommended)
- Browser: Latest versions of Google Chrome (**preferred**), Mozilla Firefox.
- Set browser cache to “Automatically Check for Newer Versions of Stored Pages”

For technical issues

For help with technical issues, contact your agency’s Snap Administrator or your ICW Group Business Development Underwriter.

Helpful Snap materials

Find everything fast in Agent Portal

You'll find Snap guides, how-to videos and more in Agent Portal at <https://agentportal.icwgroup.com/login>

- **Snap Producer Guide:** Learn the Snap interface and steps for creating, submitting and binding applications.
- **Snap Administrator Guide:** Set up and maintain your agency's users in Snap.
- **Snap Upload Guide:** Save time and instantly upload applications using Applied Systems Transformation Station, AMS/Vertafore Transact Now, or upload straight from an ACORD PDF form.

Training videos

You'll also find topic-specific videos in Agent Portal at <https://agentportal.icwgroup.com/login>. These cover the most common Snap functions and features, and are listed with indexed links for your convenience.

- Navigation Overview
- Search and filter
- Collaboration Tools
- Prequalify or Check Clearance for a Submission
- Snap's Instant Quote (IQ)
- Uploading Submissions
- Updating Renewals

Snap Instant Quote Small Business Class Code reference

The Instant Quote (IQ) Class Codes reference comes as an Excel file and is available Agent Portal. You can easily search and sort Instant Quote class codes to quickly identify opportunities to grow your business. See Agent Portal for reference guides <https://agentportal.icwgroup.com/login>

Help Online in Snap

While in Snap, it's easy to get online help.

1. Simply click the **Help** icon in the top header area.



2. Select **Online Help** to view topics, search for a particular item or view tutorials.

Getting Started

Setting up your user account for the first time

Your agency administrator will initiate setting up your account. You'll then receive a registration email. Simply follow the steps provided in the email to create your password for the first time!

Reset your password

There may be occasions you forget your password or you may want to change it. It's easy with Snap!

1. From the Agent Portal screen, click **Forgot Password**.
2. Enter your **email address**. This is your primary email address for your agency.
3. Click Email Me The Link. You'll immediately receive an email with a link to create your new password.
4. Check your email for a message confirming your password was changed.

Logging in

To login at any time: <https://agentportal.icwgroup.com/login>

Quick Structure overview

Snap has three main workspace areas:

- Snap homepage (displayed on login)
- Submissions page
- Collaboration tool

Snap homepage overview

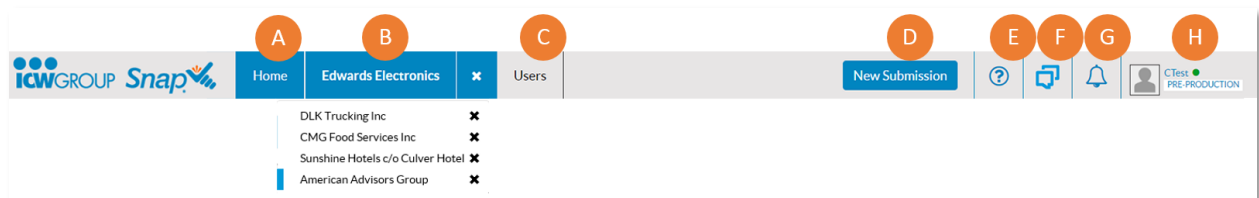
When you log into Snap, the Homepage is displayed, allowing you to access submissions, view recent activity and check possible tasks assigned to you. It consists of:

- A. The top navigation
- B. Widgets area
- C. Collaboration tool

Top Navigation Bar

At the top of the Home page is the top navigation bar (see the following illustration). It stays at the top of the screen, no matter where you navigate, and contains the following:

- A. **Home button** – Allows you to quickly return to the Home page from within a submission.
- B. **Submissions drop down** – Use to display and navigate to opened submissions.
- C. **Users** – Only shown for Agency Administrators to manage Snap access for your Agency.
- D. **New Submission button** – Creates new submissions.
- E. **Help icon** – Accesses Snap’s online help manual.
- F. **Chat icon** – To be enabled in a future release.
- G. **Notifications icon** – Alerts you to submissions that have new actions taken or needed.
- H. **Profile Settings** – Used to change your password or personal information, and to log out of Snap.



Home page widgets

The Homepage also contains three customizable widgets: Submissions widget, Tasks widget and Recent Activity widget. You can move and resize the widgets to create a layout that matches the way you want to work. Snap remembers the configuration and will displays the way you set your widgets the next time you log in.

Note: Use the vertical and horizontal scroll bars in each widget to see the all information.

- **Submissions widget** is a list of all your submissions based on the Active filter shown in the widget’s title bar.
- **Recent Activity widget** contains a list of any activity on a submission based on the Active filter shown in the widget’s title bar.
- **Tasks widget** contains a list of Tasks assigned by or to you.

Submissions widget

The Submissions widget displays the status of your submissions. It consists of the Submissions widget title bar, Workspace and Paging buttons. (See following illustration.)

Insured	Account Name	Agency	Submission	Effective	Status	Premium	Underwriter	Assigned To	Received Date	
FLORIDA BOTTLING INC	FLORIDA BOTTLING INC	McGriff Insurance Services, Inc.	564640	12/24/2015	Returned	\$0	Sue Armellino	Christine Bruning	11/25/2014	>
Personal Touch Lawn Care Inc	Personal Touch Lawn Care Inc	Tanner, Ballew and Maloof, Inc.	573862	02/10/2016	Returned	\$0	Doris Reilly	Doris Reilly	01/13/2015	>
Engen Enterprises ACORD eff 7-1	Engen Enterprises ACORD eff 7-1	All Risks Ltd - Texas		07/01/2015	Returned	\$0	Gina Douglas			>
Doering Landscape Co	Doering Landscape Co	Corkill Insurance	600737	06/03/2015	Returned	\$37,382	Angie Watson	Jori Field	04/23/2015	>
DLK Trucking Inc	DLK Trucking Inc	MarketScout Corporation		07/01/2015	Returned	\$0	Gina Douglas			>
Priority Parking Service	Priority Parking Service	Non-appointed Agent - West Region	605855	08/15/2015	Returned	\$0	Jana Reznicek	Jana Reznicek	05/13/2015	>
American Advisors Group	American Advisors Group	Professional Insurance	606166	08/01/2015	Returned	\$0	Eka Georgieva	Christine Iloimin	05/14/2015	>
Above & Beyond Landscaping LLC	Above & Beyond Landscaping LLC	CAL Risk Management	606920	08/03/2015	Returned	\$0	Crystal Gooding	Tina Coutts	05/20/2015	>
Omnilife USA Inc.	Omnilife USA Inc.	MarketScout Corporation		07/01/2015	Returned	\$0	Raeshel Parker			>
Sunshine Hotels c/o Culver Hotel	Sunshine Hotels c/o Culver Hotel	Edgewood Partners Insurance Center	607651	08/01/2015	Returned	\$0	Michael Engell	Michael Engell	05/22/2015	>
United California Freight Solutions	United California Freight Solutions	Non-appointed Agent - West Region	608577	08/27/2015	Returned	\$0	Renee McFadden	Tricia Glenn	05/26/2015	>

