

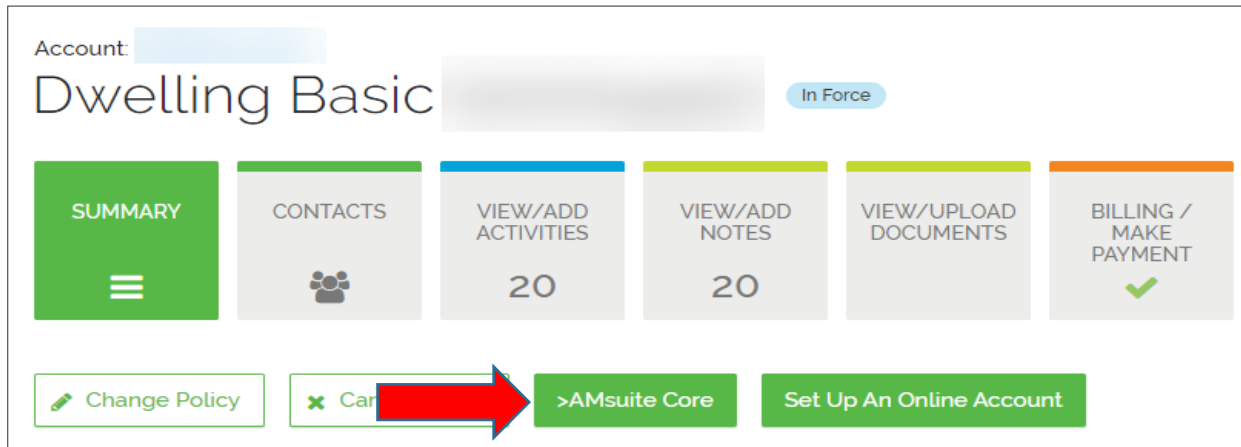


# Paperless Discount

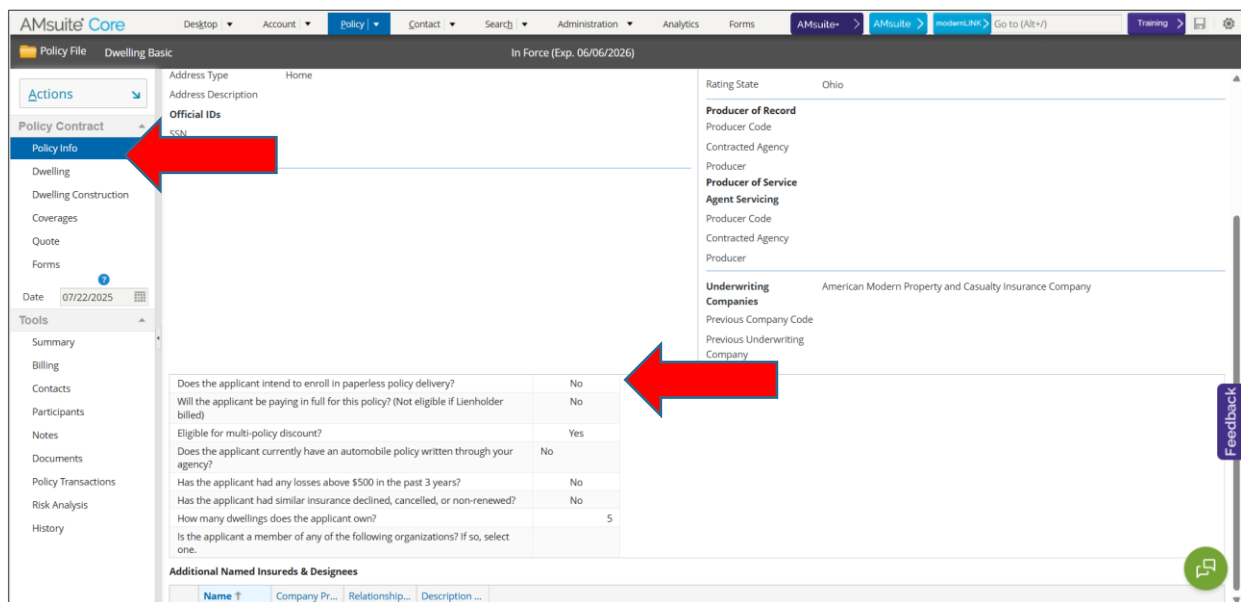
**This job aid will show you how to add the paperless discount to a policy—and how policyholders can enroll through their online account.**

