

Policy List Reports (EB & P&C)

Tuesday, July 9, 2024 4:47 PM

- **EB Version:**
- **Save a default Policy List Report in your My Reports and name it "*EB Post System Update - Policy List Report"**
 - **Update Criteria:**
 - Add 2 fields
 - Policy Last Updated By
 - Date/Time Policy Last Updated
 - Update Profit Center and Client Type
 - Include all active Line Statuses by removing inactive ones before selecting

Criteria

Criteria	Selection
Region	All
Agency	All
Branch	All
Department	All
Profit Center	Selected
Account Lookup Code	All
Client Type	Insured
Policy Type	All
Line Type	All
Line Bill Mode	Both
Policy Effective Date	All
Policy Expiration Date	All
Line Effective Date	All
Line Expiration Date	All
Line Producer	All
Line Commissionable Broker	All
Line Status	Selected
Service Summary Date Entered	All
Service Summary Action	All
Service Summary Stage	All
Service Summary Effective Date	All
Service Summary Stage Changed Da...	All
Service Summary Stage Changed By	All
Service Summary Entered By	All
Account Status	Both
Prospective/Contracted	Both
Account Agency Defined Options	All
Turn Off Policy Download	Both
Record Listing	Each time found
Parameter Page	Include parameter page
Policy Last Updated By	All
Date/Time Policy Last Updated	All
EB Primary Servicer	All

☒ Include selections ☐ Exclude selections

Available

Code	Description
No items found	

Selected

Code	Description	Status
SCN	Acrisure Service Center Transferred (New)	Active
SCR	Acrisure Service Center Transferred (Renewal)	Active
CRW	Cancelled - Rewritten	Active
CNW	Cancelled (New)	Active
CRN	Cancelled (Renewal)	Active
ZER	Created In Error	Active
ZIN	Info Only	Active
NEW	New	Active
BOR	New - BOR	Active
NRN	Non Renewed (New)	Active
NRR	Non Renewed (Renewal)	Active
REN	Renewal	Active
REW	Renewal - Rewrite	Active

- **Update Layout:**
 - Uncheck Print option for the layout with the description of "Policy List Report"
 - Open the other layout to update
 - Delete extra PDF fields
 - Delete SSR fields in Details section
 - Delete Pr/Br Code fields
 - Update policy number to Main policy number
 - Update ICO and PPE to name instead of code
 - Add Issuing Location after PPE
 - Add in Policy level Code & Name for **EB Primary Servicer**
 - Add in Account level Code & Name for **EB Primary Servicer**
 - Match what is shown below in Details section in the second row (after servicing roles)
 - Remove Major sort

Details

Account Looku Account	Policy/Line	Main Policy Number	Line	Line	Line Status	Line	ICO	Premium	Issuing	Code	Name
				Code		Bill	Name	Payable Name	Location		
Code	Name	Profit Center Code	Profit Center Name	Agency Code	Branch Code	Department Name	Date Line Last Updated	Line Last Updated By	Account Status		

- Update Delivery Options
 - Save to Disk
 - Save as Excel
 - Choose main Platform Model folder
 - Name: Policy List Report_Post Platform Model Update_*Project Name and Date*

- **P&C Version:**
- **Create a new report off of the EB policy list report in My Reports and name it "**P&C Post System Update - Policy List Report"**
 - Update Layout:
 - The Policy and Activity level Code/Names will need to be updated to reflect the **P&C Primary Servicer 1**
 - All other criteria can remain as is.

Activity Report

Tuesday, August 20, 2024 1:53 PM

- Save a default Activity Report to your My Reports and name it **"*Post System Update - Activity Report"**

- Update Criteria:

Criteria

Criteria	Selection
Region	All
Agency	All
Branch	All
Department	All
Profit Center	All
Account Type	All
Account Lookup Code	All
Activity Category	All
Activity Code	Selected
Who/Owner	All
Follow up/Start Date	All
Status	All
Date/Time Entered	All
Entered By	All
Association	All
Activity Notes	Include all activity notes
Activity Tasks	Include tasks - full detail
Parameter Page	Include parameter page
Work Group	All