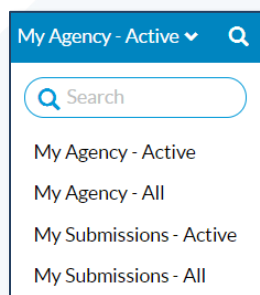
Submissions widget title bar

The Submissions widget title bar contains the **Active** filter drop-down, the **Search** icon and the **Tools** icon.



Active filter drop-down - The Active filter determines what is displayed in the Submission workspace. If you're not seeing the expected information, make sure you've selected the correct option from the Active filter drop-down list. For more information, see [Filtering Information in Snap](#).

- The Submissions widget has four preset Active filters.
- Custom filters you create and save will also appear in this list, making this a very convenient feature.



Search icon - The Search icon lets you access Snap's search criteria to create filters for a variety of purposes. As you add or change criteria, the results shown in the workspace change to reflect this. For more information, see [Filtering Information in Snap](#).

Use the Search icon to:

- Enter search criteria to define filters.
- Name and save filters for future use.












Tools icon - The Tools icon allows you to customize the Submissions widget and export your filtered data. Use the Tools icon to:

- Minimize or maximize the Submissions widget.
- Configure which columns display in the workspace.
- Download the displayed Active filter / Search results as a .csv file (to use with Excel or another program.)



Submissions widget workspace

The workspace area displays the Active filter / Search results and consists of sortable column headers and expandable rows. This area also displayed a scroll control, so be sure to use it if needed.

Insured	Account Name	Agency	Submission	Effective	Status	Premium	Underwriter	Assigned To	Received Date	
FLORIDA BOTTLING INC 	FLORIDA BOTTLING INC	McGriff Insurance Services, Inc.	564640	12/24/2015	Returned	\$0	Sue Armellino	Christine Bruning	11/25/2014	> ^
Personal Touch Lawn Care Inc 	Personal Touch Lawn Care Inc	Tanner, Ballew and Maloof, Inc.	573862	02/10/2016	Returned	\$0	Doris Reilly	Doris Reilly	01/13/2015	>
Engen Enterprises ACORD eff 7-1	Engen Enterprises ACORD eff 7-1	All Risks Ltd - Texas		07/01/2015	Returned	\$0	Gina Douglas			>
Doering Landscape Co 	Doering Landscape Co	Corkill Insurance	600737	06/03/2015	Returned	\$37,382	Angie Watson	Jori Field	04/23/2015	>
DLK Trucking Inc 	DLK Trucking Inc	MarketScout Corporation		07/01/2015	Returned	\$0	Gina Douglas			>
Priority Parking Service 	Priority Parking Service	Non-appointed Agent - West Region	605855	08/15/2015	Returned	\$0	Jana Reznicek	Jana Reznicek	05/13/2015	>
American Advisors Group 	American Advisors Group	Professional Insurance	606166	08/01/2015	Returned	\$0	Elika Georgieva	Christine Ilomin	05/14/2015	>
Above & Beyond Landscaping LLC	Above & Beyond Landscaping LLC	CAL Risk Management	606920	08/03/2015	Returned	\$0	Crystal Gooding	Tina Coutts	05/20/2015	>
Omnilife USA Inc. 	Omnilife USA Inc.	MarketScout Corporation		07/01/2015	Returned	\$0	Raeshel Parker			>
Sunshine Hotels c/o Culver Hotel 	Sunshine Hotels c/o Culver Hotel	Edgewood Partners Insurance Center	607651	08/01/2015	Returned	\$0	Michael Engell	Michael Engell	05/22/2015	>
United California Freight Solutions 	United California Freight Solutions	Non-appointed Agent - West Region	608577	08/27/2015	Returned	\$0	Renee McFadden	Tricia Glenn	05/26/2015	> v

- Click a **column header** to sort a column alphanumerically in ascending or descending order. *Note: The 'Status' column sorts in workflow order.*

- Click a **submission row** to access a submission.
- Click the **Expand icon** (below) to view additional submission details.



Paging buttons

The paging buttons are located under the widget's workspace. Space in the widget is limited, so make sure you use these to view all the information rows returned by the Active filter.



Recent Activity widget

The Recent Activity widget displays any type of activity that has taken place on a submission. It also contains a title bar, the workspace and the paging buttons.

Recent Activity : My Branch - All

The Ponderosa Telephone Co DBA: Ponderosa Telephone 7/12/19 3:51 PM Changes Acknowledged by Toby Marx	>	^
Newport Flavors & Fragrances 7/12/19 3:46 PM 1055134 for Newport Flavors & Fragrances changed to Clear by Toby Marx	>	
Avanti Agency Corp WSD 2161584 07 7/12/19 3:38 PM 368184: new attachment by Attachment Service	>	
G & E Healthcare (A Corp) WSD 5005839 03 7/12/19 3:38 PM 471290: new attachment by Attachment Service	>	
Benito Valley Farm LLC 7/12/19 3:31 PM 1071555 Changed Assigned To Underwriter to David Smith by Toby Marx	>	
Signature Coast Holdings LLC (NV) 7/12/19 2:49 PM Changed Assigned To Underwriter to Toby Marx by Toby Marx	>	
Saldana's Landscape & Maintenance, Inc. 7/12/19 2:46 PM 1071554: deleted task by Toby Marx	>	
Taylor, Vincent (Indv) 7/12/19 2:41 PM copy submission created by Jody Quint	>	
British American Tool & Die LLC	>	v

Back
1
2
3
4
5
6
7
8
9
10
Next
Showing 1 to 25 of 35206 Submissions

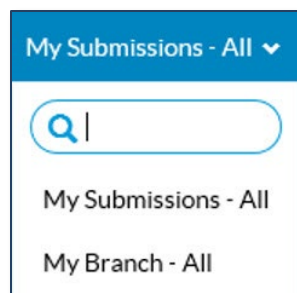
Recent Activity widget title bar

The Recent Activity widget title bar contains the Active filters drop down, the Search icon and the Tools icon.



