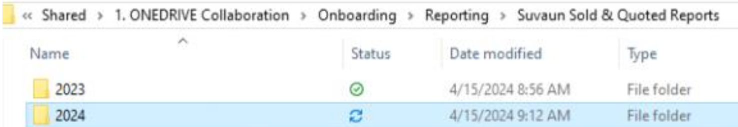
Suvaun Panel Carrier Report

Sunday, September 24, 2023 1:54 PM

1. **Combine both Suvaun reports (Quoted & Sold) into one workbook and rename the tabs as shown below**

   Suvaun Quoted Data | Suvaun Sold Data

2. **Save the new combined file in the applicable year's folder in the file path below with the name "Suvaun Quoted & Sold Report_*date*"**



3. **Update Data & Add Pivots**

Once in the file, first search for all test & sample clients on both main reports and delete them

On each tab > Filter the Effective Date column for the current year's data and highlight all the dates in that column

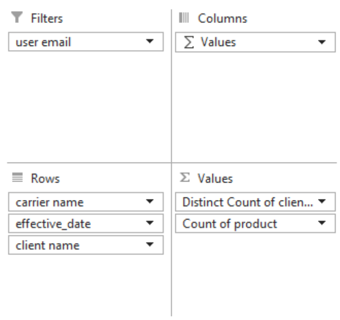
Clear all filters and then filter for "No Fill" items in Effective Date column and delete all rows

Clear all filters

Filter the Carrier Name column to include everything except the panel carriers (Guardian, Humana, UNUM) and delete all rows to leave only Panel Carrier data
*Do no include Equitable for any effective dates 5/1/25 or beyond

Clear all filters

Add Pivot tab from the Quoted Data tab ensuring to check the box for "Add this data to the data model" and name it "Panel Carrier Quoted Pivot".



Add the Pivot Fields below (screenshot to the right)
User Email>Filters
Carrier Name>Rows
Effective Date>Rows
Client Name>Rows
Client Name>Values (Distinct Count)
Product>Values (Count of)

Collapse all 4 panel carriers so only the totals show and then highlight the Carrier Names so they stand out when scrolling through when expanded

Repeat the blue steps above to add a pivot tab this time from the Sold Data tab and naming it "Panel Carrier Sold Pivot"

Change names of Labels and add header at the top to match screenshots below

Panel Carrier Quoted Pivot

user email	All	
Row Labels	**Number of Groups Quoted**	**Lines Quoted**
Equitable	**97**	**275**
Guardian	**114**	**318**
Humana	**109**	**293**
Unum	**96**	**274**
Grand Total	**124**	**1160**

Panel Carrier Sold Pivot		
user email	All	
Row Labels	Number of Groups Sold	Lines sold
⊞Equitable	2	6
⊞Guardian	11	26
⊞Humana	10	24
Grand Total	23	56

Change the color of the pivot tabs at the bottom so they stand out

4. **Send the file to Brian, Mike, Bethany, Ashley/Katie, & Christa**

Termed Producer Process/ADS AP Producer Report

Wednesday, March 13, 2024 10:30 AM

This report is scheduled to be emailed to Ashley and Katie on the 25th of the month and is used to be sent to HR to check for any termed producers. The report is configured to only pull employee files with a department of "ADS EB Producer".

Once received:

- Save the report in the "AP Producer List Reports_Originals Sent to HR" folder located here with "(Original)" at the end of the name

  Onboarding > Systems Implementation > Termed Producers > AP Producer List Reports_Originals Sent to HR

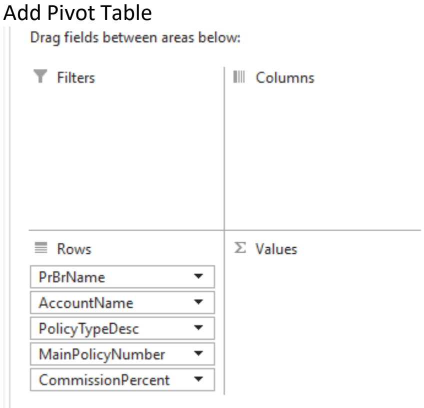
- Open the file and make the following adjustments:
  - Wrap text on entire sheet for easier viewing, if necessary
  - Add Filters
  - Count how many Producers are showing and compare to the number showing in the Added Producer Report saved in the Termed Producers folder (Also linked on the Added Producer List page)
  - You can now close out of the report