☒ Include selections ☐ Exclude selections

Available

Search where: [] [] [] Find

Code	Description	Status
SAR1	Past Due AR Follow-Up - Item # [XXXX]	Active
SAR2	Apply Credits to Debits Request	Active
SAR3	AR Write Off Request	Active
SAR4	Surety/Bond Past Due AR Follow-Up - Item # [XXXX]	Inactive
SBCD	Broker Commission Payable Disbursement	Active
SCA1	Unknown Payee/Client	Inactive
SCA2	ADVISE: Cash Placed on Account	Active
SCA3	Cash Receipt Exception	Inactive
SCA4	Pull Check Copies from JPMC	Inactive
SCA5	Enter Receipt for Payment	Active

Selected

Code	Description	Status
1DS1	Service Transition to Digital Service	Active

- Update Layout:

- Delete extra PDF fields
- Add department name

Major Sort: ActivityReport.Activity LookupCode

Account Lookup Code Account Name

Details: ActivityReport.SectionFlag=A

Activity	Activity Description	Who/Owner	Follow	Association	Status	Date/Time	Entered By
Department	Name						

- Update Delivery Options

- Save to Disk
- Save as Excel
- Choose main Platform Model folder
- Name: Activity Report_Post Import Platform Model_*Project Name and Date*

EB Book of Business Report

Tuesday, August 20, 2024 1:54 PM

- Save a default Book of Business - Line book Report in your My Reports and name it "EB Book of Business - Line Book"
- Update book criteria

My Reports

• EB Book of Business - ...

Modify Criteria

Layouts

Delivery Options

Account

Activity

Applications

Claim

Client Contracts

General Ledger

Interface

Management

Opportunities

Policy

Transaction

Marketing Preview

Criteria

Criteria

Selection

Region

All

Agency

All

Branch

All

Department

Selected

Profit Center

Selected

Account Lookup Code

All

Client Type

Both

Policy Type

All

Line Type

All

Policy Effective Date

Open days through +0 days

Policy Expiration Date

+0 days through open days

Issuing Company

All

Line Premium Payable Compa...

All

Line Premium Payable Broker

All

Line Producer

All

Line Status

Selected

Account Status

Active

Prospective/Contracted

Both

Account Agency Defined Opti...

All

Policy Premium Billed

All

Policy Premium Annualized

All

Policy Commission Billed

All

Policy Commission Annualized

All

Lines per Policy

All lines

Parameter Page

Include parameter page

Record Listing

Each time found

Include selections

Exclude selections

Available

Code

Description

Status

CAN

Cancelled - General

Inactive

CNW

Cancelled (New)

Active

CPE

Cancellation - Pending

Inactive

CPR

Cancellation - Processed

Inactive

CRN

Cancelled (Renewal)

Active

CRW

Cancelled - Rewritten

Active

HIS

History

Inactive

NRN

Non Renewed (New)

Active

NRR

Non Renewed (Renewal)

Active

PAL

Policy Lapse - Autolapse

Inactive

PIB

Policy Lapse - Lost Business

Inactive

Selected

Code

Description

Status

BOR

New - BOR

Active

NEW

New

Active

REN

Renewal

Active

REW

Renewal - Rewrite

Active

ZIN

Info Only

Active

- Under Layouts - set all to "No" for print except for the Complete Detail layout
- Update Layout:
 - Delete all footer data for PDFs
 - Delete major sort
 - Remove current premium/commission fields from the detail section
 - Remove PrBr Code after Line Status
 - Update ICO and PPE to name instead of code
 - Add in:
 - Main Policy Number (after account name)
 - Issuing Location
 - Policy Premium Annualized
 - Policy Commission Annualized
 - Policy Premium Billed
 - Policy Commission Billed
 - Line Premium Estimated
 - Line Commission Estimated
 - Dept Name
 - Profit Center Code
 - Profit Center Name
 - EB AM servicer role name

Client Code	Client Name	Policy/Line	Effective	Expiration	Status	ICO	PPE	Premium	Commission	Premium	Commission
Details											
Account Lookup C	Account Name	Main	Policy/Line	Line Effective	Line Expiration	Line Sta	ICO Name	Premium Payable	Issuing	Policy	Policy
			Policy Nu						Location	Premium A	Commission
Department	Profit Center	Profit Center	Name							Policy	Policy
Name	Code	Name								Premium Ri	Commission Ri
										Premium Esti	Commission

- Update Delivery Options
 - Save to Disk
 - Save as Excel
 - Choose main KPI folder
 - Name: *Platform database code Book of Business_Date*

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EB Book of Business - Line Book PrBr Detail

Thursday, August 22, 2024 2:49 PM

Create a new report off of the "EB Book of Business - Line Book" and name it "**EB Book of Business - Line Book PrBr Detail**"