Active filter drop-down - The Active filter determines what displays in the workspace. If you're not seeing the expected information, make sure the Active filter selection is correct. For more information, see [Filtering Information in Snap](#).

- The Recent Activity widget has two Preset filters.
- Any custom filters you define and save are shown here.



Search icon - The Search icon lets you access Snap's search criteria to create filters for a variety of purposes. As you add or change criteria, the results shown in the workspace change to reflect this. For more information, see [Filtering Information in Snap](#).

Use the Search icon to:

- Enter search criteria to define filters.
- Name and save filters for future use.



Tools icon - The Tools icon contains options that let you minimize or maximize the size of the Recent Activity widget.



Recent Activity widget workspace

The Recent Activity workspace displays the Active filter results. Each section of text is referred to as a “card”.

Avanti Agency Corp WSD 2161584 07 7/25/19 8:51 AM 368184: new attachment by Attachment Service	>	^
G & E Healthcare (A Corp) WSD 5005839 03 7/25/19 8:51 AM 471290: new attachment by Attachment Service		
Jacek Inc WNJ 5043137 00 7/25/19 5:00 AM sent an e-mail:Re: Jacek Inc WNJ 5043137 00- submission reminder by System		
Cal Building Systems Inc 7/25/19 4:23 AM Cal Building Systems Inc: Withdrawn by System	>	
Natural Abilities LLC 7/25/19 4:23 AM sent an e-mail:Re: Natural Abilities LLC - Submission Closed by System	>	
Judy s Home for the Elderly 7/25/19 4:23 AM Judy s Home for the Elderly: Withdrawn by System	>	
Climb Inc 7/25/19 4:23 AM Climb Inc: Withdrawn by System	>	
Halcyon Electric Inc 7/25/19 4:23 AM sent an e-mail:Re: Halcyon Electric Inc - Submission Closed by System	>	
Penn Mar Organization Inc 7/25/19 4:23 AM 1061674 for Penn Mar Organization Inc changed to Lost by System - Quoted but No response	>	
Linns Fruit Bin Inc	>	v

- Click on the **text** of a card to access the submission.
- Click the **Expand icon** located to the right of each card to view additional recent activity details.



Paging buttons

The paging buttons are located under the widget’s workspace. Space in the widget is limited, so make sure you use these to view all the information rows returned by the Active filter.



Tasks widget

The Tasks widget displays the status of tasks assigned to and by you. As with the previous widgets, it contains a title bar, workspace and the paging buttons.

Tasks : My Tasks Q ⚙							
Resolved	Due Date ^	Task Summary	Insured	Assigned To	Task Details	Effective	
		Update applicati...	Pet Centers of America	Jana Reznicek	Update applicat...	11/15/2017	➤
		Update applicati...	Pet Centers of America	Jana Reznicek	Update applicat...	11/15/2017	➤
	06/19/2019	IQ review	Bronco Van & Storage I...	Jana Reznicek	make sure when...	07/01/2019	➤
	06/19/2019	IQ renewal revi...	S & S Ag & Constructio...	Jana Reznicek	this renewal will...	07/21/2019	➤
	06/29/2019	IQ renewal revi...	Brown, Ned (Indv)	Jana Reznicek	This renewal co...	08/01/2019	➤
	07/16/2019	5 Day Over	Always Best Care of th...	Jana Reznicek	Test	08/26/2019	➤
	07/30/2019	Contact Insured	Pharma Natural Inc	Jana Reznicek	Test	09/01/2019	➤
	08/20/2019	Pending Under...	Joe's Diner LLC	Jana Reznicek	Underwriting	09/02/2019	➤

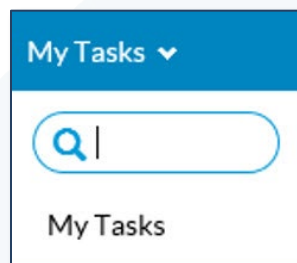
Tasks widget title bar

The Tasks widget title bar contains the Active filters drop down and the Tools icon.



Active filter drop-down - The Active filter determines what displays in the Tasks widget workspace. If you're not seeing the expected information, make sure the Active filter selection is correct. For more information, see [Filtering Information in Snap](#).

- The Tasks widget has one Preset filter.



Tools icon - The Tools icon contains options that let you customize the Tasks widget and export filtered data.

- Minimize or maximize the Tasks widget.
- Configure which columns display in the workspace.
- Download a .csv file of the search results from the Active filter.
- Bulk update tasks.



Tasks widget workspace

The Tasks workspace area displays the Active filter results and consists of columns and rows.

Resolved	Due Date ▲	Task Summary	Insured	Assigned To	Task Details	Effective	
		Update applicati...	Pet Centers of America	Jana Reznicek	Update applicat...	11/15/2017	➤
		Update applicati...	Pet Centers of America	Jana Reznicek	Update applicat...	11/15/2017	➤
	06/19/2019	IQ review	Bronco Van & Storage I...	Jana Reznicek	make sure when...	07/01/2019	➤
	06/19/2019	IQ renewal revi...	S & S Ag & Constructio...	Jana Reznicek	this renewal will...	07/21/2019	➤
	06/29/2019	IQ renewal revi...	Brown, Ned (Indv)	Jana Reznicek	This renewal co...	08/01/2019	➤
	07/16/2019	5 Day Over	Always Best Care of th...	Jana Reznicek	Test	08/26/2019	➤
	07/30/2019	Contact Insured	Pharma Natural Inc	Jana Reznicek	Test	09/01/2019	➤
	08/20/2019	Pending Under...	Joe's Diner LLC	Jana Reznicek	Underwriting	09/02/2019	➤

- Click a **row** to access a submission.
- Click a **column header** to sort a column alphanumerically in ascending or descending order.
- Click the **Expand icon** to see additional task details.