# Paperless Discount

- 1 After accessing the policy, start by selecting AMsuite Core to view the policy level discounts



- 2 Select Policy Info from the left-hand side to see if the paperless discount has already been added



# Paperless Discount

- 3 In the top left-hand corner dropdown menu, select Actions – Change Policy

The screenshot shows the AMSuite Core interface. On the left, a dropdown menu is open under 'Actions'. The 'Change Policy' option is highlighted with a red arrow. The main content area displays policy details for 'Dwelling Basic' (In Force (Exp. 06/06/2026)). The details include: Address Type: Home; Address Description: Home; Rating State: Ohio; Producer of Record: Ken Hicks; Producer Code: 009539; Contracted Agency: Ken Hicks; Producer: Ken Hicks; Agent Servicing: Ken Hicks; Underwriting Companies: American Modern Property and Casualty Insurance Company. Below this, a table of questions is visible:

Does the applicant intend to enroll in paperless policy delivery?	No
Will the applicant be paying in full for this policy? (Not eligible if Lienholder billed)	No
Eligible for multi-policy discount?	Yes
Does the applicant currently have an automobile policy written through your agency?	No
Has the applicant had any losses above \$500 in the past 3 years?	No
Has the applicant had similar insurance declined, cancelled, or non-renewed?	No
How many dwellings does the applicant own?	5
Is the applicant a member of any of the following organizations? If so, select one.	

- 4 Enter the effective date for your policy change and Other as the change description, then select Next

The screenshot shows the 'Start Policy Change' screen in AMSuite Core. The 'Effective Date' field is set to 06/06/2025. The 'Description' dropdown menu is set to 'Other', which is highlighted by a red arrow. The 'Next' button is visible at the top of the form. The left sidebar shows the 'Tools' section with 'Summary' selected.

# Paperless Discount

- 5 “Does the applicant intend to enroll in paperless policy delivery?”  
Select “Yes”

The screenshot shows the AMSuite Core interface for a policy change. The main form area contains several questions with radio button options:

- Does the applicant intend to enroll in paperless policy delivery?  Yes  No
- Will the applicant be paying in full for this policy? (Not eligible if Lienholder billed)  Yes  No
- Eligible for multi-policy discount?  Yes  No
- Does the applicant currently have an automobile policy written through your agency?  Yes  No
- Has the applicant had any losses above \$500 in the past 3 years?  Yes  No
- Has the applicant had similar insurance declined, cancelled, or non-renewed?  Yes  No
- How many dwellings does the applicant own? 5
- Is the applicant a member of any of the following organizations? If so, select one.  none

Additional Named Insureds & Designees section is visible below the questions.

- 6 Select “Quote” to see the change in cost for the policy change

The screenshot shows the AMSuite Core interface for a policy change, specifically the 'Policy Info' section. The 'Quote' button is highlighted with a red arrow. The form displays various policy details:

- Primary Named Insured:** Name, Primary Phone, Primary Email
- Policy Mailing Address:** Change To: [Address field]
- County:** [Field]
- Address Type:** Home
- Address Description:** [Field]
- Official IDs:** SSN [Field]

Additional sections include Policy Details, Producer of Record, Producer of Service, Agent Servicing, and Underwriting Companies.

# Paperless Discount

7 Select "Complete Policy Change" to issue the policy change

The screenshot shows the AMSuite Core interface for a policy change quote. The top navigation bar includes buttons for 'Back', 'Save and Next', 'Edit Policy Transaction', 'Versions', and 'Complete Policy Change'. A red arrow points to the 'Complete Policy Change' button. The main content area displays policy details, including the policy number, primary named insured, address, and various coverages. A table shows the 'Policy Level Coverages' and 'Dwelling Level Coverages' with columns for Description, Value, Premium, Full Term Premium, Eff Date, Exp Date, Proration, and Settlement Option.