Leave Criteria as is

Update Layout:

Add the following Pr/Br fields:

- Producer/Broker
- Receivable/Payable
- Producer/Broker Type
- Producer/Broker Code
- Producer/Broker Name
- Commission Type
- Commission Percent
- Production Credit %
- Screen Order #

Details															
Account Lookup C	Account Name	Main Policy Num	Policy/Line	Line Effective	Line Expiration	Line Status	ICO Name	Premium Pay	Issuing Location	Policy Premium	Policy Commission	Policy Pre	Policy Co	Line Premium Estimate	Line Commission Estimate
Department Name	Profit Center Code	Profit Center Name	Name												
Producer/Broker	Receivable/Payable	Producer/Broker Type	Producer/Broker Code	Producer/Broker Name	Commission Type	Commission Percent	Production Credit %	Screen Order #							

Update Delivery Options so the file saves in the Audit Reports Folder with the name : "*Platform Code* EB Book of Business with PrBr Detail_"

Tuesday, August 20, 2024 1:54 PM

- | Criteria | |
|-------------------------------------|----------------------------------|
| Criteria | Selection |
| Region | All |
| Agency | All |
| Branch | All |
| Department | All |
| Profit Center | Selected |
| Accounting Month | Current Default Month - 1 Months |
| Production Month | All |
| Effective Date | All |
| Transaction Class | Selected |
| Bill Mode | Both |
| Transaction Issuing Company | All |
| Transaction Premium Payable Company | All |
| Transaction Premium Payable Broker | All |
| Type Of Business | All |
| Policy Type | All |
| Line Type | All |
| Transaction Commissionable Broker | All |
| Transaction Producer | All |
| Account Agency Defined Options | All |
| Adjustments | Include Adjustments |
| Financed Transactions | Include Financed Transactions |
| Installments | Include Installments |
| Parameter Page | Include parameter page |

☒ Include selections
 ☐ Exclude selections

Available

Code	Description
< NO VALUE >	
ACT	Accounting
AGR	Agriculture
BEN	Benefits
BND	Bonds
COM	Commercial
CPG	Construction
EBR	Equine - Brokered
EEA	PL Employee Account
ENB	Equine - Non-Brokered
FDD	Food Delivery

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▲

Selected

Code	Description
XSC	Acrisure Service Center (HO Use Only)

- [illegible]

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P&C Book of Business - Line Book PrBr Detail

Thursday, August 22, 2024 2:49 PM

Create a new report off of the "EB Book of Business - Line Book PrBr Detail" and name it "**P&C Book of Business - Line Book PrBr Detail**"

Update Criteria:

Department

- Include everything except for Accounting and Benefits

Policy Expiration Date - Relative Date Range

- +1 days through open days

Criteria	
Criteria	Selection
Region	All
Agency	All
Branch	All
Department	Selected
Profit Center	Selected
Account Lookup Code	All
Client Type	Both
Policy Type	All
Line Type	All
Policy Effective Date	Open days through +0 days
Policy Expiration Date	+1 days through open days
Issuing Company	All
Line Premium Payable Compa...	All
Line Premium Payable Broker	All
Line Producer	All
Line Status	Selected
Account Status	Active
Prospective/Contracted	Both
Account Agency Defined Opti...	All
Policy Premium Billed	All
Policy Premium Annualized	All
Policy Commission Billed	All
Policy Commission Annualized	All
Lines per Policy	All lines
Parameter Page	Include parameter page
Record Listing	Each time found

☒ Include selections ☐ Exclude selections

Available

Code	Description
ACT	Accounting
BEL	Benefits - Large (Eligible Lives of 100+)
BEM	Benefits - Middle (Eligible Lives 20-99)
BES	Benefits - Small (Eligible Lives 2-19)

Selected

Code	Description
ARR	Risk Resources
BND	Bonds
CLL	Commercial - Large (10K+ Revenue)
CLM	Commercial - Middle (2.5k-10K Revenue)
CLS	Commercial - Small (<2.5k Revenue)
ILF	Individual Life & Health
OTH	Non-Insurance Products
PEL	Personal Lines - Large (1K+ Revenue)
PEM	Personal Lines - Middle (250-1K Revenue)
PES	Personal Lines - Small (<250 Revenue)
TPA	TPA

Update Layout:

- Update servicing role name to P&C Primary Servicer

Update Delivery Options so the file saves in the Audit Reports Folder with the name : "*Platform Code* P&C Book of Business with PrBr Detail_"