Paging buttons

The paging buttons are located under the widget's workspace. Space in the widget is limited, so make sure you use these to view all the information rows returned by the Active filter.



Submissions Page Overview

When you click on one of the submission rows on the Homepage, you'll open the Submission Page. This contains the submission information and the options necessary to complete and submit the application to ICW Group for consideration. You can view your proposal, quote and issued policy.

Each Submission page in Snap has the same three screen areas:

- Status bar
- Main workspace
- Left navigation

Status bar

Once the Submission Page displays, you'll see the status bar below the Top navigation bar. This contains:

- A. **Status Summary** - Quickly see details about the submission's status.
- B. **Process Breadcrumbs** - Lets you know where the submission is in the overall process.
- C. **Workflow buttons** - Provides previous and next workflow steps, depending on where you are in the process.
- D. **Actions button** - Provides a drop-down list of the steps you can take based on the page you're viewing.
- E. **Snippet icon** - Opens a window to view sections of the ACORD application.
- F. **Collaboration icon** - Opens the Collaboration tool.



Workspace

The workspace is the information entry area of Snap and captures the necessary information to create a submission for ICW Group's consideration.

General Information

Insured's Mailing Address

✓Address #1: 2210 MAY ROAD

Address #2:

✓ZIP Code: 18465 ✓City: Thompson

✓State: Pennsylvania

Email address:

Website address:

Insured Information

✓Legal Entity: LLC

✓FEIN: 777816238

NAICS #:

DMV #:

WCIRB ID (CA):

NCRB ID (NC):

NJCRIID (NJ):

CAOM ID (MI):

✓Years in Business: 12

SIC Code: Select a Code

PUC #:

NCCI ID:

PCRB ID (PA):

WCRB ID (WI):

MWCIA ID (MN):

Other Bureau States

Other Bureau States:

Other Bureau ID:

Please choose

Contact Information

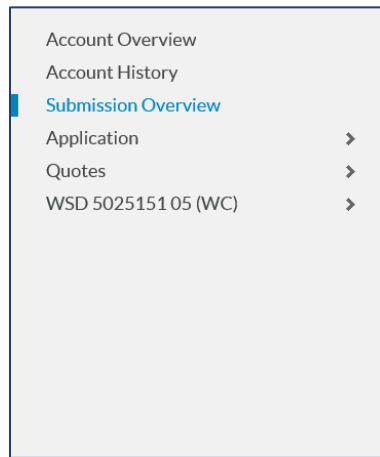
	Name	Title	Phone	Ext.	Fax	E-mail	
Inspection:	FREDDY'S REFUSE I		5707272067				
Accounting:	FREDDY'S REFUSE I		5707272067				<input type="checkbox"/> Same as Inspection Contact
Claims:	FREDDY'S REFUSE I		5707272067				<input type="checkbox"/> Same as Inspection Contact
Payroll Records:							<input type="checkbox"/> Same as Inspection Contact

Left navigation

The left navigation provides links to pages to view or enter information. Depending on the status of your submission, the submission page links may include:

- **Account Overview** - Displays after ICW Group initially processes the submission. It shows the primary business name and address for submissions grouped into one account.
- **Account History** - Lists the agency's previous and current submissions and policies. Simply click a row to open that submission.
- **Submission Overview** - Provides specific information such as the Insured Name, Effective and Expiration Dates, Agency Team and ICW Group Team.
- **Application** - Contains sub-links to forms that capture specific details for the insured necessary to submit an application to ICW Group.

- **Quotes** - Displays quote proposals created by your ICW Group team. You'll also receive an email which is included as an attachment. Proposals for Instant Quotes appear under this tab during the submission process.
- **Policy** – This is enabled when ICW Group provides coverage. You'll find information here for endorsements, cancellations and reinstatements. The link will display as the policy number.



Filtering Information in Snap

Snap uses search criteria for filters to return results based on the information selected. There's always an Active filter in effect that determines the information displayed in a widget's workspace. You can use Preset filters for each widget. You also have the ability to create and save your own custom filters for the Submissions and Recent Activity widgets.

Snap Preset filters

The following list are Preset filters that come with Snap. **Reminder:** *If you're not seeing the results you expect, ensure the **Active filter** setting is correct!*

Widget	Preset filter name	Use
Submissions	My Agency – Active	View in-force and in-progress submissions for your entire agency.
Submissions	My Agency – All	View expired, declined and canceled submissions in addition to in-force and in-progress submissions for your entire agency.

Submissions	My Submissions – Active	View active submissions assigned to you.
Submissions	My Submissions – All	View expired, declined and canceled submissions in addition to in-force and in-progress submissions assigned to you.
Tasks	My Tasks	View tasks assigned to you or assigned by you.
Recent Activity	My Agency – All	View activity for expired, declined and canceled submissions in addition to in-force and in-progress submissions for your entire agency.
Recent Activity	My Submissions – All	View activity for expired, declined and canceled submissions in addition to in-force and in-progress submissions assigned to you.

Selecting a filter

Changing the Active filter to a different Preset filter or Custom filter is easy.

1. Click the **drop-down arrow** next to the Active filter's name to display the list.
2. Click on a filter to make it the Active filter.

Using Custom Saved filters

You can add multiple search criteria together to create a Custom Saved filter so focused it drills down to a single record, or so broad it shows you hundreds of records. It really depends on what you need to accomplish.

You can create Custom Saved filters in the Submissions and Recent Activities widgets by clicking the Search icon located in the widgets' title bar. The criteria available to build filters will vary depending on the widget you're using.

Submission widget search criteria

When you click the Search icon in the Submissions widget, the first criteria field, Insured, is automatically shown. This field is unique and lets you search by an insured name, a policy number or a submission number.

