



TIPS AND FACTS

Issue 2

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How to Use Filters When Servicing Policies

Renew

After accessing **Servicing > Renewal > selecting the expiring policy**, use the **[Show]** link located in the upper right corner of the screen to select a specific range of policies. Note the **Policy Stage** list on the right side of the search screen may be changed to include or exclude marketing policies. By default marketing and policies in history are excluded. Specific date ranges may be entered to narrow down the list of policies displayed. Once the selections have been made, click **Search** to display the filtered policies. If the expiring policy's **Mode** is **New**, it can be used again by selecting **New** from the **Renewal Policy Mode** list located on the left above the **Search** filters. Choose the version of policy to renew and click the **[Next]** link to create the future version of the policy.

The screenshot shows the 'servicing' interface for a 'Commercial Account' named 'Busy Bee Crafts and Supplies'. The 'Renewal Policy Mode' is set to 'Renew'. Search filters include Policy Number, Term Eff. Date (Fr/To), Term Exp. Date (Fr/To), Updated By, Policy Modes (All), Term Exp. Date (Fr/To), Policy Status (All), Cvg. Eff. Date (Fr/To), Cvg. Exp. Date (Fr/To), Issuing Carrier, Cvg. Exp. Date (Fr/To), Billing Carrier, Updated Date (Fr/To), Updated Date (To), Policy Stage (Exclude Marketing), and Include History (No). Sort filters are set to Line of Business, Ascending, Eff Date, and Ascending. The table below shows the results:

Select	Line Of Business	Policy Number	Stage Status Description	Mode	Updated By Updated Date	Annualized \$ Billed Premium	Policy Term	Coverage Term	Issuing Carrier Billing Carrier
<input type="checkbox"/>	Auto - Commercial	BA-87654-1	Policy In Force TX Auto	Renew	Mary Oberleitner 09/18/2008	\$0.00 / \$0.00	01/02/2009 / 01/02/2010	01/02/2009 / 01/02/2010	Connecticut Mutua Connecticut Mutua
<input checked="" type="checkbox"/>		11032008	Policy In Force	New	Jay R Brandon 11/03/2008	\$0.00 / \$0.00	11/03/2008 / 11/03/2009	11/03/2008 / 11/03/2009	Penn National Penn National
<input type="checkbox"/>	Auto - Personal					\$0.00 / \$0.00			
<input type="checkbox"/>	Homeowners					\$0.00 / \$0.00			

Fact: If the issuing or billing carrier is changed on the header on the underwriting screen of a policy with a future status and **Save Changes** is selected on the **Navigation Toolbar**, the policy **Mode** changes to **Re-New-Co**. This indicates a renewal to the agency but new to the carrier.



TIPS AND FACTS

Edit

After accessing **Servicing > Edit**, use the **[Show]** link located in the upper right corner of the screen to select a specific range of policies. Note the **History** list on the right side of the search screen may be changed to include or exclude history policies. By default history policies are excluded. Specific date ranges may be entered to narrow down the list of policies displayed. Once the selections have been made, click the **Search** button to display the filtered policies. Choose the version of the policy to edit and click the **Generate Edit** button to create the pending edit for the policy.

CLIENT PROFILE | OPPORTUNITIES | MARKETING | POLICIES | CLAIMS | **SERVICING** | ATTACHMENTS | ACTIONS | TRANSACTIONS | DELIVERY | T-LOG

Client Name: Busy Bee Crafts and Supplies Commercial Account

servicing

This option is used to make changes or corrections that do not require a change request.

Enter the effective date of the edit: 11/19/2009 Generate Edit

Enter a brief description of the edit:

Note: This information will populate the action description field.