- Save a copy of the original report in the "AP Producer List Reports_Final Copies Received from HR" folder with "Comparison" at the end of the name

  Onboarding > Systems Implementation > Termed Producers > AP Producer List Reports_Final Copies Received from HR

- Pull List of current active producers from the Active Worker List to compare to the active 1DS EB Producer list: Active Worker List
  - Export the full list (using the "Data with current Layout option) of employees from the Platform Communications Employee List
  - Once the export downloads > open the spreadsheet and move a copy of the exported data onto the comparison spreadsheet
  - Re-label tab as "Active Worker List"
  - On the ADS AP Producer List > Use the match function to match lookup codes to the Active Worker List and highlight matches in a fill color
  - Once the match on the ADS AP Producer List is complete, add in a new column in column "C" after account name
    - Rename the Column "Active Employees"
    - Filter to all lookup codes that have the selected fill color > Fill in Yes in the Active Employees column
    - Filter the lookup codes to any no fill cells > Fill in No in the Active Employees column

- If there are any producers showing as no in the added "Active Employees" column:
  - Run a BOB w/ PrBr to identify which policies they are listed on. Save that report in the folder named : "Epic Book of Business for Termed Producers" located in the Termed Producers folder
  - First check the main report to see if the termed producer(s) is listed on any active policies. If they are, continue to the first sub-bullet below, if not, skip to the next main o bullet.
    - Add Pivot Table

      - Change Design Layout: Design > Report Layout > Show in Tabular Form
      - Remove Subtotals and Grand Totals
      - Filter PrBr Name Column to only show termed producers
    - In Epic, remove the termed producer from any active policies they are on just leaving the 1DS House entry
    - Run a Production Report going a year back and save in the folder named "Production Reports for Producer Commission Calc" located in the Termed Producers folder
      - Add Pivot Table
        - AccountName - Filter
        - PolicyNumber - Rows
        - AccountingMonth - Rows

- Description - Rows
- AgencyCommissionAmount - Values (Sum)

□ Make copies of the pivot table for each of the accounts you will need to calculate and then filter each

□ Manually figure up the commission received over the past 3 payments ensuring you verify the policy number is one the producer is on and looking at the accounting months. Enter that figure at the bottom

AccountName	Mello Marketing, LLC
Row Labels	**Sum of AgencyCommissionAmount**
79714	**2258.72**
202402	**766.93**
AAS - DB 02/24 $766.93 02/29/24	766.93
202401	**1152.01**
AAS - DB 01/24 $508.05 01/31/24	508.05
AAS - DB 11/23 $643.96 01/11/24	643.96
202312	**339.78**
AAS - DB 11/23 $339.78 12/27/23	339.78
Grand Total	**2258.72**
Commission Received over past 3 payments	**1918.94**

□ These figures will be added to Column H of the "ADS Full List of Termed Producers" report in the next step

- Add termed producer(s) to the "ADS Full List of Termed Producers" file saved in the Termed Producers folder
- Inactivate the producer's Epic employee file and add comment stating they are no longer employed
- Attach any backup emails/reports stating they were termed
- Remove the producer from the "Added Producer List" report linked on the Added Producer List page

Carrier MoM Commission Report

Friday, July 12, 2024 10:24 AM

- Run updated Carrier MoM Commission Variance Report *Update the Accounting Month criteria to include the month that just closed

- Save the report in the Production Reports Folder in OneDrive
- Onboarding > Reporting > Carrier MoM Commission Variance Report > Production Reports

- Create a copy of the prior month's Carrier MoM Commission Variance Report for the new month
- Review the new production report to delete any data coded to 1DS that is not EB
  - Filter Dept code or name column to anything that is not benefits
  - Remove from the report and clear filter

- Add a copy of the new production report's Complete Detail tab into the Carrier MoM Commission Variance Report and add the date to the tab title.
  - On the YTD tab, add in a column before the Monthly Average for the new month's production data
  - Update the Pivot Table's data source (under pivot table analyze) to pull in the data from the new production tab
  - Update the formula for the monthly average to include all columns and copy down to all rows
  - Update header on new month's column and review to carve out potential issues
  - Delete the tab from the prior month's production
  - Confirm that monthly production total matches the total commission reported by Acccounting