- | | | |
|-----------------------------------|------------------------|--------------------------------|
| ▪ ACORD Upload | ▪ FEIN | ▪ Rewrite/Reissue Pending |
| ▪ Account # | ▪ Instant Quote | ▪ Service Users |
| ▪ Branch | ▪ MWCIA ID (MN) | ▪ State |
| ▪ Bypassed Supplemental Questions | ▪ Maximum Premium | ▪ Submission/Policy number |
| ▪ CAOM ID (MI) | ▪ Minimum Premium | ▪ Task Status |
| ▪ Cancellation Pending | ▪ NAICS | ▪ Task Summary |
| ▪ City | ▪ NCCI | ▪ Temporary Market Reservation |
| ▪ Date Modified | ▪ NCRB ID (NC) | ▪ Transaction Type (new/renew) |
| ▪ Date Received | ▪ NJCRIB ID (NJ) | ▪ Trigger Time |
| ▪ Effective Date | ▪ PCRB (PA) | ▪ ICW Group Team |
| ▪ Endorsement Pending | ▪ Producer or Contact | ▪ WCIRB (CA) |
| ▪ Expiration Date | ▪ Quote Needed By Date | ▪ WCRB (WI) |

Tasks widget search criteria

- | | | |
|---------------|-----------------|----------------------|
| ▪ Assigned By | ▪ Next Action | ▪ Submissions Filter |
| ▪ Assigned To | ▪ Overdue | ▪ Task Status |
| ▪ Create Date | ▪ Priority | ▪ Task Summary |
| ▪ Due Date | ▪ Resolved Date | |

Recent Activity widget search criteria

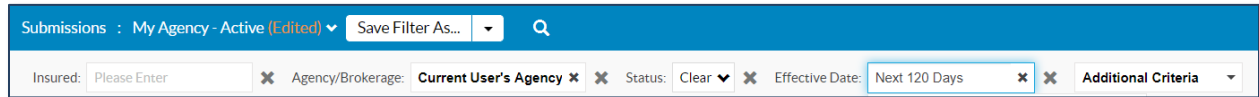
- Actor Type
- Insured
- Submission Filter
- Trigger Time

Using date ranges

Date range criteria cover a variety of values and can be set for specific timeframes, such as 10/01/2024 to 12/10/2024. You also have the option to use dynamic ranges that move forward with the calendar, such as This Week, This Month, This Quarter, This Year, MTD, YTD and Next 120 Days. A range, such as This Month applied to the Effective Date, will always display submissions effective in the current calendar month.

Creating Custom Saved filters

1. First, ensure the Active filter is broad enough to include the information you're searching for.
2. Click the **Search** icon in the widget's title bar.

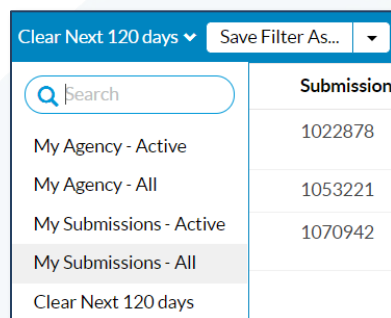


3. Update or delete the displayed search criteria fields.
4. Click the drop down in the **Additional Criteria** field.
5. Select any additional criteria, if necessary.
6. Select the criteria's **Type**, if options are displayed.
7. Add additional criteria if desired.

Saving a custom filter

Once you've selected your criteria, the **Save Filter As** button becomes available. This button also contains the Reset Filter option that returns the filter to its original state, if you need to start over. Once you save a custom filter, it becomes a "Saved Custom filter" and appears in the filters drop down. Your Saved Custom filters are associated to your Snap ID, so name them something meaningful to you.

1. Ensure the filter's criteria are accurate.
2. Click the **Save Filter As** button in the widget's title bar.
3. Name the filter and click **Save**.
4. The filter you saved is now listed in the Active filter drop down.



Submission	
1022878	My Agency - Active
1053221	My Agency - All
1070942	My Submissions - Active
	My Submissions - All
	Clear Next 120 days

Editing a Custom Saved filter

You can also use a Custom Saved filter as the starting point to create a new filter.

1. Select the Custom Saved filter.
2. Click the **Search** icon.
3. Adjust the filter criteria.
4. Click **Save Filter As**.
5. Name the filter and click **Save**.

Delete a Custom Saved filter

Over time, your Custom Saved filters list may grow long or contain Custom Saved filters you no longer need.

1. Select the filter you wish to delete.
2. Click the **Save Filter As** drop-down.
3. Select **Delete filter**.
4. Click **Delete**.

Snap Collaboration Tool

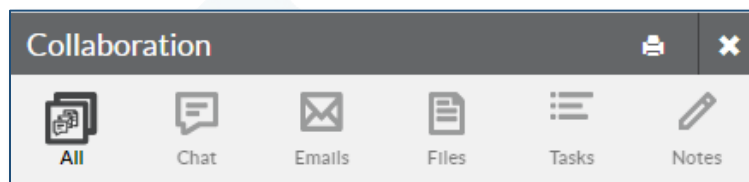
Snap's Collaboration tool is an excellent way to manage files and documents associated with a submission. You can also create reminder notes to keep the process on track. This tool becomes available once you enter a submission.

1. To view or edit the details of a Collaboration card, click the card.
2. Use the Expand icon to close the card details.
3. To view a file associated with a card, click the blue hyperlink.
4. You can download any files attached to cards.

Collaboration Types

Snap's Collaboration tool uses **Types** to organize the various kinds of Collaboration cards in the workspace. Cards display with the most recent at the top of the list.

- **All** - Shows you everything associated with the submission and is the best Type to have selected when performing a search.
- **Chat** - Currently not available, but will be enabled in a future release.
- **Emails** - Displays all email associated with a submission.
- **Files** - Displays all files associated with a submission.
- **Tasks** - Displays tasks assigned to, and by, you.
- **Notes** - Lets you create reminders, to do lists and other communications to manage your submissions and policies.

