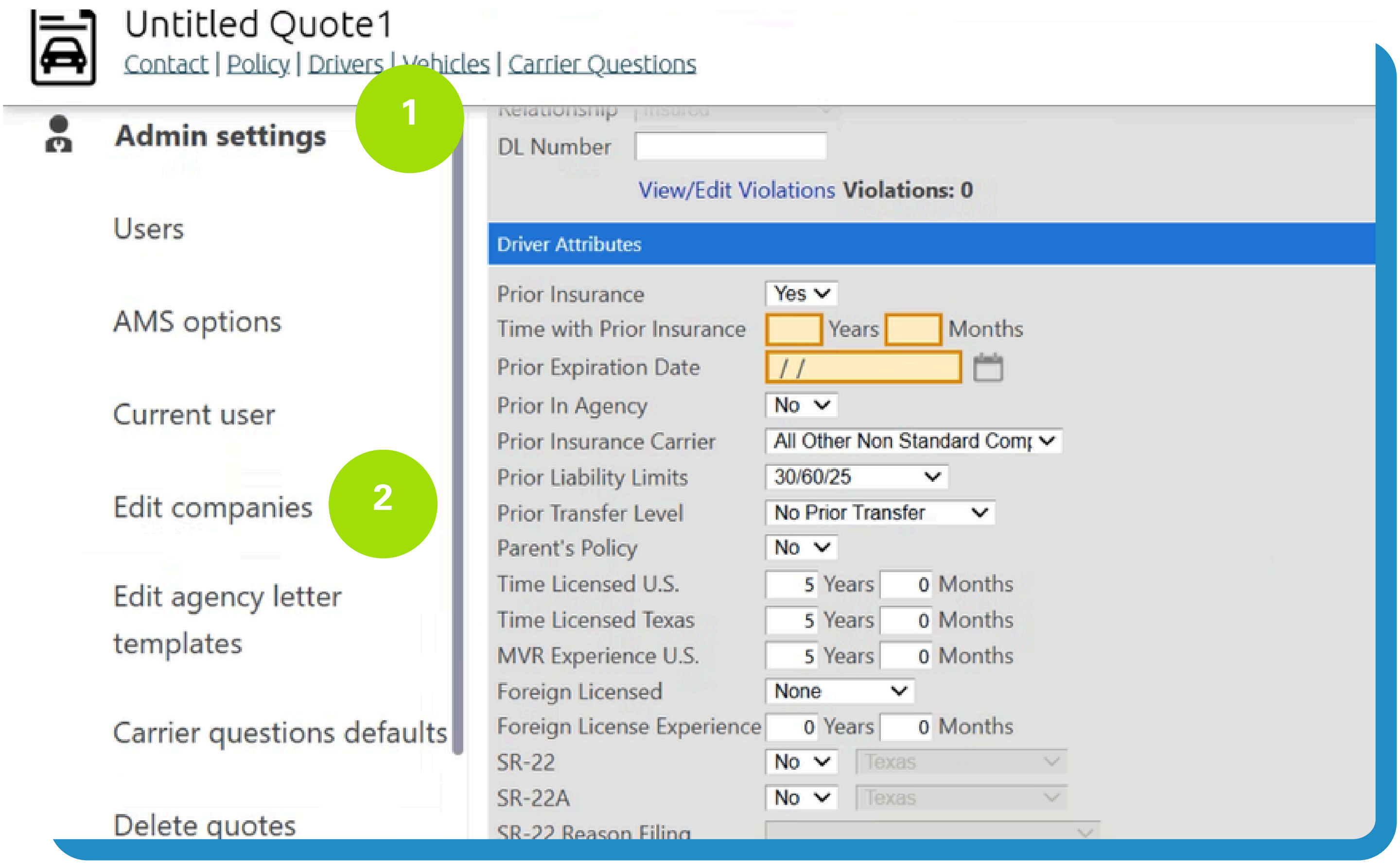
ASPIRE LEARNING ESSENTIALS

How to Create a Policy (Arizona)

Created: January 2026

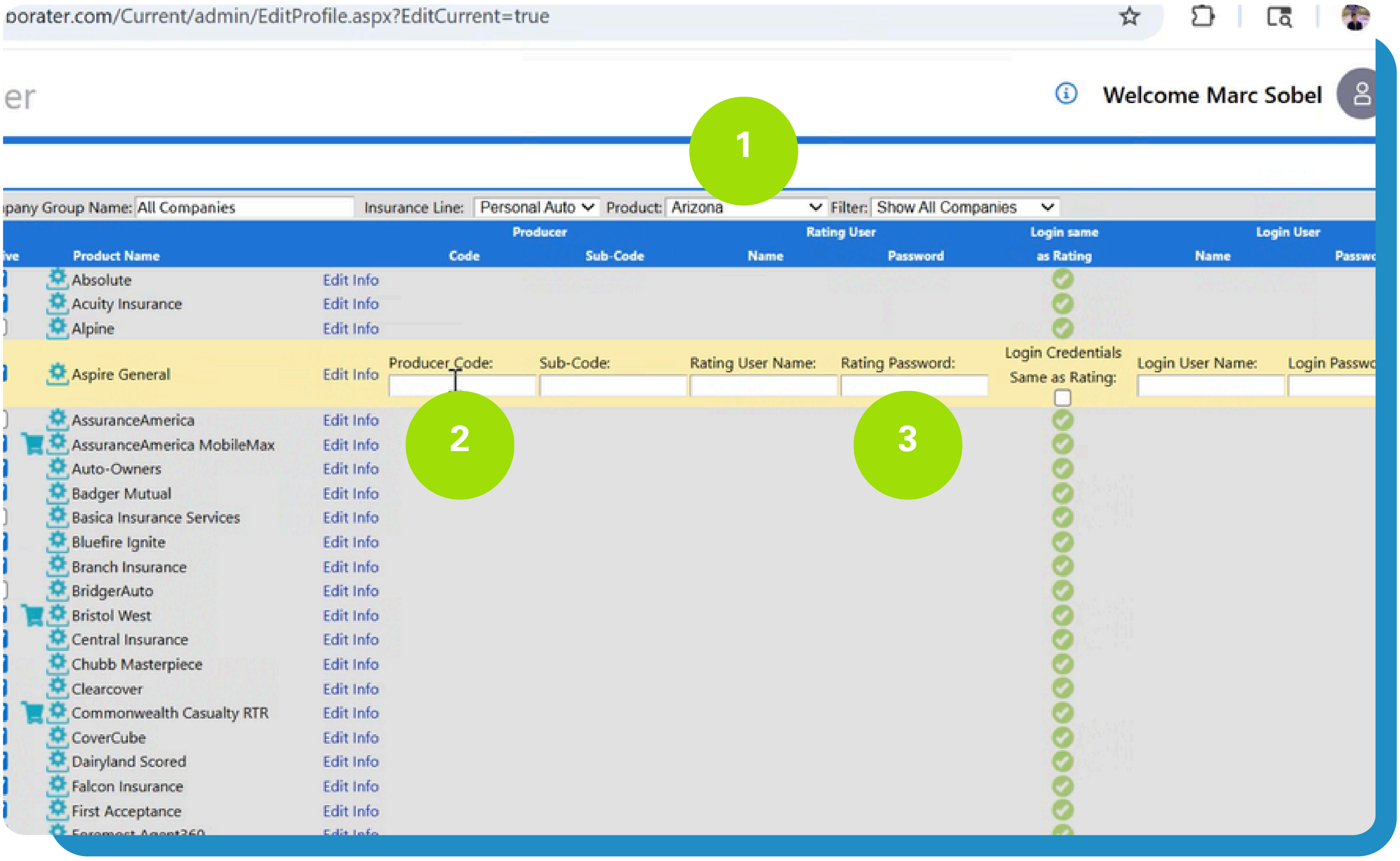


Follow these steps to add your Aspire Producer code to Turbo Rater:

1. In Turbo Rater click on "Admin Settings"

2. In Admin Settings click on "Edit Companies"

Note: The process to add Aspire will be different in a different Rater. You can also sign in directly in the Aspire system by clicking **HERE**.