Cost Basis Report Procedure

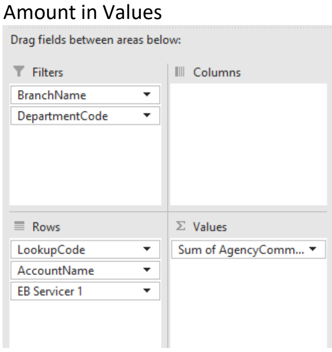
Wednesday, January 31, 2024 3:54 PM

The Cost Basis Report is located here:

OneDrive - acrisurellc.com > Shared > 1. ONEDRIVE Collaboration > Onboarding > Reporting > Cost Basis Report

1. Create a new tab for the month you're reporting with the following columns (updating the month name).

A	B	C	D	E
Production Report Data				
Lookup Code	**Group Name**	**Account Manager**	**Commission $**	**Copy of Current Group List**

2. Using the Production Report received from Accounting located in that month's KPI folder:
    - Add a new Pivot Table on the Production Report and name it "Cost Basis Production"
    - Add Branch, Department Code & Line Status Code in Filters / Add LookupCode, AccountName & EB Servicer 1 in Rows / Add Agency Commission Amount in Values
    - 

    - Update filters:
        - ADS Branch
        - EB Departments (if needed)
        - Exclude ZIN status
    - Click Design and change Report Layout to "Show in Tabular Form"
    - In the top left corner > Under Subtotals click "Do Not Show Subtotals"
    - Change the format of the Commission Column to Currency
    - Copy the data from the Cost Basis Production tab and paste as Values in the new month's tab of the 2024 Cost Basis Report - be sure that you have captured the full list before pasting.
    - Once Pasted, review the list and combine any rows that are for the same account - may still list old AM on some transactions and need to combine total and update row to reflect the new AM.

3. Go to the main reporting tab and copy the current full list of Lookup Codes in Column B and paste into Column E on the new month's tab

4. Highlight the duplicates of columns A & E and fill with a color

5. Filter Column A by color with the No Fill items

6. Once filtered, copy the data for Lookup Code, Group Name, & Account Manager and paste as Values at the bottom of the main group list on the 1st tab (2025 Cost Basis Report)

7. Unhide all month columns > Now highlight the bottom row from the previous list and use Format Painter to format the added rows. Re-hide the future month's columns.

8. Now copy the formulas down for Columns T-W for newly added lines

9. Alphabetize the Group List in Column C

10. Update the AM column as needed as groups are reassigned to other AMs.
    - Run a **Client list** report (including EB Servicer 1).
    - Filter Type of Business for anything other than Employee Benefits & delete
    - Clear filters

- Check for missing EB Servicer 1 and fill in if account is active.
- Delete any inactive accounts with blank EB Servicer 1 fields.
- Use XLOOKUP to fill in AM on Cost Basis main tab for (include both active and inactive accounts). Copy/Paste over XLOOKUP results in column D with AM names as Values.

11. Return to the new reporting month's production tab and clear filter in column A.

12. Back on the main tab, copy the formula text over from the prior month on the first row and update the table being used to the new month's production tab. **Then add the Absolute reference by adding $ before the column and rows listed in the new table array. (Ex. For the new table_array shown below you would make it "March!$A$3:$D$848")**

```
=IFERROR(VLOOKUP($B4,March!$A$3:$D$848,4,0),0)
VLOOKUP(lookup_value, table_array, col_index_num, [range_lookup])
```

13. Copy the formula down to all cells

14. Review the Growth Data column to confirm that all groups are falling within one of the conditional formatting ranges

15. Mark inactive groups in column W.
    - Use Client List to find inactive accounts and match that list to the list on the main account tab formatting with red font (add the inactive list to new helper tab to do this).
    - Then filter for only the red font and enter "Yes" in column W for any new inactive accounts
    - Clear the filter and then delete the helper inactive client tab

Send a copy of the report to Erik, Mike & Brian using the email template saved in the Cost Basis Folder (may add TL's in the future)

2023 Q4 AM/CSR Contest Reporting

Thursday, September 21, 2023 10:37 AM

Q4 Contest Tracking - ...