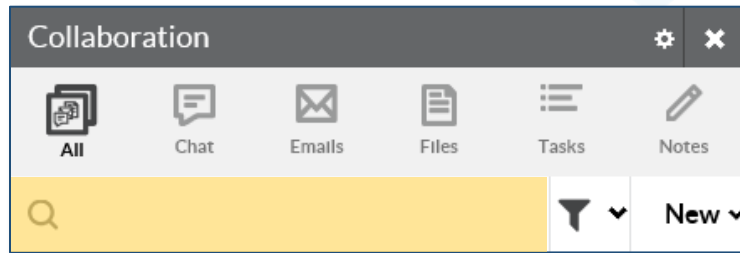


Searching and filtering Collaborations

Located below the types are the **Search** and **Filter** icons. Use these functions to help find specific Collaborations and files associated with Collaborations. Snap searches within the selected Type. For the broadest results, ensure **All** is selected before you search or filter.

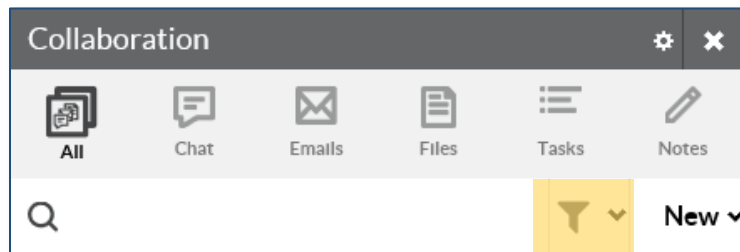
Search field

Use the search field for a text-based search across all records. Snap will match full and partial terms, but is not case sensitive. Results display in the workspace chronologically.



Filter icon

Use the filter icon for a single-criteria search that returns matching results. Make a selection from the drop down and, if those files are present, Snap displays the results in the workspace chronologically.



Using Collaborations

Starting a new Collaboration

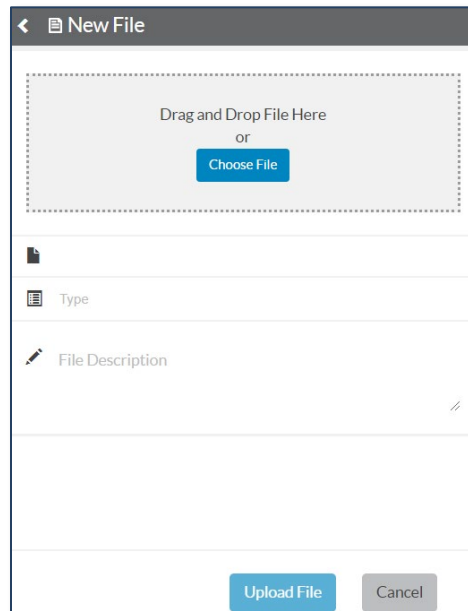
1. Simply select the **Type icon** you would like.
2. Click the **New** button
3. Or, click the **New** button and select from the list.

Create a Files Collaboration

You can upload PDFs, Word documents, Excel workbooks, images, emails and most file types.

1. Click on the **Files** icon.

2. When the new card opens, drag and drop the file from your desktop or click **Choose File** to upload and browse to select the file.



3. Click **Type** to choose an identifier for the document.
4. Enter a **File Description**. The description text is searchable by Snap so make sure it contains relevant terms.
5. Click **Upload File**.

Delete a Files Collaboration

1. Click the card to open the card.
2. Click the **Delete** button.
3. Click **Yes** to remove the file and its association with the submission.
 - You cannot delete attachments that ICW Group adds to a submission.
 - You cannot delete files once the application is submitted to ICW Group.

Create a Notes Collaboration

1. When the new card opens, select the **Type identifier** for the note.
2. Enter the information in the text area.

3. Click **Save**.

Edit a Notes Collaboration

1. Click on the Note you'd like to edit.
2. Enter your changes in the text area.
3. Click the **Collapse** arrow to save your changes.

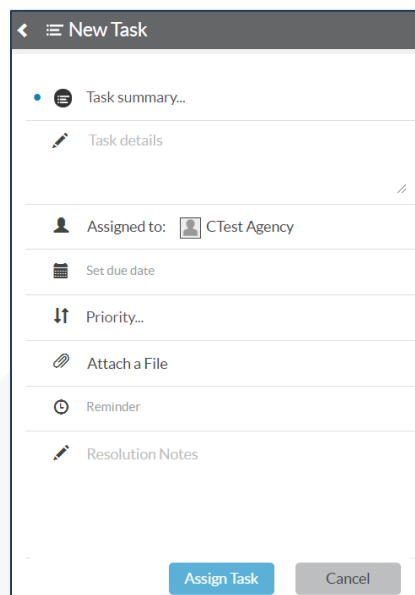
Delete a Notes Collaboration

1. Click on the card for the Note you wish to delete.
2. Click Delete.

Create a Task Collaboration

Tasks are an important Collaboration tool for workflow. Tasks, due dates and comments appear in the Tasks widget on the Home page. When the task becomes due, a reminder pops up within Snap. If you selected the Email Reminder option, an email notice is also sent. Submission Tasks are viewable by everyone at your agency.

1. Click on **Task**, and then click on **New**.
2. When the new card opens, click on **Task Summary** and select a **Task Summary**.



3. In the **Task Details** area, enter a description. Note: Information entered here is searchable by Snap, so make sure to include a few key terms.
4. Click the **Calendar** icon to **Set Due Date**.
5. Click **Priority** if you'd like to set a priority level for the task.
6. Click **Attach a File** to select existing files associated with the submission, or click **Upload a New File**.
7. Enter a Type and Description for the file. Files must have a Type and Description before they can be uploaded.
8. Check **Reminder** if you would like to receive an email on the due date.
9. Click **Assign Task**.

Update or resolve a Task

1. From the Task widget or from within the Collaboration tool, click the **Task** to open it.
2. Enter your comments in the **Resolution Notes** field.
3. Select a new **Due Date** if you need more time to complete the Task.
4. If you've updated the Task, click the **Expand** icon to close the Task.
5. If you've completed a Task, click **Resolve Task**.
 - Completed Tasks for a submission appear in a group below Open Tasks.
 - Marking a task as Resolved cancels the Due Date pop up and email.

Creating Snap Submissions

Using Snap to submit risks for consideration to ICW Group is simple, whether it's for our Instant Quote policies or a complex risk that requires underwriting review. Applications are considered to be in Draft status until they're submitted.

Important information about submissions

Snap submissions can be created in several ways.