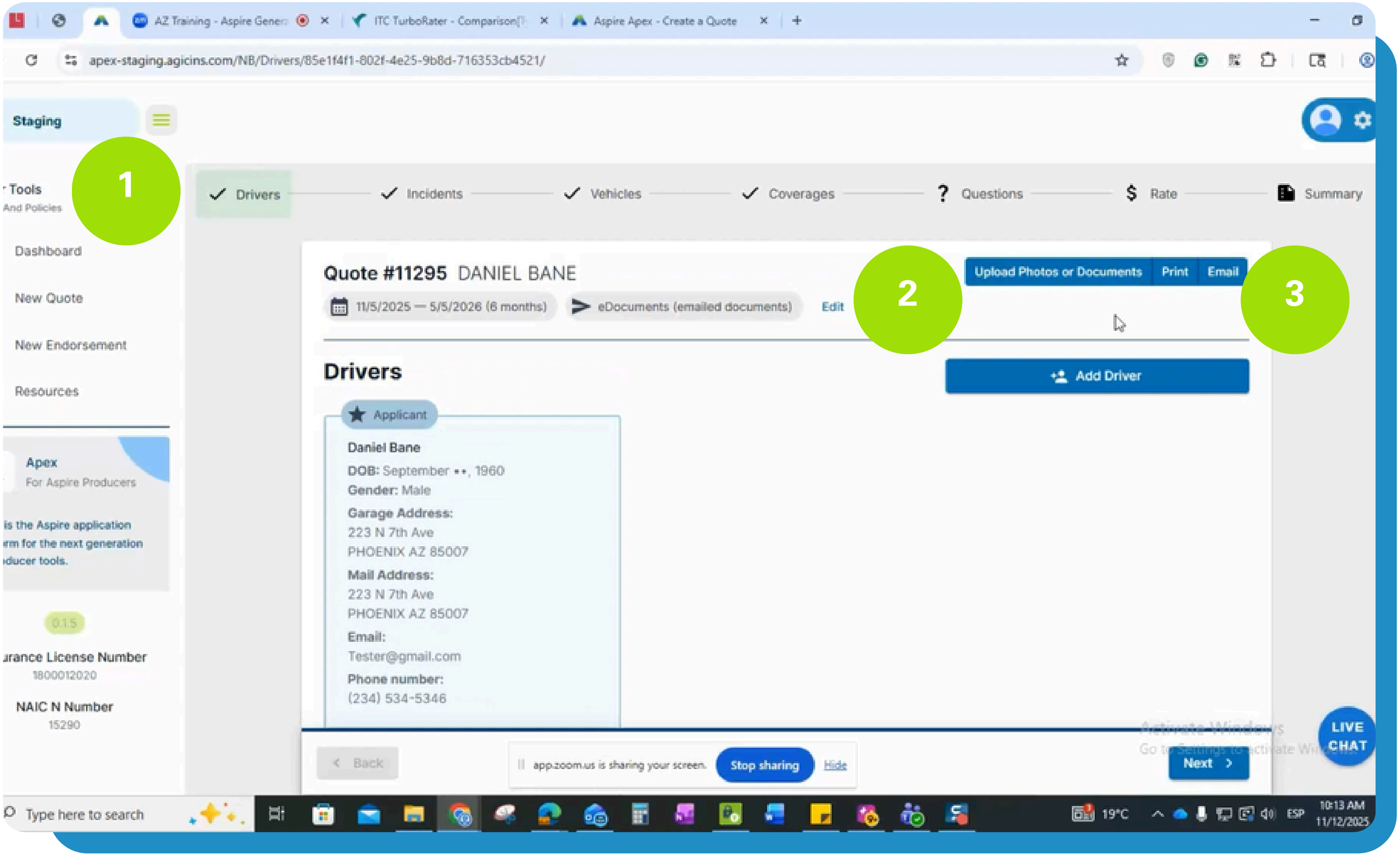
Follow these steps to add your Aspire Producer code to Turbo Rater:

1. Choose the state you are using.

2. Add your eight-digit producer code to see Aspire as an option for your new policy.

3. Enter your username and password, scroll down and select save and exit the screen.

Note: The process to add Aspire will be different in a different Rater. You can also sign up directly in the Aspire system by clicking **HERE**.



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After you bridge from your Rater, you will be taken to the quote page of the Aspire system. You will see our toolbar: Drivers, Incidents, Vehicles, Coverages, Questions, Rate, and Summary.

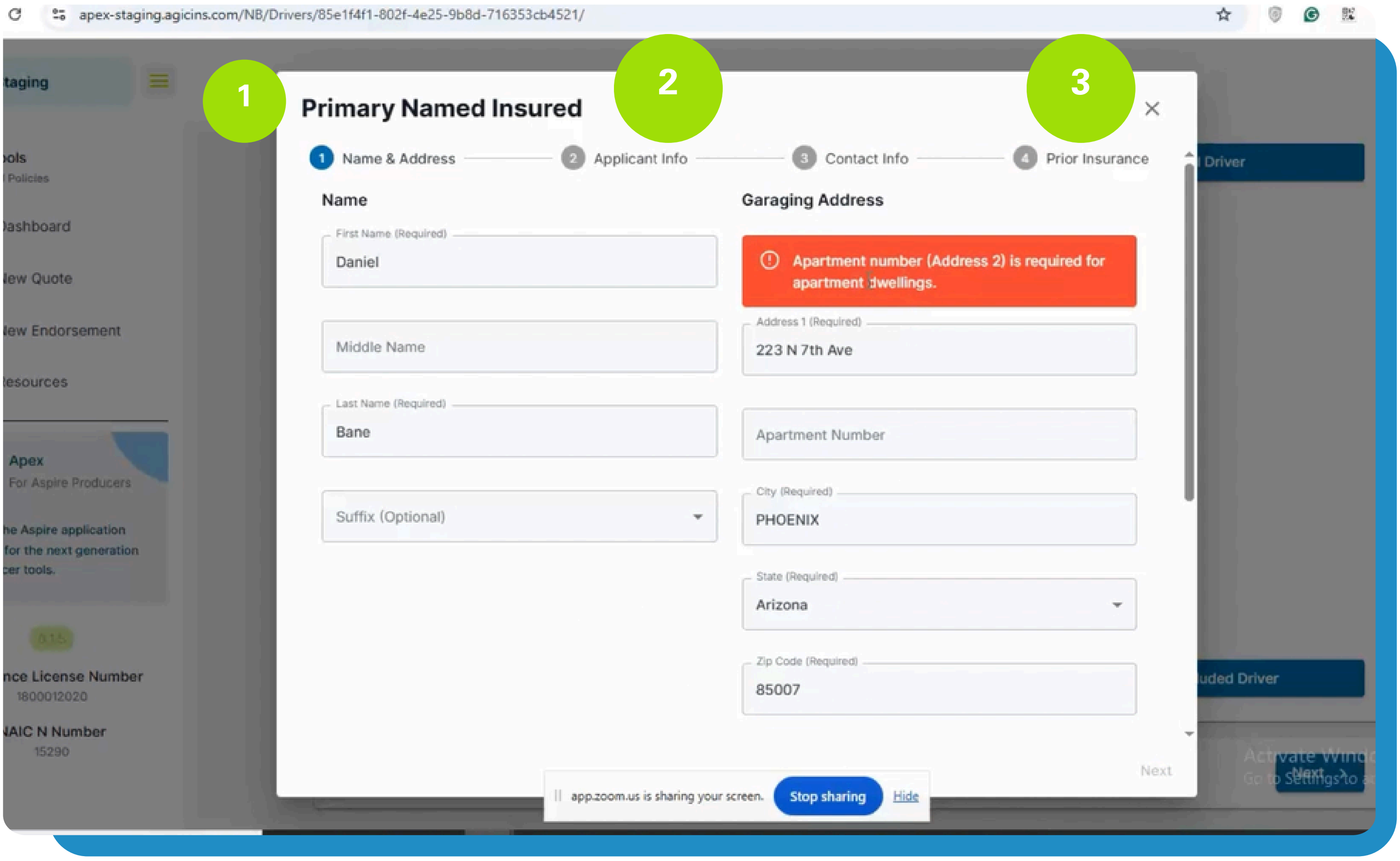
A green box indicates what tab you are currently in.