Enter additional notes to populate the action memo section:

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Search Filters Filters: [Hide]

Policy Number: Term Eff. Date (Fr): Term Eff. Date (To): Updated By:

Policy Mode: All Policy Status: All Term Exp. Date (Fr): Term Exp. Date (To): Cvg. Eff. Date (Fr): Cvg. Eff. Date (To): Cvg. Exp. Date (Fr): Cvg. Exp. Date (To): History: Exclude History Include History Exclude History History Only

Issuing Carrier: Billing Carrier: Updated Date (Fr): Updated Date (To):

Sort Filters

Sort Field 1: Line of Business Sort Order 1: Ascending Sort Field 2: Eff Date Sort Order 2: Ascending

Search Clear

Select policy to edit:

Select	Line Of Business Policy Number	Stage Status Description	Mode	Updated By Updated Date	Annualized \$ Billied \$	Policy Term	Coverage Term	Issuing Carrier Billing Carrier
<input type="radio"/>	Auto - Commercial BA-87654-1	Policy In Force TX Auto	Renew	Mary Oberleitner 09/18/2008	\$0.00	01/02/2009 01/02/2010	01/02/2009 01/02/2010	Connecticut Mutus Connecticut Mutus
<input type="radio"/>	(Auto - Personal (11032008	Policy In Force	New	Jay R Brandon 11/03/2008	\$0.00	11/03/2008 11/03/2009	11/03/2008 11/03/2009	Penn National Penn National
<input type="radio"/>	Equipment Floate EQ-90876-1	Policy In Force Forklift Policy	Renew	Mary Oberleitner 03/23/2009	\$0.00	01/07/2009 01/07/2010	03/23/2009 05/22/2009	Connecticut Mutus Connecticut Mutus
<input type="radio"/>	(Equipment Floate Cpp-908765-A	Policy In Force Special Package	Renew	Mary Oberleitner 03/18/2009	\$7,250.00	01/02/2009 01/02/2010	01/02/2009 01/02/2010	Fireman's Fund In Fireman's Fund In
<input type="radio"/>	(Equipment Floate Cpp-908765-A	Endorsement Pending	Renew	Mary Oberleitner 10/09/2009	\$500.00	01/02/2009 01/02/2010	02/02/2009 01/02/2010	Fireman's Fund In Fireman's Fund In

Tip: Leaving a pending edit on the policy allows it to be tracked on the **Home > Edit** page until it is either aborted or posted.



TIPS AND FACTS

Cancel

After accessing **Servicing > Cancellation**, use the **[Show]** link located in the upper right corner of the screen to select a specific range of policies. Note the **Policy Number** box on the left side of the search screen is an entry field that when utilized will lookup policies with the specific number entered. The default policy lookup includes the coverage date range entered in the date field on the Servicing screen to the right of the description box. Enter in a policy number or line of business to narrow down the list of policies displayed. After making selections, click on the **Search** button to display the filtered policies. Choose the version of the policy to Cancel and then click the **Generate Cancellation** button to create the pending Cancellation for the policy.

CLIENT PROFILE | OPPORTUNITIES | MARKETING | POLICIES | CLAIMS | SERVICING | ATTACHMENTS | ACTIONS | TRANSACTIONS | DELIVERY | T-LOG

Client Name: Busy Bee Crafts and Supplies Commercial Account

servicing

Services
Marketing
Market Analysis
Binders
Edit
Endorsement
Renewal
Cancellation
Claim
Audit
New Certificate(s)
Renewal Certificate(s)
Verification(s)

This option is used to generate a cancellation form and/or indicate a policy is pending cancellation or has been cancelled. Generate Cancellation

Enter the cancellation effective date: 11/19/2009

Enter a brief description of the cancellation: Process cancellation.

Enter additional notes to populate the action memo: Process cancellation.