- Snap direct entry.
- Upload from an ACORD PDF (for instructions, see the Upload Guide at <https://agentportal.icwgroup.com/login>).

- Or, via email.

Submission processing steps

The submission underwriting and approval process follows these basic steps:

1. Input all the required information to create a submission.
2. Submit the application. ICW Group reviews the information and if the risk fits within our appetite, ICW Group will quote the submission.
3. Review the ICW Group quote and any documents for accuracy.
4. Contact ICW Group to bind the coverage.
5. ICW Group sends the policy documents for you to review and deliver.

Submission information overview

When creating Snap submissions, you will need to ensure **all required fields are completed** in order for an application to be submitted. The Snap Application page contains the sub-links to the pages with the necessary required fields.

Submission Overview	
Application	
General Information	1
Locations - Class Codes	12
ACORD Questions	
Supplemental Info	1
Experience	

Application pages display blue required field indicators next to their link, showing the number of fields that must be completed before the application can be submitted for consideration. The required field indicators are active links - you can click on them to move to the first required field on a page.

Submission Overview page

The Overview page contains basic information for the insured, including:

- Insured Name
- Effective and Expiration Dates
- Needed by Date

- Agency Information
- ICW Group Contacts

General Information page

Required fields on the General Information page include:

- Mailing address
- Legal entity type
- FEIN
- Years in business
- Billing type
- Blanket Waiver of Subrogation
- Policy type
- Payment plan type
- Description of operations

Locations – Class Codes page

Required fields on the Locations – Class Code page include:

- Location Data
- Class Code Data
- Additional Policy Information (these fields are not required)
- Part 2 Limits
- Policy Year Payroll
- NAD/ARD
- Special coverages

ACORD Questions page

If an ACORD application wasn't uploaded with the submission, the ACORD questions can be completed on the ACORD Questions page. Required fields on this page includes:

- Information for the individuals to be included or excluded, if a name is entered.
- ACORD questions.

Supplemental Info page

This page contains supplemental questions pertaining to safety, return to work programs, medical insurance and additional questions based on the classes of business.

Checking the Instant Quote option when creating a new submission displays additional Instant Quote questions. If you bypass this step, Snap reviews the account for Instant Quote eligibility when submitted. If eligible, Snap presents the questions immediately for entry.

- All supplemental questions must be answered before an IQ submission can be submitted or quoted.
- Once you click the Radio button to answer the IQ questions, you cannot unclick it and hide the questions; you must answer them.

For Non-IQ submissions:

- You may bypass answering supplemental questions and reserve the market unless you are within 60 days of the effective date. In that case, the supplemental questions must be answered in order to submit.
- Supplemental questions must be answered before a policy can be quoted.

Experience page

Once currently-valued loss runs are obtained for a submission, ICW Group will enter the information on this page.

- **For IQ Business** - Loss runs are not required until the account is bound. To bind, click **Begin Binding** and attach four years of currently-valued loss runs into Snap, or as many years as applies up to four years. Currently-valued loss runs are valued within 120 days of the effective date.
- **For Non-IQ Business** - Four years of currently-valued loss runs are needed to reserve the market.

Create a submission

1. Click the New Submission button from anywhere in Snap.
2. Enter the information on the Submission Details window.
 - a. Click **Upload** from an ACORD application, if using an ACORD application.
 - b. Enter the **Insured Name**, this field is required if you do not use Upload.
 - c. Change the auto filled **Effective** and **Expiration Date** if needed, if you do not use Upload.

- d. Enter an optional **Needed by Date**.

Snap lets you prequalify and check clearance on an application in one step, or you can perform them individually from the Submission Details screen. You can also perform these actions for submitted applications using the Actions button.

- **Prequalify** - Determines whether the risk is within ICW Group's appetite before taking the time to complete the application.
 - **Check Clearance** - Looks for matching submission 90 days before and after the entered effective date and one year back from the effective date.
3. If you do not wish to prequalify or check clearance at this time, click the **Create Application** button.

Prequalifying and Checking Clearance during application creation

1. Once the submission details are entered, click the **Prequalify/Check Clearance** button.
2. Select **Prequalify**, **Check Clearance** or both.
3. Enter the required information.
4. Click the **Next** button.

Based on the options you chose, Snap shows you if matching submissions were found, if the risk's characteristics are within ICW Group's risk appetite and the manual premium for the risk.

- If you're satisfied with the results of the prequalification and clearance check, click Create Application.
- Use the Back button to return to the input window to change information.
- Use the Cancel button to cancel the application entry process.

Enter application information

Snap generates the submission pages with the required information you'll need to enter. For uploaded submissions, please confirm the data in Snap from the upload. Once the required information is entered, the application may be submitted for underwriting consideration.

1. Complete the required information on the [General Information](#) page.
2. Complete the required information on the [Locations – Class Codes](#) page.
3. Complete the required information on the [ACORD Questions](#) page.
4. Review the [Supplemental Information](#) and determine whether you'd like to complete it now, or in the future.

5. Use the Collaboration tool to create a new [Files Collaboration](#) and attach four years of currently-valued loss runs if available.

Submit the application

Once all required fields are complete, the Submit button becomes active.

- Click the **Submit** button to send the application to ICW Group.

Check Submission Status

Snap has multiple ways to notify you if there's been progress on a submission.

- Automatic emails from Snap
- Home page Notifications icon
- Recent Activity widget
- Submissions widget

ICW Group Submission Status list

The below table describes what each status term indicates about the submission status.

Draft	Agency created applications not yet submitted to ICW Group for consideration.
Submitted	Applications submitted for underwriting.
Not Clear	Submissions waiting for additional information from your agency. The market is not reserved for these submissions.
Clear	New and renewal submissions reviewed by ICW Group. When new Submissions move to Clear status, they are cleared of prior submissions and the market is reserved for your agency.
Quoted	Submissions with quoted proposals.
Bind Requested	A bind request has been made for the submission.
Bound	The submission is bound and receives a policy number.
Pending Issuance	The policy is pending issuance.