2

The "Edit" button next to the eDocuments button will allow you to change the delivery method to standard mail in the event your customer does not have an email address.

3

The print and email buttons allow you print out your quote, save it as a PDF, or email it to the customer.

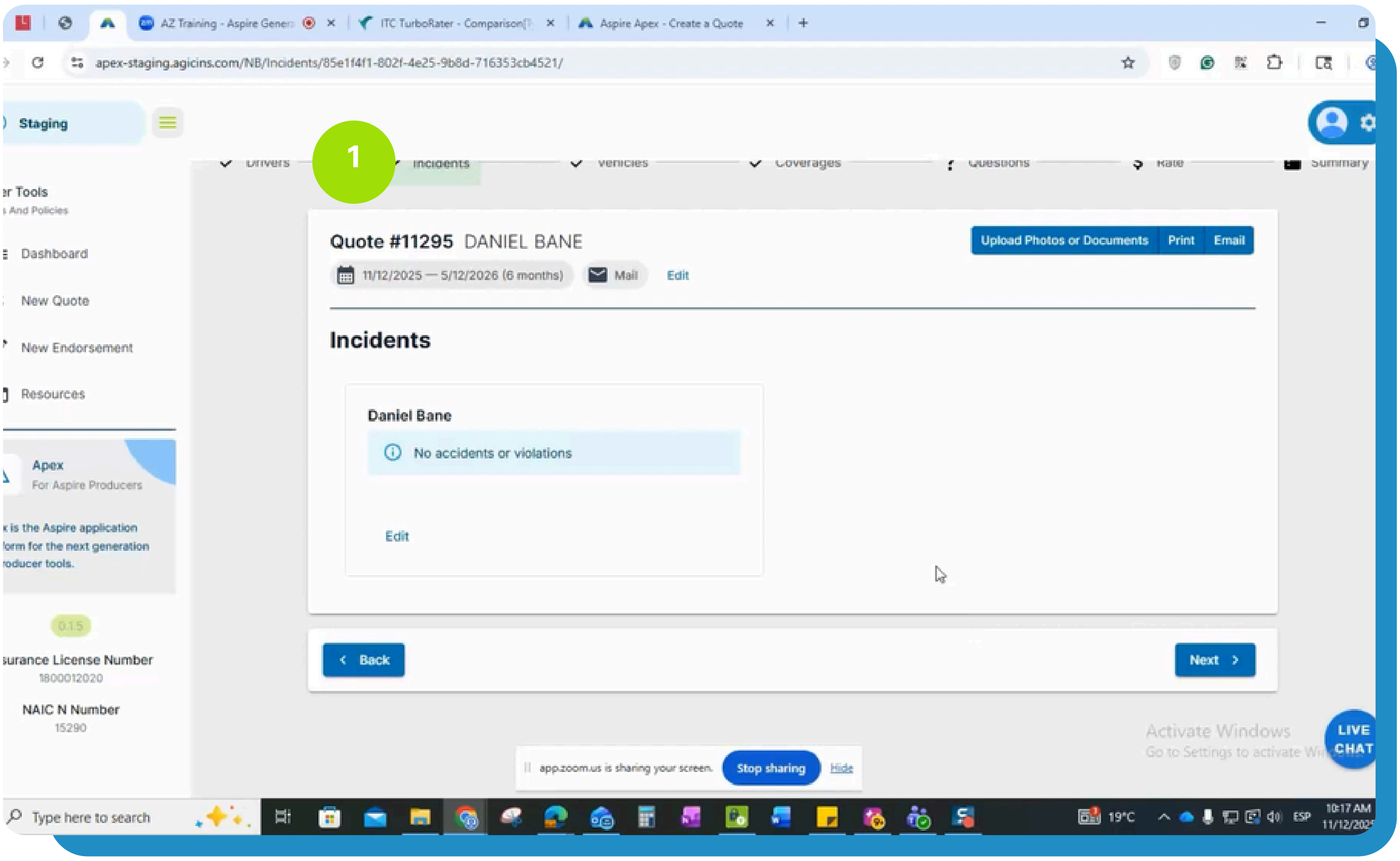


1. The Drivers tab will show all of the information that has been bridged over on the insured. If you click "Edit Primary Insured," you can review this information.

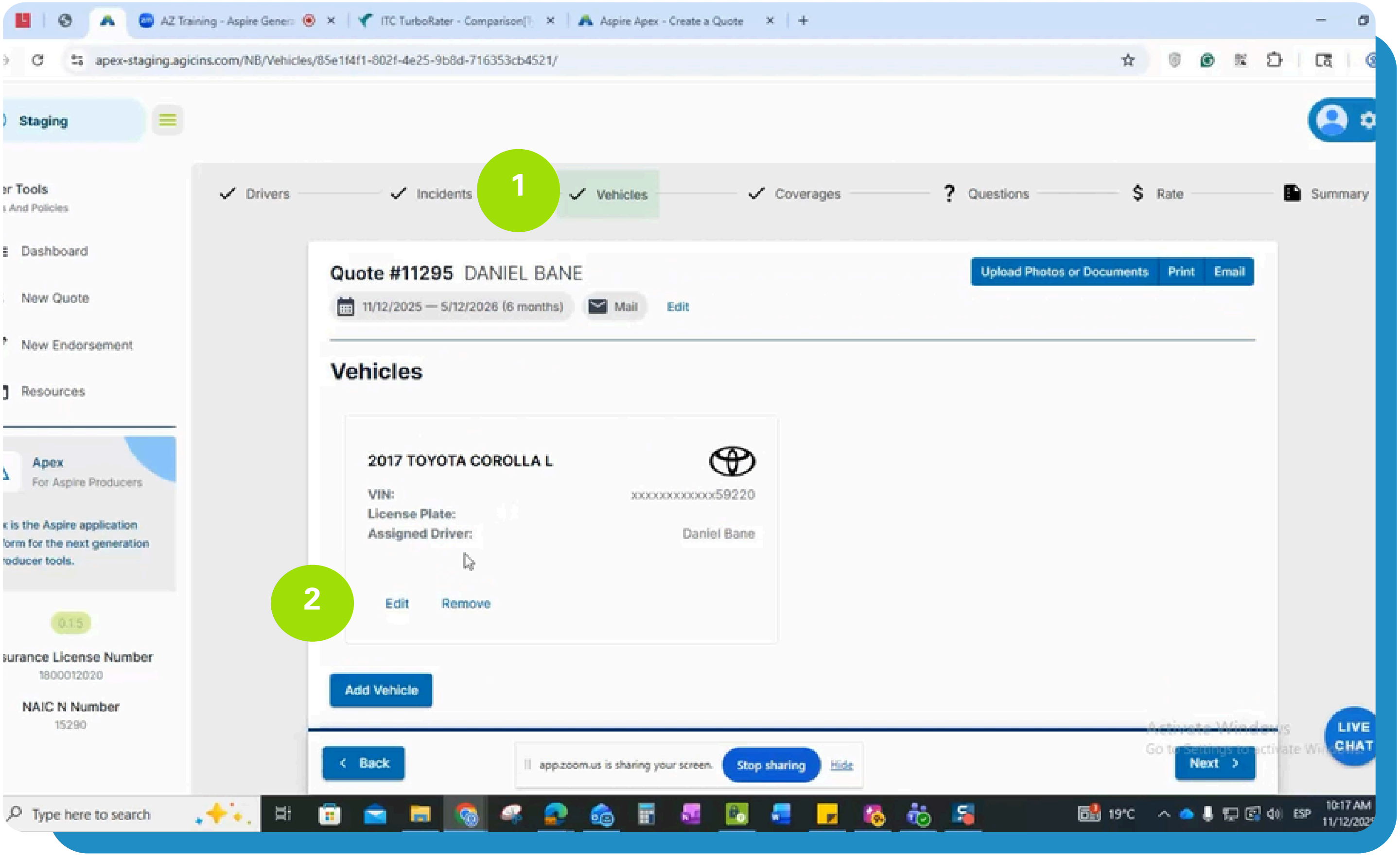
2. **The "Applicant Info" tab is where you can change the license type of the insured (US, International or ID Card).**

3. **The "Prior Insurance" tab will allow you to enter any policy information from previous carriers.**

Note: Any changes should be made in your Rater and then bridged over except license type.

