

Policy Servicing Quick Start

Service	Option	Description	Method/LOB	Eff. Date/Date of Loss	Certificate Info	Select Existing Application	Populate Header	Add Application	Bridge/Rate/Export	Populate Form	Print	Certificate Holders	Policy Info	Status	Claims Tab	Post/Issue All/Close	In Force/Finalize
Marketing New	Marketing - New line of business.	Enter the details in the Description field.	N/A	Enter the projected effective date of the policy in the Eff. Date field.	N/A	N/A	Enter the necessary info. Click Save Changes .	If the [Add Application] link is not present, click the Save Changes link to activate. Click the link. Select the LOB. Click OK .	Click the link for Homeowners or Personal Auto to rate.	Use the Navigation Tree or List. Must open the form from the tree to select list.	Click the Print link to print or preview.	N/A	Click the policy info tab and enter the quote when received.	N/A	N/A	N/A	N/A
Remarketing	Marketing - Existing line of business.	Enter the details in the Description field.	N/A	N/A. The effective date placed on the header is automatically the expiration date of the expiring policy selected.	N/A	Use Search Filters if the policy is not displayed.	Enter the necessary info. Click Save Changes .	Click the [Add Application] link only if a new LOB is being added.	Click the link for Homeowners or Personal Auto to rate.	Use the Navigation Tree or List. Must open the form from the tree to select list.	Click the Print link to print or preview.	N/A	Click the policy info tab and enter the quote when received.	N/A	N/A	N/A	N/A
Coverage Comparison	Market Analysis	N/A	N/A	N/A	N/A	Use Search Filters if policies are not displayed. History policies may be included. The first policy selected is identified as the source policy and is used to compare to the other added policies.	Enter the necessary info. Click Save Changes .	Click the Add Existing link to add other policies to the existing analysis.	Click the Export link to export the Line of Business to: Microsoft® Word or Microsoft® Excel.	Modify the applications as necessary. The analysis will be updated to include changes regardless of analysis status.	N/A	N/A	N/A	Use the Status drop-down box in the header to change the status for the analysis.	N/A	Click the Close link to return to the Marketing Analysis Summary screen.	Click Finalize when a policy in the analysis has been selected as the winner. Select a winner from the available options. Use the drop-down box to select the reason for selection and enter a description. Click the Finalize button and confirm. Unselected marketing policies are sent to history while the winner is marked with a blue ribbon. This version remains active on the summary until placed in force or chosen in the renewal process.
Add Binder	Binders	N/A	N/A	Enter the binder effective date in the Eff. Date field.	N/A	Use Search Filters if the policy is not displayed.	Edit the Coverage Term to reflect the Binder Term if outside of the default term.	N/A	N/A	Check to ensure all necessary data is on the binder and update as needed.	Click the Print link to print or preview	N/A	N/A	N/A	N/A	N/A	N/A
Edit Policy	Edit	Enter the details in the Description field.	N/A	The Eff. Date field uses the current date by default, only modify this date if necessary.	N/A	Use Search Filters if the policy is not displayed. History policies may be included.	The policy number may need to be added/edited. Carriers may not be changed if posted invoices are present.	Click the [Add Application] link only if a new LOB is being added.	N/A	Use the Navigation Tree or List. Must open the form from the tree to select list.	Click the Print link to print or preview.	N/A	Click the policy info tab and enter any modifications.	N/A	N/A	Click the Post Edit link when the modification is complete.	N/A
Endorse Policy	Endorsement	Enter the details in the Description field.	N/A	Enter the endorsement effective date in the Eff. Date field.	N/A	Only policies within the coverage term of the date entered may be selected.	Modification is not recommended. Carriers may not be changed if posted invoices are present.	Click the [Add Application] link only if a new LOB is being added.	N/A	Use the Navigation Tree or List to edit the coverage form. Must open the form from the tree. Click the Underwriting link at the top of the tree. Click the icon to transfer changes to the Change form. Edit if necessary. Do not populate again.	Click the Print link to print or preview.	N/A	N/A	When the endorsement is ready to submit, change the status to Submitted and click the Save Changes link. Completed endorsements may no longer be edited.	N/A	Click the Post Endorsement link upon the receipt of the endorsement from the carrier.	N/A

