Eleviant Non-Payment & Hard Renewal Carrier Instructions

* In Microsoft Word, please utilize the Navigation Pane by clicking “View” on the top toolbar and under the “Show” section, check off “Navigation Pane”
* This will show these instructions organized by their heads per carrier and instruction set

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# Chubb

\*\*All policies on the portal will be Personal Lines

1. Go to the right side under “My alerts”
2. Click “View” next to “Billing alerts”
3. Click “Change” next to “Alerts as of: [date]”
   1. Click “Pick a Date Range” and choose a 7 day date range from the last time you checked the alerts
   2. If alerts are checked daily, click “Pick A Date” and choose today’s date
4. Scroll down to the list of Billing Alerts
5. In the table, under the “Alert Type” column, look for “Final Payment Reminder” (this is the cancel notice)
6. Next to the selected Alert, go to the “Options” drop-down on right side
   1. If you want to check billing details, choose “View Details” – this will open a new tab where you can see the policy number (“Policies included”), Minimum Due, and Payment Due Date

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* 1. If you want the cancel notice, choose “View Billing Document” – this will open a new tab with the pdf cancel notice that includes the Policy Number, Minimum Amount Due, and due date

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1. Back in the Billing Alert table, if you see under “Alert Type” column, “Final Payment Receipt” that means a payment has been received by the insured and the policy reinstated

# Cumberland

\*\* Personal Lines policy numbers begin with CD, HON, HOP, PA, PLP, PLN

## Non-Pays

1. When on main page, go to the left-side navigation column and click “Tools”
2. Under “Tools” choose “Agent’s Inbox” – this will open a new tab
3. Under the “Trans Description” drop-down, choose “Pre Cancel”
4. Set the “Date Produced” to the desired date range since last checked, click “Search”
5. When the list generates, click the envelope icon on the right side of the client’s alert you wish to view – this will open a new tab with the pdf notice where you can see the policy number, due date, and amount due

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## Hard Renewals

1. When on main page, go to the left-side navigation column and click “Tools”
2. Under “Tools” choose “Agent’s Inbox” – this will open a new tab
3. Under the “Trans Description” drop-down, choose “Renewal Business”
4. Set the “Date Produced” to the desired date range since last checked, click “Search”
5. When the list generates, click the envelope icon on the right side of the client’s alert you wish to view – this will open a new tab with the pdf renewal packet where you can see the policy number and renewal effective date

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# FMI

\*\*All policies on the portal will be Personal Lines

1. Click the “Transaction Log” tab
2. Under the “Policy Type” drop-down, choose “41XXXXX Policies” and click “Continue”
3. In the “Dashboard,” click the “Transaction Log” box
4. Click the “Delinquent” box
5. Click on the linked policy number next to clients with a “Description” column that says “Pending Cancellation - Non-Payment of Premium”
6. Click on the “Billing” box
7. On the right side where it says “Status” it should say “Delinquent”
8. To the right of “Status,” click “View Account Billing”
9. Select the “Billing Documents” tab
10. Select the most recent “Cancellation Notice”
    1. Rescind notices also located here
11. This will download the Cancellation Notice pdf which includes the policy number, final due date, and minimum due

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# Nationwide

\*\* Personal Lines policies begin with *numbers* (Commercial Lines begin with letters)

1. Scroll down to “Notification Center”
2. Choose the tab “Billing notices”
3. Under “Agency number,” select “All” (39638, 39848, 49590, 49665, 61885, 66760, 70893)
4. Under “Day range,” select a range (30 recommended)
5. Under “Notification type,” select “Nonpay”
   1. You can also view policies cancelled and reinstated here
6. Click on the name of the insured
   1. This will show you the policy number, minimum due, and payment acceptance date

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1. Click on the linked “Billing account number” – this will open a new tab
2. Scroll down to “Billing Account History” tab and click the most recent “Warning Notice” keeping in mind the “Process Date” column
   1. Please note, if there is more than one policy in pending cancellation for one client, there will be more than one “Warning Notice”
3. This will download the Cancellation Notice pdf which includes the policy number, final due date, and minimum due

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# Philadelphia Contributionship

\*\*All policies on the portal will be Personal Lines

## Non-Pays

1. On the main page in the top right corner, hover over “Agency Reports” drop-down and choose “Agent Transaction Report”
2. Input a date range under “Beginning Transaction Date” and “Ending Transaction Date” based off the last time policies were checked
3. Check off “Cancellation Notice,” then click “Run Report”
4. Click on the linked “PolicyNo”
5. On the left side in the navigation column, click “Policy File”
6. Under Items, click on the most recent “Cancellation Notice” – this will open a new tab with the pdf notice where you can see the policy number, due date, and amount due

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## Hard Renewals

1. On the main page in the top right corner, hover over “Agency Reports” drop-down and choose “Agent Transaction Report”
2. Input a date range under “Beginning Transaction Date” and “Ending Transaction Date” based off the last time policies were checked
3. Check off “Renewal,” then click “Run Report”
4. Click on the linked “PolicyNo”
5. On the left side in the navigation column, click “Policy File”
6. Under Items, click on the most recent “Renewal Package” – this will open a new tab with the pdf renewal where you can see the policy number and renewal effective date