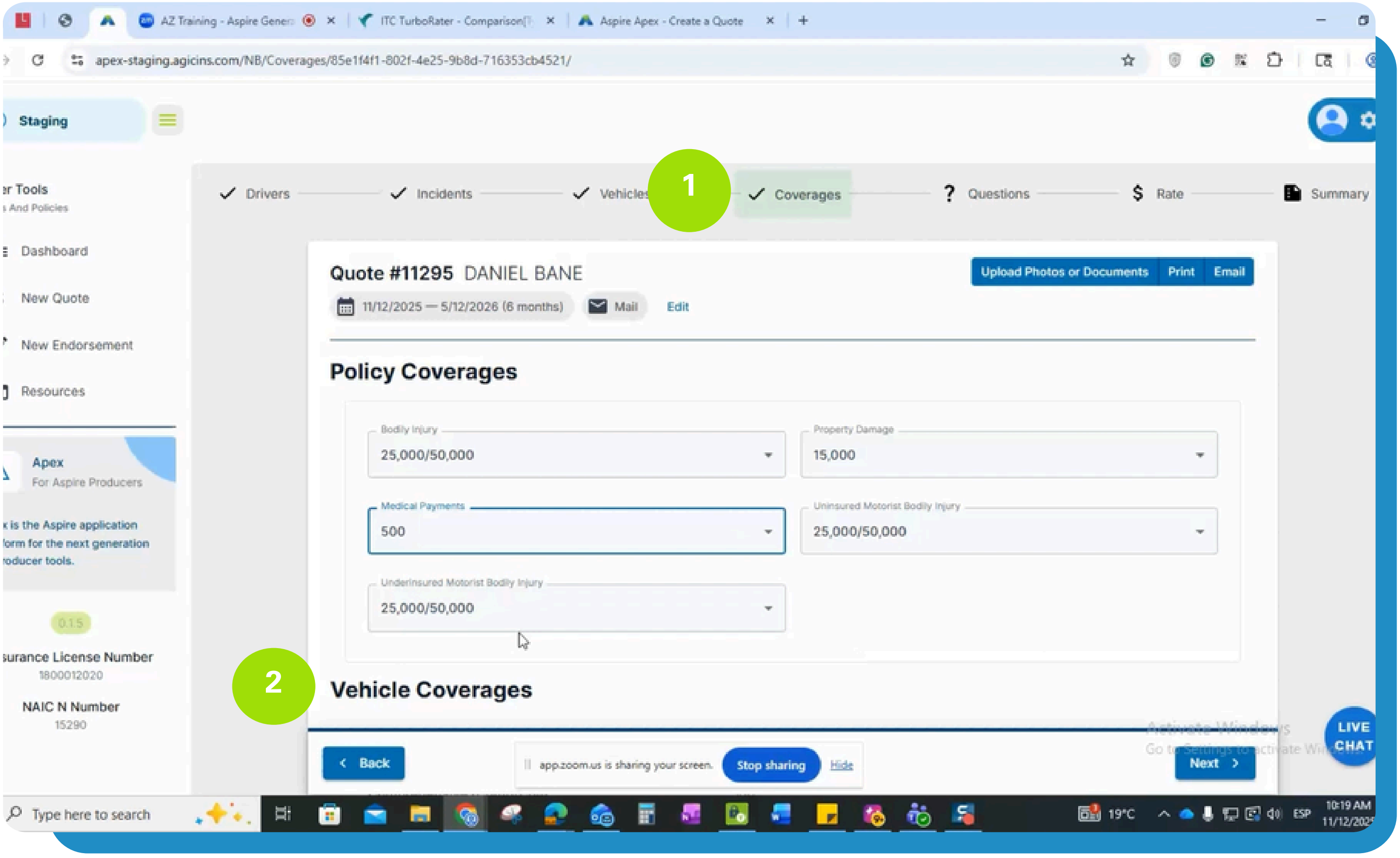


1 The “Incident” tab will display any accidents or violations in the customers history.



1 The "Vehicles" tab displays all the vehicles on the policy along with their associated information.

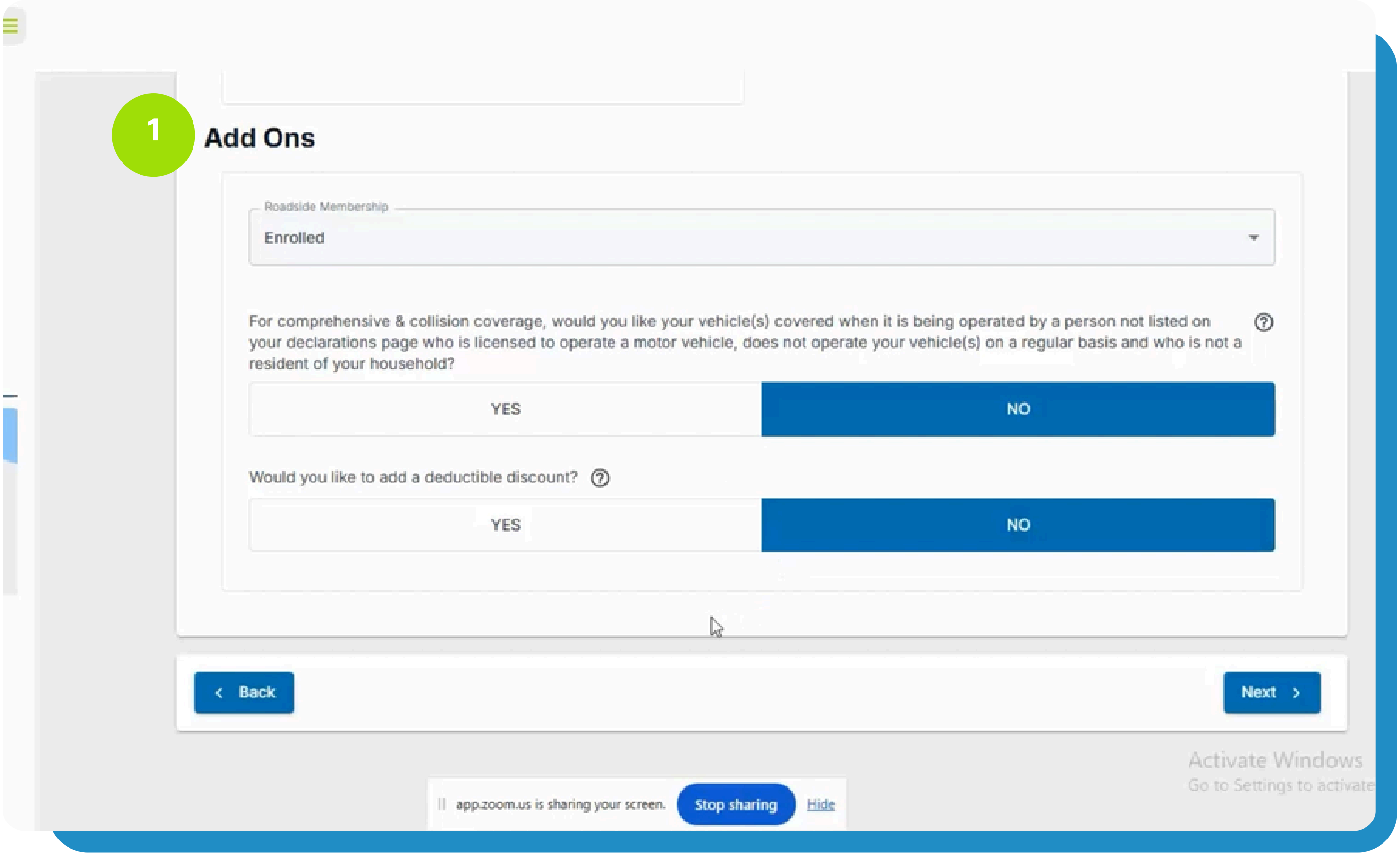
2 The edit button allows you to update information related to the car, such as: mileage, usage type, salvage, etc...