<u>AMs</u>

Customer Engagement Category:

- *Send an email leveraging newly created renewal email templates to 100% of assigned customers with a renewal date during the contest period. The email must leverage template content from various renewal stages: actual renewal, 45 day follow up, etc.*
- This will be based off emails that are sent/received in contest period and apply to renewal dates within the contest period
- **Self-Reporting**
    - Jason created a weekly tracker for this category which will be distributed each AM for tracking purposes

Digital Engagement Category:

- **Ease** - *Customer not utilizing Ease today for enrollment agrees to utilize Ease and captures enrollment in Ease*
    - Report out of Ease cannot be utilized because groups are already entered in Ease but not currently using it
    - **Self-Reporting**
        - Report sent to AM's for tracking emails will include a tab for Ease
        - Update report for groups that start utilizing Ease for enrollment and include: Group name/renewal open and close dates for enrollment/renewal date
        - This may require some spot checking in Ease
- **Suvaun** - *Newly quoted ancillary line of coverage(s) and plan enhancements in Suvaun*
    - **Utilize monthly report from Suvaun** (Suvaun AAS Quoting Report_10.5.23 attachment)
        - Review effective dates for contest period
        - Quoting in Suvaun as of 7/31/23 – older data may need to be pulled/confirmed

Customer Solutions:

- *Adding new LOC to a monoline group during the contest period –*
    - **Run Policy ADC Report weekly and cross reference to Monoline Report / add in tab summarizing new points for each AM**
        - Utilize policy ADC report for New Line of Coverage policy ADC:
            - Run updated Policy ADC Report in Epic
            - Filter report to show effective dates within the contest period
            - Filter Policy Agency Defined Code column to only show New Line of Coverage ADC to cross reference on monoline report
            - Compare to previous week's report to grey out lines already accounted for
            - Compare to monoline report run on 10/1 > highlight monoline report to mark groups with new LOC added and add notes
                - We may need to use updated monoline reports going forward – we can reassess on 11/1 when the next report is generated
            - Highlight Lines added to monoline groups on Policy ADC Report

- *Adding new LOC or Plan enhancement to existing customer during the contest period*
    - **Run Policy ADC Report weekly / add in tab summarizing new points for each AM**
        - Utilize policy ADC report for New Line of Coverage/Plan Design Change ADCs:
            - Filter report to show effective dates within the contest period
            - Filter Policy Agency Defined Code column to only show New Line of Coverage ADC and Plan Design Change ADC
            - Compare to previous week's report to grey out lines already accounted for
        - **New LOC added to a monoline group will also count toward points in this category**

Any points for Makayla's groups will go to the person handling the group – refer to who it was entered by

<u>CSRs</u>

AAS Total New LOC:

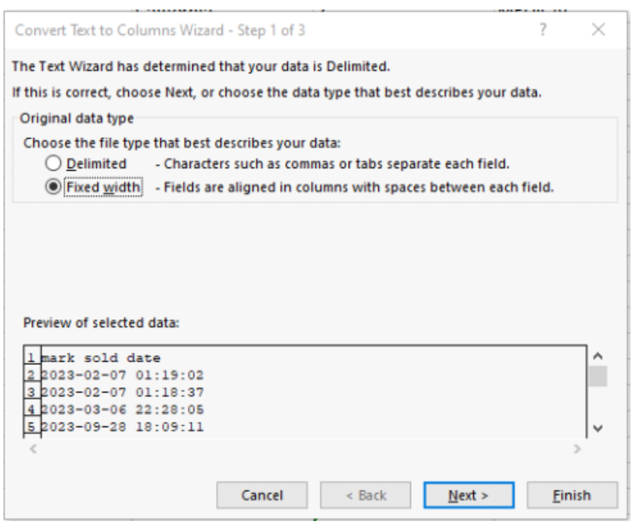
- Update with total based on new LOC added in each reporting period
- Weekly total will be included in the Summary

Suvaun Sold Report (% of Groups Sold)