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Renew Policy	Renewal	Enter the details in the Description field.	N/A	The Eff. Date field uses the current date by default, only modify this date if necessary.	N/A	Select the expiring policy and click the Next link. Select the policies to be included on the renewal policy. Use Search Filters to include Marketing .	Only modify the issuing and billing carrier if changed at renewal, since this will change the policy mode to Re-New-Co . The effective and expiration date are based on the expiring policy that is selected for renewal.	Click the [Add Application] link only if a new LOB is being added.	N/A	Use the Navigation Tree or List. Must open the form from the tree to select list.	Click the Print link to print or preview.	N/A	Click the policy info tab and enter any modifications.	N/A	N/A	N/A	Click the In Force link on navigation toolbar only after all policy changes for the renewal are complete. May not edit without Servicing once the status is no longer Future .
Cancel Policy	Cancellation	Enter the details in the Description field.	Select Flat, Short-Rate or Pro-Rata .	Enter the effective date of the cancellation.	N/A	Use Search Filters if the policy is not displayed.	Modify Coverage Term if incorrect. This term should reflect the inception to the cancellation effective date.	N/A	N/A	Use the Navigation Tree to complete the Lost Policy Release form.	Click the Print link to print or preview.	N/A	N/A	N/A	N/A	Click the Post Cancellation link only after receipt of the cancellation endorsement from the carrier.	N/A
Add Claim	Claim	Enter the details in the Description field.	Select the LOB the claim is for.	Enter the date of loss in the Date of loss field.	N/A	Use Search Filters if the policy not displayed. History policies may be included.	N/A	N/A	N/A	Click the Populate icon and the Navigation Tree to complete the claim form. Do not click the Populate icon again.	Click the Print link to print or preview.	N/A	N/A	N/A	Click the claims tab, Details icon of the claim and enter the claim detail. Click the claim payments tab to enter payments.	The Post link closes the claim and is found on the claims tab. Select this link when tracking the claim is no longer necessary.	N/A
Policy Audit Received	Audit	Enter the details in the Description field.	N/A	Enter the effective date for the audited changes for other than annual audits. If annual audit, enter the effective date of the policy being audited.	N/A	Use Search Filters if the policy is not displayed. History policies may be included.	N/A	N/A	N/A	Use the Navigation Tree or List. Must open the form from the tree to select list. Enter audit details.	Click the Print link to print or preview.	N/A	N/A	N/A	N/A	Click the Post link if no tracking is required. Once the audit settlement is complete, post the audit.	N/A
Certificate of Insurance	Certificate(s) - New	N/A	N/A	N/A	Select Type, Named Insured, Signature and enter a Description .	N/A	Enter data, Save Changes .	Click the [Add New] link and select the form(s) for the certificate.	N/A	The certificate is automatically populated when the form is added (The populate button is gray). Manual entry is required for cancellation info. Selecting Populate is generally not needed on certificates.	Clicking Print allows the batch process for certificate holders to be added to this certificate. If no holders are added, the certificate can be viewed.	Click the certificate holders tab to add holders. The Print icon allows viewing and printing of the individual certificate.	N/A	Change the status only as necessary in the header and click the Save Changes link.	N/A	Click the Post link when the certificate is complete and ready to deliver. After posted, holders may be added but no edits are allowed.	N/A
Auto ID Cards	Verification(s)	N/A	N/A	N/A	N/A	Auto policies display by default. Select the auto policy.	Enter the reference for the Auto ID card as needed and click Save Changes .	N/A	N/A	Edit autos by clicking the Details icon beside the vehicle. To add an auto or fleet card, click the [Add New] link. Use the Remove icon to remove autos not requiring an Auto ID card.	To preview just 1 card, click the Details icon. Click the Issue All link to activate the Print link.	N/A	N/A	Clicking the Active checkbox disables the vehicle from displaying on the default summary view. It does not remove the ability to print ID cards.	N/A	The Issue All link activates the Print link and disallows further editing for the issued cards. An auto may be added manually and edited. The Issue All link is active on the detail view for the auto added.	N/A