1 The "Coverages" tab will display all the coverages currently on the policy and allow you to make any required updates.

2 You can make updates to the vehicle coverage by clicking "edit coverage" under the "Vehicle Coverages" section.

Coverages is continued on the next page



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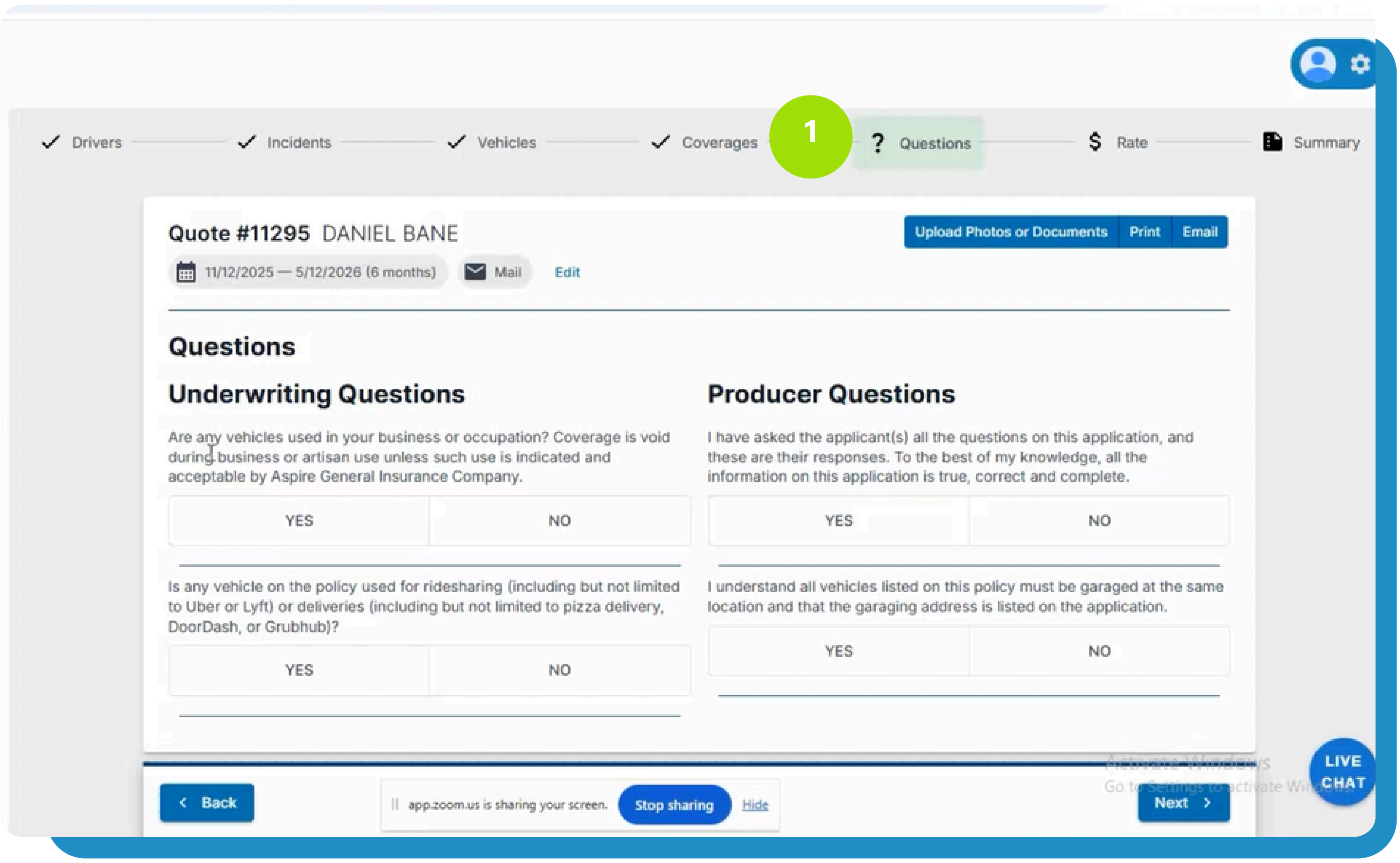
The "Add Ons" section will allow you to enroll in Roadside Membership, allow coverage for drivers not on the customers declaration page, and adding a deductible discount.



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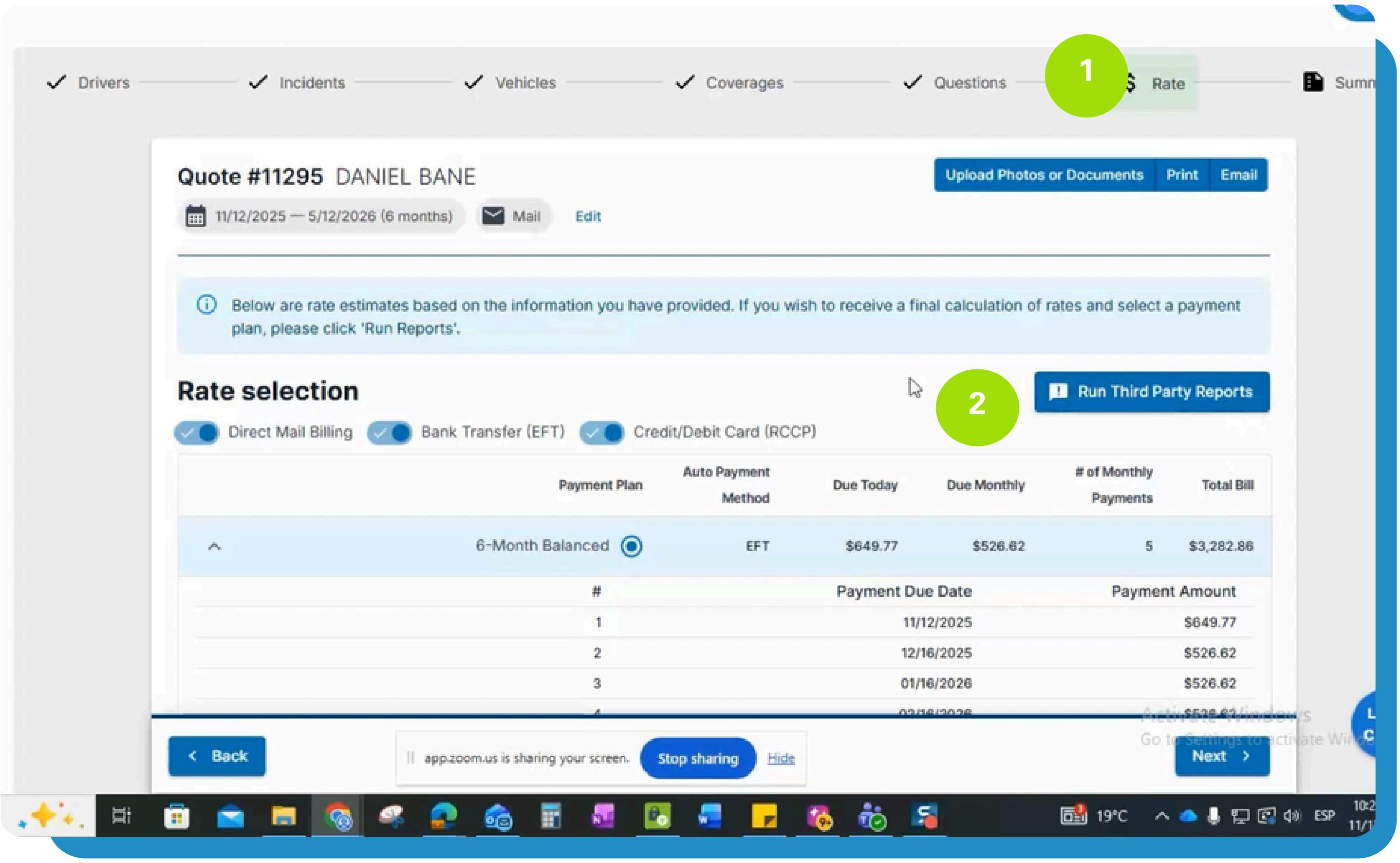
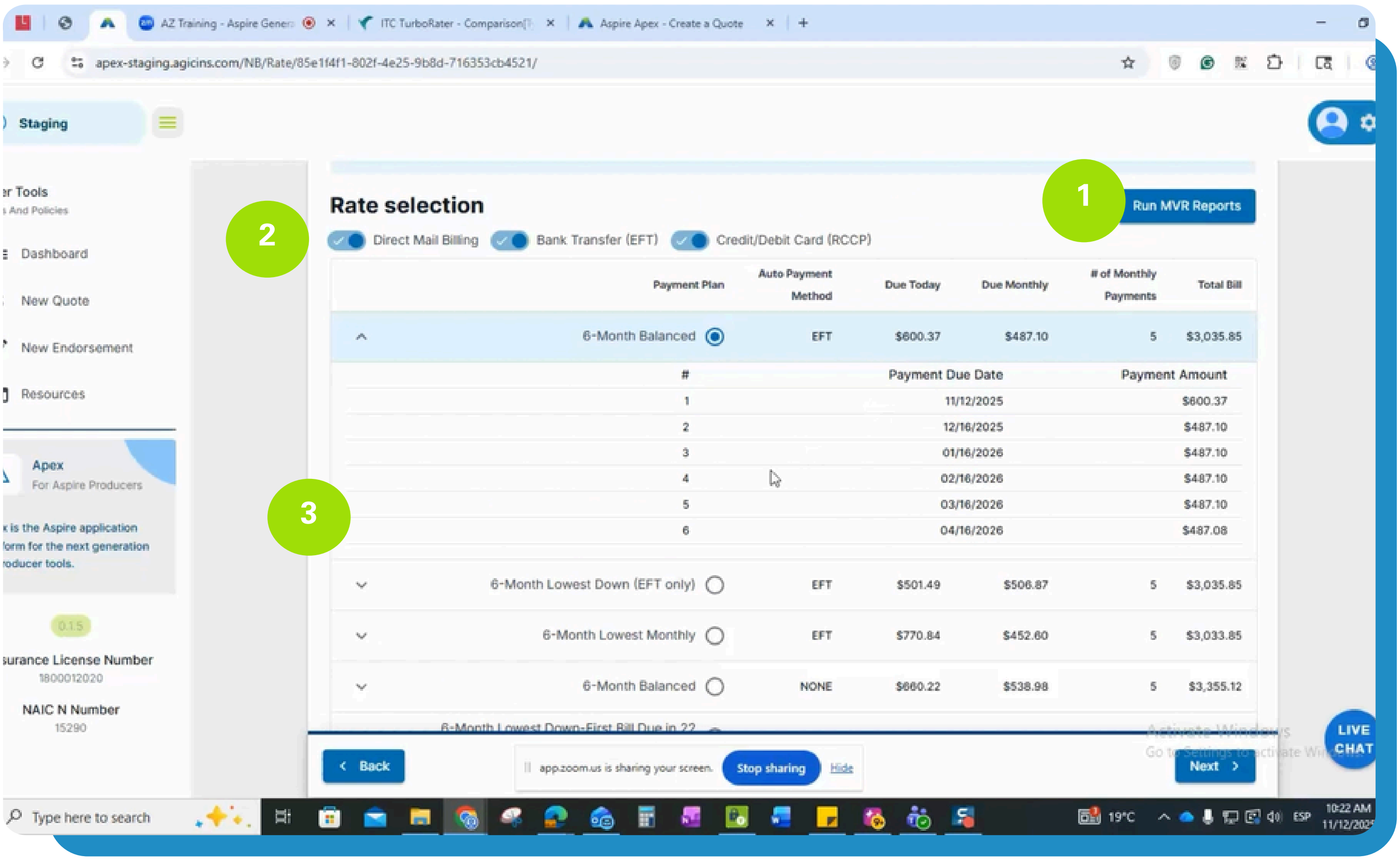
Please answer all questions under the "Underwriting Questions" and "Producer Questions" sections under this tab.