Select cancellation method: Pro-Rata

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Search Filters

Policy Number: Term Eff. Date (Fr): 01/02/2009 Term Eff. Date (To): 10/08/2009 Updated By: Save Filter Settings

Policy Mode: All Term Exp. Date (Fr): 01/02/2010 Term Exp. Date (To): 10/08/2010 LOB:

Policy Status: All Cvg. Eff. Date (Fr): Cvg. Eff. Date (To):

Issuing Carrier: Cvg. Exp. Date (Fr): Cvg. Exp. Date (To):

Billing Carrier: Updated Date (Fr): Updated Date (To):

Sort Filters

Sort Field 1: Eff Date Sort Order 1: Ascending Sort Field 2: Coverage Exp Date Sort Order 2: Ascending

Select policy for cancellation:

Select	Line Of Business Policy Number	Stage Status Description	Mode	Updated By Updated Date	Annualized \$ Billed \$	Policy Term	Coverage Term	Issuing Carrier Billing Carrier
<input type="radio"/>	Auto - Commercial BA-87654-1	Policy In Force TX Auto	Renew	Mary Oberleitner 09/18/2008	\$0.00 \$0.00	01/02/2009 01/02/2010	01/02/2009 01/02/2010	Connecticut Mutus Connecticut Mutus
<input type="radio"/>	Equipment Floate Ccp-906765-A	Policy In Force Special Package	Renew	Mary Oberleitner 03/18/2009	\$7,250.00 \$0.00	01/02/2009 01/02/2010	01/02/2009 01/02/2010	Fireman's Fund In Fireman's Fund In
	Equipment Floate				\$500.00 / \$0.00			
	General Liability -				\$2,500.00 / \$0.00			
	Glass and Sign				\$250.00 / \$0.00			

Tip: Leaving a pending Cancellation on the policy allows it to be tracked on the **Home > Cancellation** page until it is either aborted or posted.

Fact: Posted cancellations may be reinstated or rewritten from policy history by clicking the **Details** icon and then selecting the **Reinstate** or **Rewrite** links on the **Navigation Toolbar**.



TIPS AND FACTS

Claim

After accessing **Servicing > Claim**, use the **[Show]** link located in the upper right corner of the screen to select a specific range of policies. Note the **History** list on the right side of the search screen may be changed to include or exclude History policies. By default history policies are included and the default policy lookup is determined by the line of business selected and the date entered in the date field located on the Servicing screen to the right of the description box. After making selections, click on the **Search** button to display the filtered policies. Choose the policy the Claim will be added to and then click the **[Next]** link to create the pending Claim for the policy.

CLIENT PROFILE | OPPORTUNITIES | MARKETING | POLICIES | CLAIMS | **SERVICING** | ATTACHMENTS | ACTIONS | TRANSACTIONS | DELIVERY | T-LOG

Client Name: Busy Bee Crafts and Supplies Commercial Account

servicing

- Services
- Marketing
- Market Analysis
- Binders
- Edit
- Endorsement
- Renewal
- Cancellation
- Claim
- Audit
- New Certificate(s)
- Renewal Certificate(s)
- Verification(s)

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Filters: [Hide] [Back] [Next] Save Filter Settings

Search Filters

Policy Number: Term Eff. Date (Fr): Term Eff. Date (To): Updated By:

Policy Mode: Term Exp. Date (Fr): Term Exp. Date (To): History:

Policy Status: Cvg. Eff. Date (Fr): Cvg. Eff. Date (To):

Issuing Carrier: Cvg. Exp. Date (Fr): Cvg. Exp. Date (To):

Billing Carrier: Updated Date (Fr): Updated Date (To):

Sort Filters

Sort Field 1: Sort Order 1: Sort Field 2: Sort Order 2:

Search Clear

Select	Line Of Business	Policy Description	Stage Status	Mode	Updated By	Annualized \$ Billed	Policy Term	Coverage Term	Issuing Carrier
<input type="radio"/>	Auto - Commercial	BA-87654-1	Policy Renewed TX Auto	New	Mary Oberleitner 01/23/2008	\$0.00	01/02/2008	01/02/2008	Connecticut Mutus
<input type="radio"/>	Auto - Commercial	BA-87654-1	Policy In Force TX Auto	Renew	Mary Oberleitner 01/23/2008	\$0.00	01/02/2009	01/02/2009	Connecticut Mutus
<input type="radio"/>	Auto - Commercial	BA-87654-1	Policy In Force TX Auto	Renew	Mary Oberleitner 09/18/2008	\$0.00	01/02/2009	01/02/2009	Connecticut Mutus
<input type="radio"/>	Auto - Commercial	BA-87654-1	Policy Renewed TX Auto	New	Mary Oberleitner 03/18/2009	\$0.00	01/02/2008	01/02/2008	Connecticut Mutus

Tip: Leaving a pending Claim on the policy allows it to be tracked on the **Home > Claim** page until it is either aborted or posted.