Description	Value	Premium
Identity Recovery Cov...		\$20.00
Limit	15,000	
Subtotal		\$20.00

Description	Value	Full Term Premium	Eff Date	Exp Date	Proration	Premium
Dwelling Coverage		\$351.00	06/06/2025	07/22/2025	0.1260	\$44.24
Limit	150,000					
Settlement Option	Actual Cash Value					

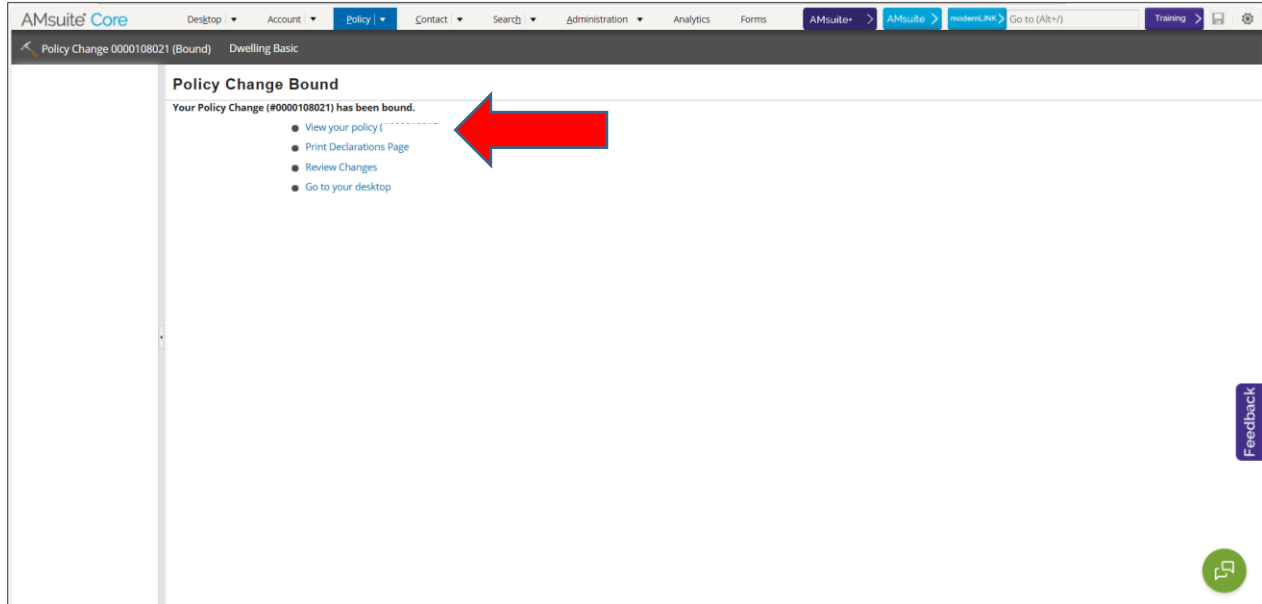
8 Select "OK"

The screenshot shows the AMSuite Core interface for a policy change quote. A confirmation dialog box is displayed in the center of the screen, asking 'Are you sure you want to complete this policy?'. A red arrow points to the 'OK' button in the dialog box. The background shows the same policy details as the previous screenshot.