1 The "Rate" tab will allow you to run reports to create the most accurate rate for your customer and also display the rate and payment schedule.

2 The "Run Third Party Reports" button will run reports for: Prior insurance verification, undisclosed drivers, customer background reports and length of vehicle ownership.

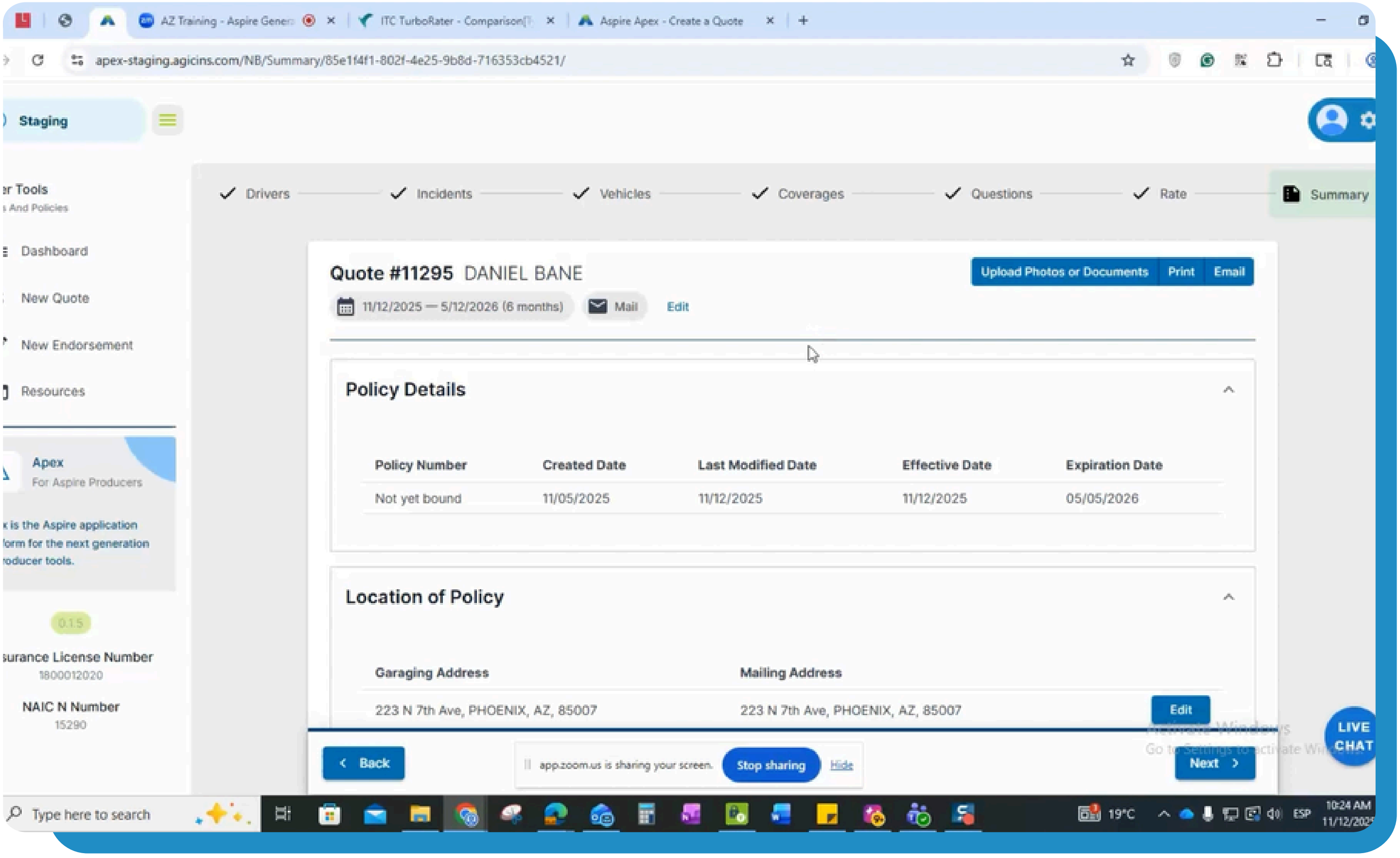
Rates is continued on the next page



1. After you run the third-party reports, you will be able to run the MVR reports by clicking the “Run MVR Reports” button.