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# Plymouth Rock

\*\*All policies on the portal will be Personal Lines

## Non-Pays

1. Under “Alerts” on the left side choose “Pending Cancellation”
2. The “Action Date” will prefill for the next month (you cannot backdate the “Action Date”)
3. Click on the linked “Policy Number” for the client
4. The box on the right under Recent Activity will show the minimum due and due date
5. In the same box under “Documents,” click “Statutory Notice of Cancellation” – this will open a new window with the pdf of the cancellation notice which includes the policy number, due date (“Effective Date of Cancellation”), and amount due

A close-up of a notice

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## Hard Renewals

1. Under “Alerts” on the left side choose “All Alerts >”
2. Click the green “Document Search” tab on the right
3. Next to “Doc Type,” uncheck “All Document Types” and only check “Renewal Declarations”
4. Make sure “All Profiles,” “All Producers,” “All LOB,” and “All Companies” are selected in the next four fields
5. Change the “Process Date” for the period since Hard Renewals were last checked
6. Click “Apply”
7. Click on the linked “Renewal Declarations” under “Document Type” for the selected client – this will open a new window with a pdf of the renewal declarations page showing the policy number and effective date

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# Progressive

\*\*Personal Lines policies include Auto, Travel Trailer, Boat, Motor Home, Motorcycle (exclude anything Commercial)

## Non-Pays

1. Click the drop-down arrow next to “Manage Policies” at the top navigation bar
2. Click “Policies Need Service”
3. Under “Agency Code(s),” select “All Agency Codes” (05545, 07530, 14387, 22621, 33479, 95502) and click “Submit”
4. Under “Policies Pending Cancellation,” click “View Pending Cancellation”
5. Click the linked “Policy Number” of the client
6. On the left side navigation, click on the policy number that is pending cancel
7. Click the “ID Cards and Documents”
8. Click “Documents”
9. Click the linked most recent “Cancel Notice (PDF)” – this will save the pdf of the cancel notice which shows the policy number, minimum amount due, and due date

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## Hard Renewals

1. Click the drop-down arrow next to “Manage Policies” at the top navigation bar
2. Click “Policy Activity”
3. Go to the box that says “Effective Date on the Policy”
4. Under “Select Report” choose “New Business, Renewals, Quotes”
5. Under “Select Date Range” choose “Last 30 Days”
6. Click “Get Policy Activity”
7. Under the “Transaction” column, look for “Renewal Quote” (these are the Hard Renewals)
   1. You can also type “Renewal Quote” in the search bar under “Filter Results”
8. Effective dates for the renewal policies are listed in the “Effective” column
9. To obtain the declarations page, click the linked “Dec” under “Renewal Quote” in “Transactions” column – this will open a new window with the renewal coverage summary that shows the policy number and effective date

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# Safeco

\*\*All policies on the portal will be Personal Lines

1. On the main page, scroll down to the last box on the left titled “Policy notifications”
2. Click on “Recent Activities”
3. Click the “Billing activities” tab
4. Under the “Transaction” column, in “Filter Transaction,” check off “Pending Nonpay Cancel”
5. Click on the linked number for the client under the “Account/Policy #” column – this will open a new window
6. In the new window, click the “Inquire Billing Information” bubble and press “Go”
7. Under “Current Billing Summary” in the middle of the screen, next to “Current Amount Due,” click the link that says “View”
8. To find the pending cancellation information:
   1. Above “Statement Summary” is a box with the non-payment due date
   2. Under “Statement Summary” is a box with the minimum amount due
   3. Going down further in the table that starts with “Billing Detail” there is a column showing the “Policy Number”

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1. Click the “View Statement” link which is under the red “Help” question mark icon – this will open a new window with the missed “Billing Statement” (this includes the policy number and amount due but *does not* include the non-payment due date)

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*\*\*\*They do not provide the date the non-payment is due on their cancel notices. This information is only found on the first billing screen in a box at the top of the screen.\*\*\**

# Selective

\*\*Personal Lines policy numbers begin with “H”, “F”, or “PCL”

1. On the gray toolbar, hover over “Billing” and select “Billing Portal” – this will open a new window
2. In the “Billing Portal Inquiry System,” select “Cancellation List”
3. Select “Expand All”
4. Non-payment cancellations are listed as “Under Notice” under the “Status” column
   1. You can click the “Status” column once to sort the statuses and “Under Notice” will show first while staying in order by date
5. To view to cancel notice, click the pdf icon under “View Cancel Notice” – this will download the pdf cancel notice in the first window that shows the policy number, amount due, and due date

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# Travelers

\*\*All policies on the portal will be Personal Lines

1. When on the main screen go to the vertical menu on the far right and click “Alerts”
2. Under “Billing Notices,” click “Cancelling Soon”
3. In the “Outstanding Notices of Cancellation” tab, next to “Policies,” click “All” (this will show *all* policies pending cancellation beyond the 10 day timeframe shown under “Cancelling soon”)
4. To get the cancel notice, click on the linked “Policy Number” of the client – this will open a new tab (which can be disregarded) and a new window
5. In the new window, click on the “Account List” tab – the client’s policies will be listed here
6. Next to the policy pending cancellation (it will likely say “*Bill due*”), select “Policy Documents” below
7. Select the most recent linked “Document” titled either “Cancellation Notice” or “Offer to Reinstate” – this will open the pdf in the original window which will show the policy number, minimum due, and due date
   1. Cancellation Notices

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* 1. Offers to Reinstate

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