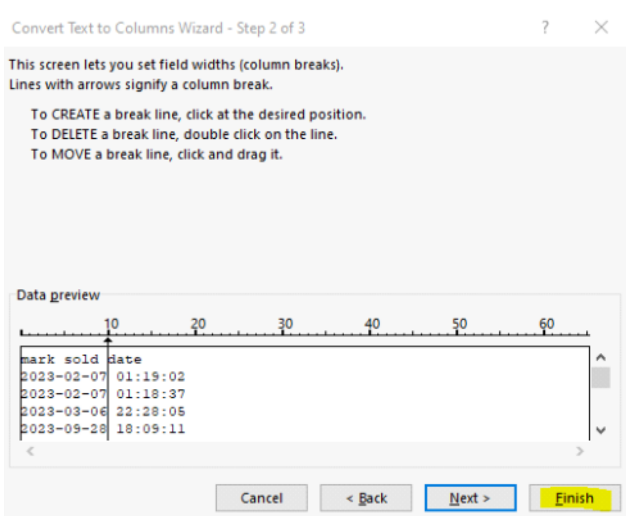
Monday, November 27, 2023 10:03 AM

Use these instructions to determine the percentage of groups sold in Suvaun in relation to the total number of active groups in Epic.
*Met with Mike on 11/22 to see if we could calculate this % for Erik - not yet included in KPIs but may be added

- **Compare total number of groups on Suvuan sold report for rolling 12 prior months to the total group count in Epic on the curr ent KPI Report**
- **Open the most recent Suvaun Sold Report (received from Shawn or Jai)**
  - Remove any test accounts from the report
  - Need to update "Mark Sold" column on report to break out the time from the date (column L)
    - Highlight Column > Click into Data Tab > Text to Columns
      - Convert Text to Columns Wizard window will open



      - Select Fixed Width > Click Next
      - Line should be added in between date and time > Click Finish



      - A second column will be inserted for the time and the date will now be on its own

- **Make a copy of the data table to remove any data from the report that is not in the rolling previous 12 months**
  - Right click on Table Sheet > Click Move or Copy
  - Check off box to create a copy and Click OK
  - Rename your new Sheet "Rolling 12 Months"
  - Add filters to columns

- Use the Mark Sold column (dates) to filter and remove and data that is not in the previous rolling 12 months
  - Example: If using the 11/1/2023 Suvuan Sold Report, we would only want to include November 2022 - October 2023. Filter to all other months and delete to remove
  - Clear filter to show data
- Once data is removed and rolling 12 months remain - insert table Pivot to get total number of groups
- **Divide by total group count in Epic on KPI report to see % of groups sold in Suvaun in last year**

(WIP) Accessing the DQD Report

Thursday, October 19, 2023 8:15 AM

DQD Instructions

DQD (Data Quality Dashboard)

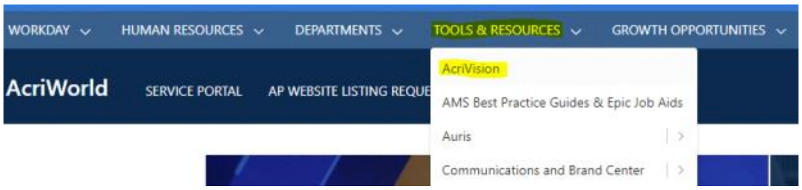
To access the DQD:

1. In your web browser, navigate to the **AcriWorld** home page

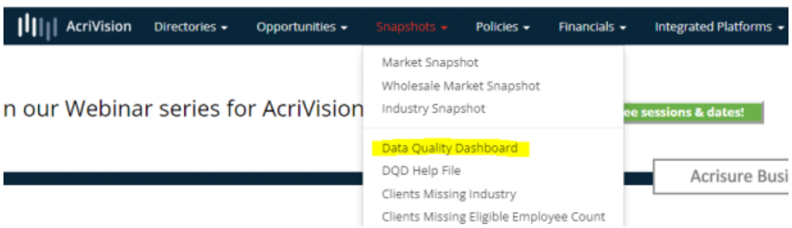
   https://acrisure.sharepoint.com/sites/AcriWorld

   AcriWorld

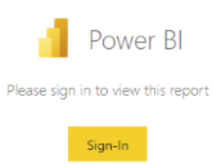
2. Next navigate to AcriVision by clicking on **Tools & Resources** and click on **AcriVision**



3. From the AcriVision home page, click on **Snapshots** and then **Data Quality Dashboard**



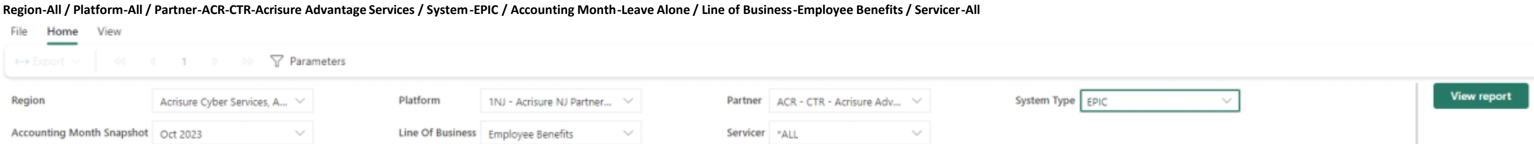
4. On the Power BI screen, click **Sign-In**



*If nothing pulls up, toggle to another AcriVision screen and then try to go to the Data Quality Dashboard again.