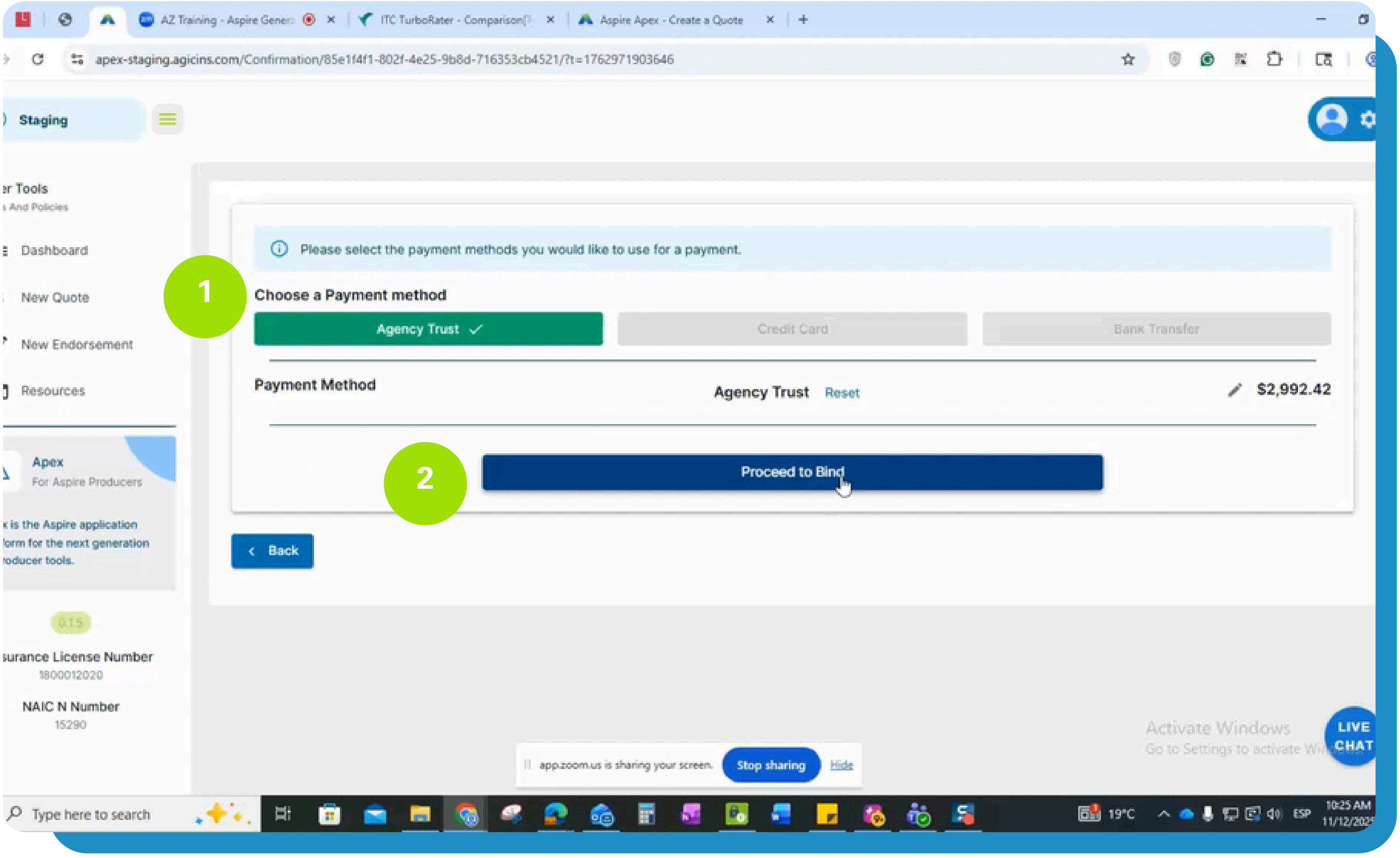
2. Select how your client would prefer to be billed: Direct Mail, Bank Transfer (EFT) or Credit/Debit Card (RCCP)

3. You can review and choose your rate. This section will display the down payment, and the payment schedule.



Summary Screen:

The summary screen allows you to review all the information from the previous tabs.



1. Choose how your customer would prefer to pay the down payment.

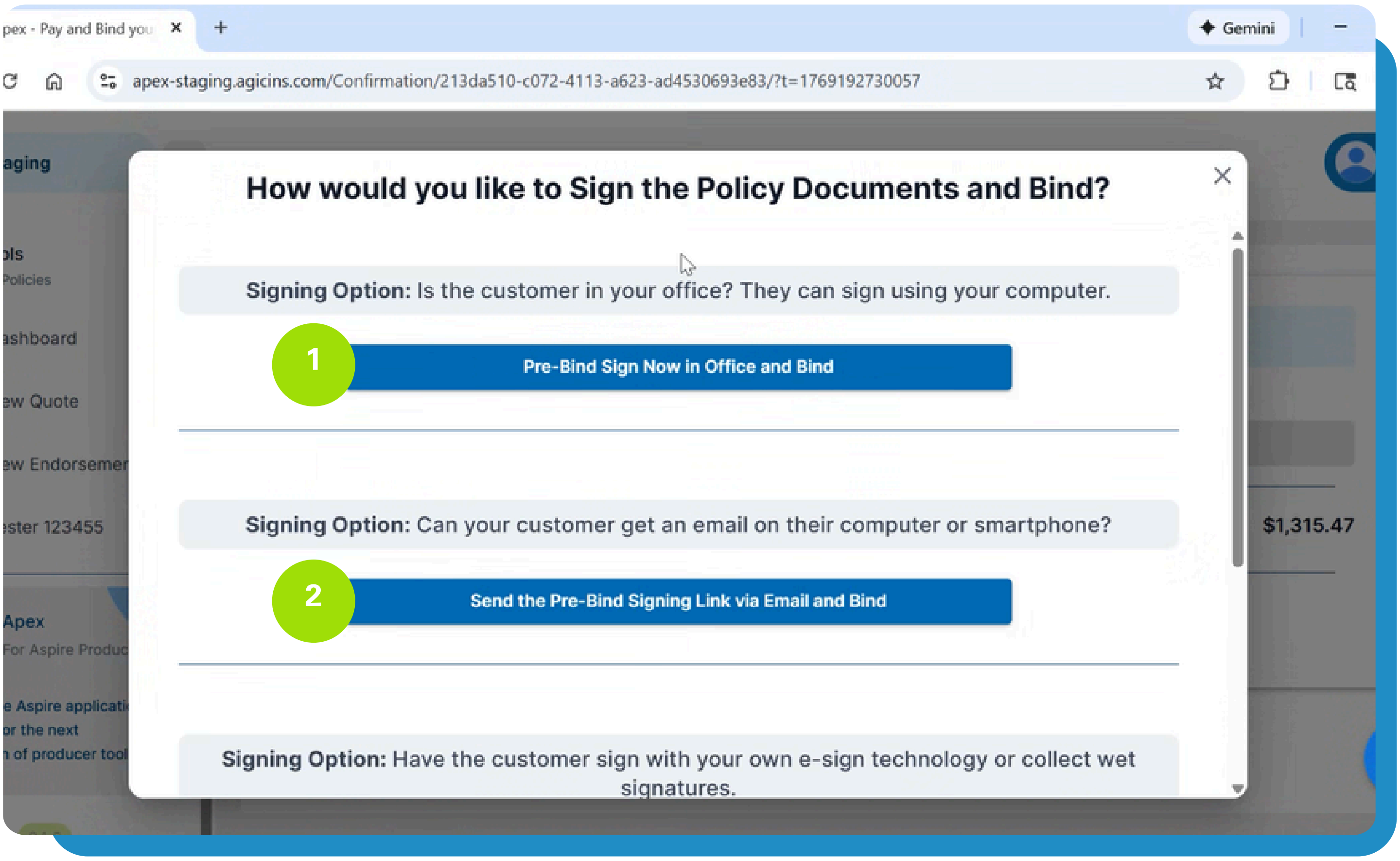
2. Click "Proceed to Bind" when the button appears (after choosing the payment method).

Bind Definitions:

The following information is essential to know when using Aspire insurance. The definitions for Pre and Bost Binding are below:

Pre-Bind: The policy is not considered bound until the client completes the e-signature process. The advantage is that all required signatures are collected upfront, with no follow-up needed.

Post-Bind: The policy is bound before signatures are collected, and it becomes the agency's responsibility to follow up and ensure the client completes the signing process.



There are three eSignature options that we would recommend:

1. **Pre-Bind (Sign in Office)**: Best used when the client is physically in your office. They can complete the e-signature process right there on your computer, ensuring everything is signed immediately.