Issued	The policy is issued, and the policy number is listed for the submission.
Cancellation Pending	ICW Group has issued a Notice of Cancellation, or the agency has requested a cancellation.
Declined/Lost/Returned	Submissions with these statuses are declined or otherwise not accepted. Instant Quote accounts that do not qualify for a quote will automatically move to Declined status.
Renewed	Expired policies where ICW Group is providing coverage for the next term.
Expired/Non-Renewed	Policies that have completed their term, and ICW Group is not providing coverage for the next term.
Cancelled	Policies that have reached their cancellation date.

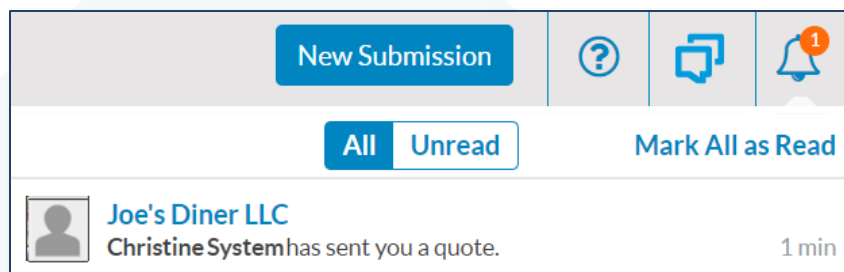
Check status using automatic emails

When the status of a submission changes, Snap will send you a notification email. The link in the email is your shortcut to the submission!

1. From the email, click the **link**.
2. Log in to Snap.
3. Snap instantly opens the updated submission.

Check status from the Homepage using the Notifications icon

When an action has been taken on a submission, an orange indicator appears on the **Notifications icon**.



1. Click the **Notifications** icon to open the list.

2. Use the **All** and **Unread** buttons to toggle between all and unread messages.
3. Click the notification card to open the submission.
4. To mark an item as read, hover over the **New** icon and check the box. You can quickly mark all items as read with the **Mark All as Read** button.
5. Click the **Load more** button to see older notifications.

Checking status using the Recent Activity widget

When an action is taken on a submission, it's documented in the Recent Activity widget. This widget displays results chronologically.

1. Locate the card for the submission.
2. Click the **Expand** arrow to show the list of actions taken on that submission.
 - Cards can contain multiple actions on a single card.
 - Each action taken has a date and time stamp.

Checking status using the Submissions widget

The Submissions widget lists the status of your submission under the Status column, if the column is selected for display. You can also use the submission detail to view a submission's status.

- Clicking the status column header arranges the submissions in workflow order not alphanumeric order.
- Click the Expand arrow at the end of the submission's row to display the expanded view and the submission's current status.

Binding Coverage

When ICW Group quotes a risk and prepares a proposal, you'll receive a notification and see a new page link, Quote, in the Left Nav. If there is only one quote, you'll see a description of the quote as the link. If there are multiple quotes, click the Expand icon to view.

Reviewing a quote

1. Click the Quote name link to open.
2. Ensure the coverages, class code and payroll are correct.
3. If changes need to be made, click the **Actions** button and select **Modify Submission**.

Binding a policy

1. Click the Quote link. For accounts with multiple quotes click the name for the quote you wish to bind.
2. Click the **Request to Bind** button.
 - a. ICW Group is notified through Snap.
 - b. The Summary Status shows Bind Requested.
 - c. Snap notifies you of the policy number when the account is bound.
 - d. When bound, the Summary Status changes to Bound.

Binding an Instant Quote policy

1. Click the Quote link.
2. Click **Begin Binding**.
3. Complete any required fields and attach loss runs to activate the Request to Bind button.
4. Click **Request to Bind**.
5. Click **Yes** to confirm. Agents receive an immediate email with the policy number and a link to view the documents in Snap.

Reserving the Market

Once an application is submitted to ICW Group, you have the opportunity to reserve the market up to 120 days from the effective date with Snap.

Instant Quote submissions

- Complete the application's required fields.
- Complete the Supplemental Info page, Instant Quote questions.
- Four years of currently-valued loss runs must be provided in order to bind a quote.

Non-Instant Quote submissions

- Complete application required fields.
- Attach four years of currently-valued loss runs.

Attaching Loss Runs

Loss runs are necessary to quote a submission and to bind coverage for an Instant Quote submission. Loss runs should be uploaded and associated with the submission in Snap.

- Four years of currently-valued loss runs are required.
- Loss runs must be valued within 120 days of the effective date.

To attach loss runs to a submission

1. From the Homepage, click the submission's information row.
2. Click the **Collaboration** icon.
3. Click the **Files** type.
4. Click **New**.
5. **Drag and drop** the files or **upload** to the Collaboration card.
6. Click **Type** and begin entering "Loss Run" into the text field. When the results auto-populate, select **Loss Run** from the Type list.
7. Click in the **File Description** field to add any notes or an additional description. This field is searchable by Snap, so make sure to include a few key terms in your File Description.
8. Click **Upload File**.

Resubmitting an Application

Lost or declined submissions from prior years may be used as the basis for creating a new application for the next term. The Resubmit Application option will become available 120 days prior to the renewal date.

To resubmit a lost or declined submission

1. In the Submission header, select **Resubmit**.
2. Snap creates a copy of the application and increments dates by one year.
3. The newly created application is in Draft status and assigned to you.
4. Review the information and make any necessary changes.
5. Click **Submit**.

Viewing Policy Documents

Policy and endorsement documents are added to Snap within minutes of their availability. Other documents for invoices, cancellations and reinstatement notices are added each evening and are available for viewing the next day. Loss runs are available on demand by clicking the actions button and then clicking “View Loss Run.”

To view policy documents

1. From the Homepage, click the policy or submission’s information row.
2. Click the **Collaboration** icon and select the Files type. Use the search or filter function to narrow the list if needed.
3. Click a document to open it in a new window.

Emailing a Submission

Email is available for your submissions, but only within 92 days of the effective date. For the best competitive advantage, upload or input your submissions into Snap 120 days prior to the effective date. The submission email address is wcsubmissions@icwgroup.com.

Support information

If you experience any technical issues or have questions about Snap, please contact your Agency’s Snap Administrator. If you continue to experience problems, don’t hesitate to contact Snap Support at **866.975.SNAP** (866.975.7627) or email snapsupport@icwgroup.com.

Thank you!

We hope that this guide was helpful to you and we appreciate your partnership.