TIPS AND FACTS

Audit

After accessing **Servicing > Audit**, use the **[Show]** link located in the upper right corner of the screen to select a specific range of policies. Note the **History** list on the right side of the search screen may be changed to include or exclude History policies. By default history policies are excluded and the default policy lookup is determined by the date entered on the date field located on the Servicing screen to the right of the description box. After making selections, click the **Search** button to display the filtered policies. Choose the policy the Audit will be added to and then click the **Generate Audit** button to create the pending Audit for the policy.

CLIENT PROFILE | OPPORTUNITIES | MARKETING | POLICIES | CLAIMS | **SERVICING** | ATTACHMENTS | ACTIONS | TRANSACTIONS | DELIVERY | T-LOG

Client Name: Busy Bee Crafts and Supplies Commercial Account

servicing

This option is used to record audit information.

Enter the effective date of the audit:

Enter a brief description of the audit:

Enter additional notes to populate the action memo:

[Generate Audit](#)

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Search Filters Filters: [Hide](#)

Policy Number: Term Eff. Date (Fr): Term Eff. Date (To): Updated By:

Policy Mode: Term Exp. Date (Fr): Term Exp. Date (To): LOB:

Policy Status: Cvg. Eff. Date (Fr): Cvg. Eff. Date (To): History:

Issuing Carrier: Cvg. Exp. Date (Fr): Cvg. Exp. Date (To):

Billing Carrier: Updated Date (Fr): Updated Date (To):

Sort Filters

Sort Field 1: Sort Order 1: Sort Field 2: Sort Order 2:

[Search](#) [Clear](#)

Select policy to be audited:

Select	Line Of Business Policy Number	Stage Status Description	Mode	Updated By Updated Date	Annualized \$ Billed \$	Policy Term	Coverage Term	Issuing Carrier Billing Carrier
<input type="radio"/>	Auto - Commercial BA-87654-1	Policy In Force TX Auto	Renew	Mary Oberleitner 09/18/2008	\$0.00 \$0.00	01/02/2009 01/02/2010	01/02/2009 01/02/2010	Connecticut Mutus Connecticut Mutus
<input type="radio"/>	Equipment Floate EQ-90876-1	Policy In Force Forklift Policy	Renew	Mary Oberleitner 03/23/2009	\$0.00 \$0.00	01/07/2009 01/07/2010	03/23/2009 05/22/2009	Connecticut Mutus Connecticut Mutus
<input type="radio"/>	(Equipment Float) Ccp-908765-A	Policy In Force Special Package	Renew	Mary Oberleitner 03/18/2009	\$7,250.00 \$0.00	01/02/2009 01/02/2010	01/02/2009 01/02/2010	Fireman's Fund In Fireman's Fund In
<input type="radio"/>	(Equipment Float) Ccp-908765-A	Endorsement Pending Special Package	Renew	Mary Oberleitner 10/09/2009	\$500.00 \$0.00	01/02/2009 01/02/2010	02/02/2009 01/02/2010	Fireman's Fund In Fireman's Fund In
<input type="radio"/>	Umbrella - Comm UM-90888	Policy In Force	New	Mary Oberleitner 10/08/2009	\$4,500.00 \$4,500.00	10/08/2009 10/08/2010	10/08/2009 10/08/2010	Gulf Management Gulf Management

Tip: Make sure to update the pending Audit to include the results of the audit. Leaving a pending Audit on the policy allows it to be tracked on the **Home > Audit** page until it is either aborted or posted.