2. **Pre-Bind (Signing Link via Email)**: Ideal when the client is working remotely or speaking with you by phone. You can send them a secure signing link that they can open on their phone or home computer to complete the e-signature process.

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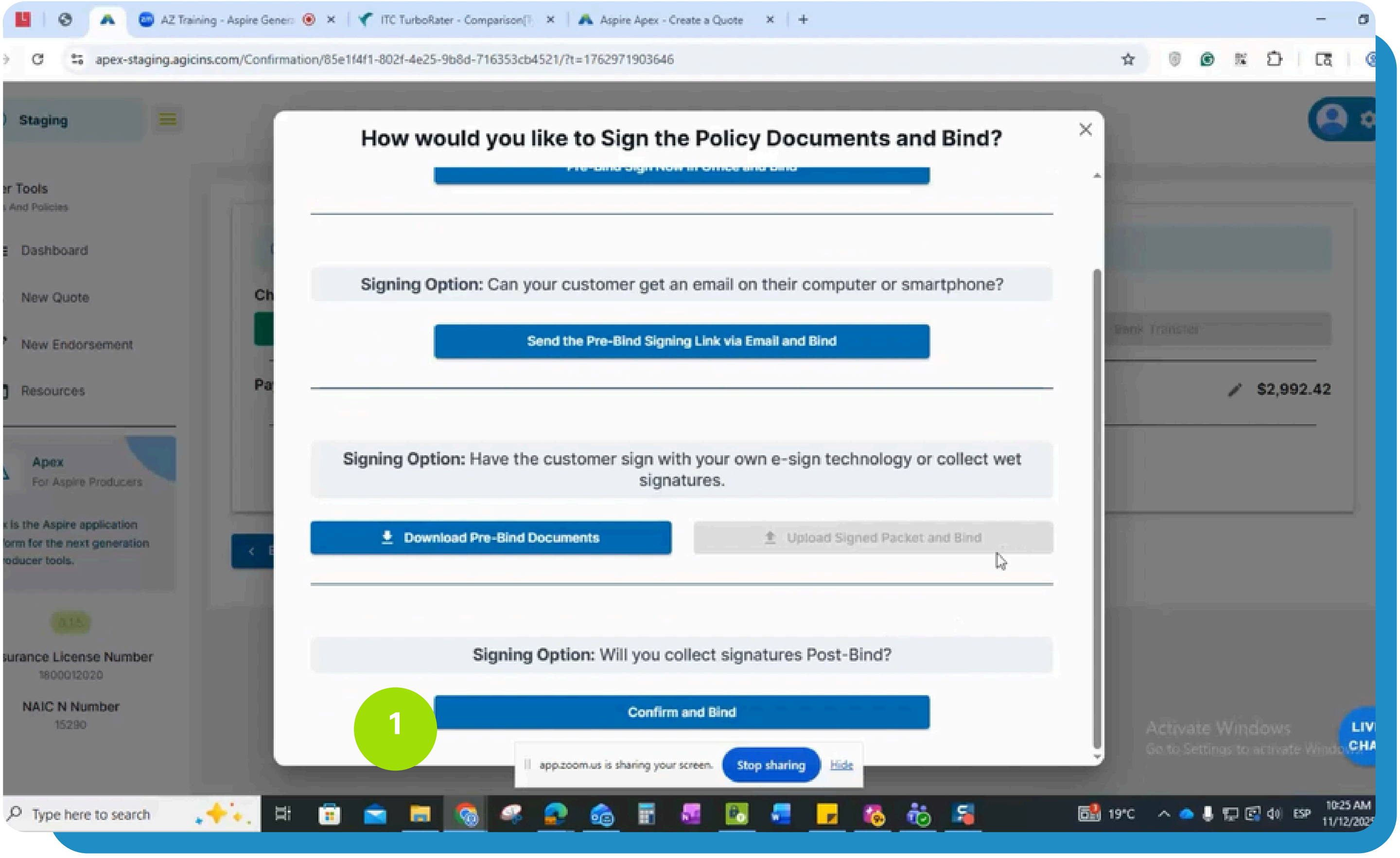
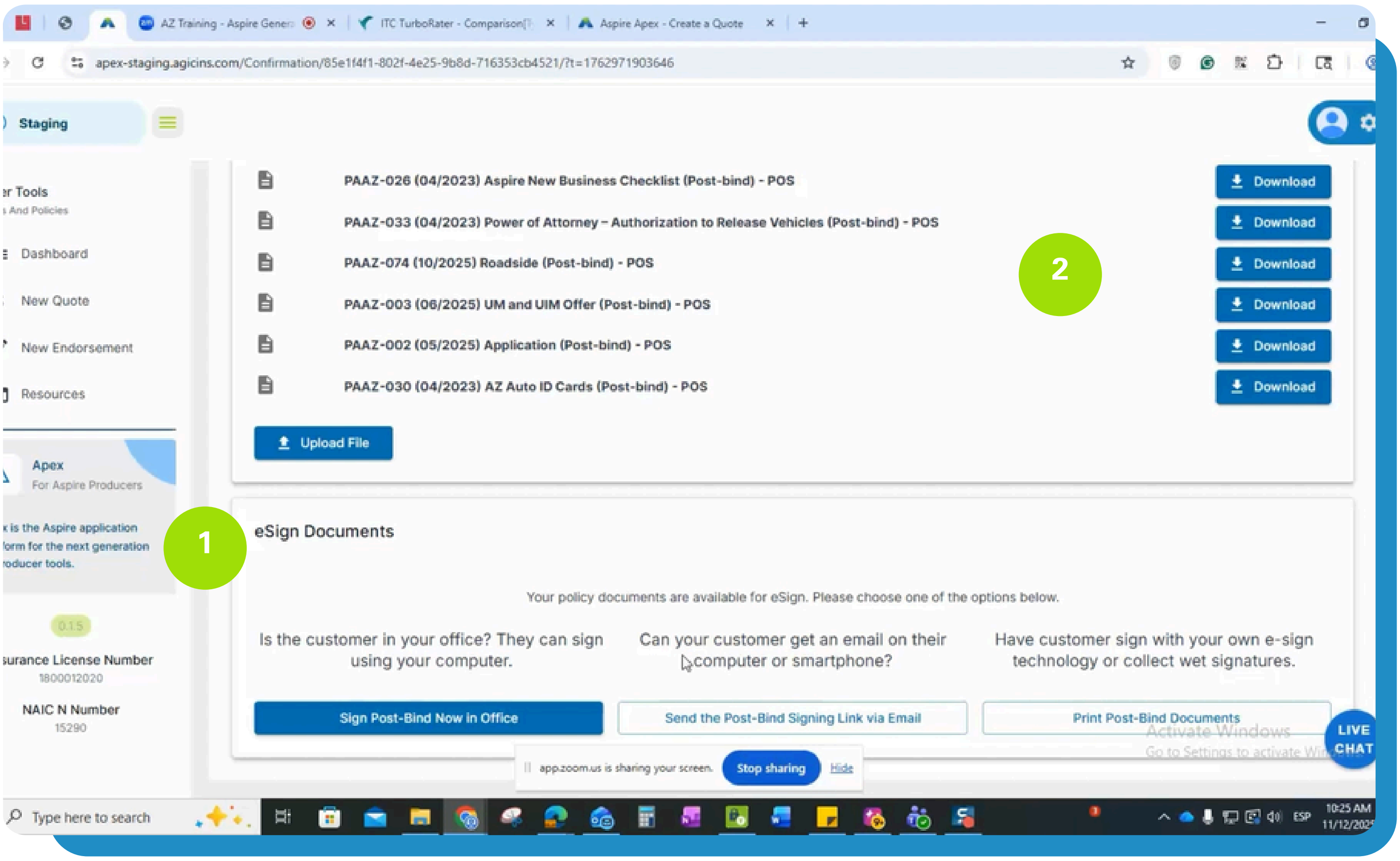


1 **Confirm and Bind**: Use this option when you need to print the application for a physical signature or if you prefer to collect signatures using your own e-signature platform.



1. There are three options to sign the documents. Please choose the most convenient for you and your customer.

2. All documents relating to the policy are available to be downloaded on this final screen.