# Paperless Discount

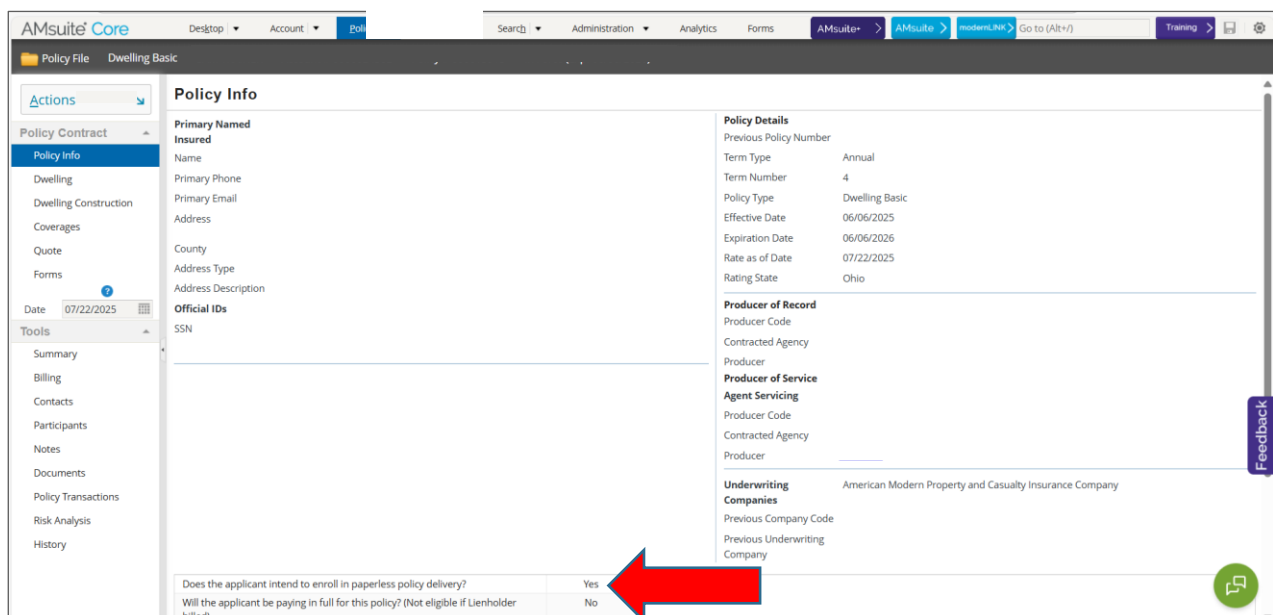
9

The change has been bound. To verify, select "View your policy #"



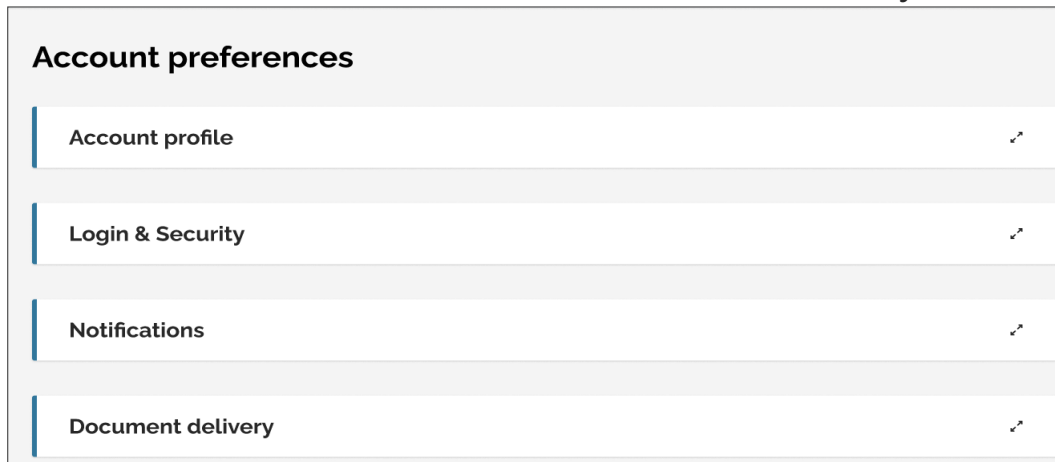
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From Policy Info you can view the discount has been added

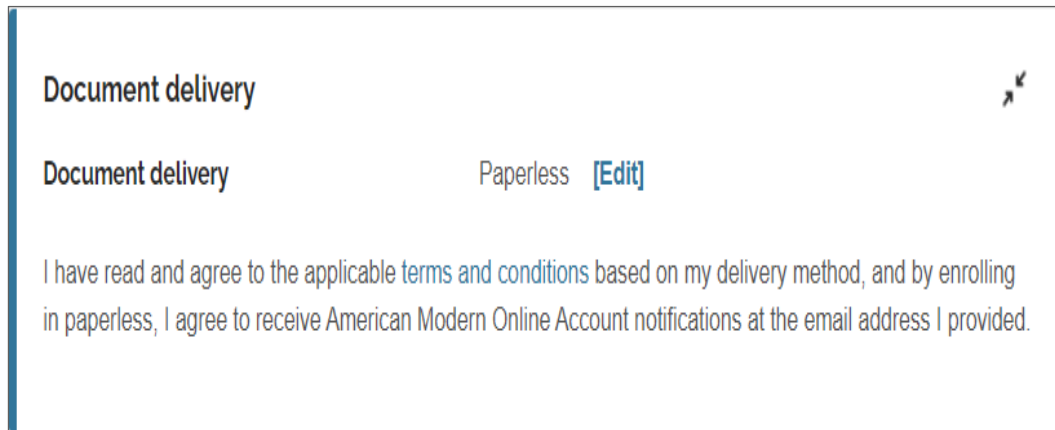


# How policyholders enroll in paperless

To receive the paperless discount you applied, policyholders also need to enroll. First, they log into their online account; then inside Account Preferences, select “Document delivery”



Select Edit, then select Paperless



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