5. Update the report parameters as shown below and hit **View Report**

Region-All / Platform-All / Partner-ACR-CTR-Acrisure Advantage Services / System-EPIC / Accounting Month-Leave Alone / Line of Business-Employee Benefits / Servicer-All



6.

Total Source - Epic Data pull for ADP

Tuesday, January 28, 2025 8:36 AM

EMPLOYEE BENEFITS VERSION

- **Use these instructions when a refreshed EB data file from Epic is needed for ADP Total Source**

- Generate updated policy list report - "Policy List Report - Total Source ADP Data Pull"
- Pull updated Client list report including the account address
  - Confirm the report includes Address 1, Address 2, City, State and Zip code

- Open the policy list report
  - Add in 5 columns after FEIN in column D to add in address fields
  - Add in headers

C	D	E	F	G	H	I
AccountName	FEIN	Address1	Address2	City	StateCode	ZipCode

  - The report need to be narrowed down to Medical lines only. Delete rows for any line types other than Medical by filtering in column W (line type description)
  - Remove duplicates from the policy list report based on Lookup Code and line type description fields only
- Open the Client List
  - Add in address fields using Xlookup to pull them from the client list into the policy list report (using lookup code)
  - Zip code column will need to be fixed for extended zip codes
    - Filter down to long zip codes and update formatting to custom for zip code+4

- Add in column to identify lookup codes that were already sent to ADP
- Complete match to prior month's report to identify groups already sent before sending to Mike

<u>EB Platform Model Report Criteria</u>

***Need to add XSC profit center criteria for Platform databases**

Criteria

Criteria	Selection
Region	All
Agency	All
Branch	All
Department	Selected
Profit Center	Selected
Account Lookup Code	All
Client Type	Insured
Policy Type	All
Line Type	All
Line Bill Mode	Both
Policy Effective Date	Open days through +0 days
Policy Expiration Date	+0 days through open days
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 Date	All
Service Summary Stage Changed By	All
Service Summary Entered By	All
Account Status	Active
Prospective/Contracted	Contracted

Include selections Exclude selections

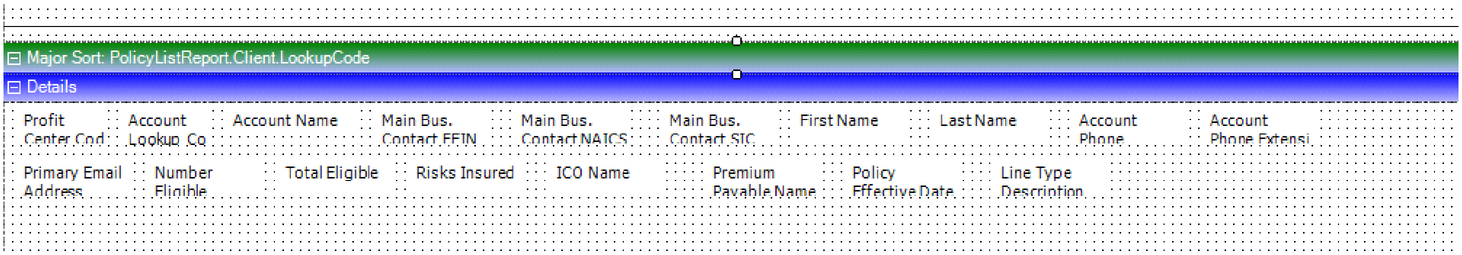
Available

Code	Description
ACT	Accounting
AGR	COM - Agriculture
BEN	Employee Benefits
BND	Bonds
CHS	Compliance & HR Services
COM	COM - General
CPG	COM - Construction
EBR	Equine - Brokered
EEA	PL Employee Account

Selected

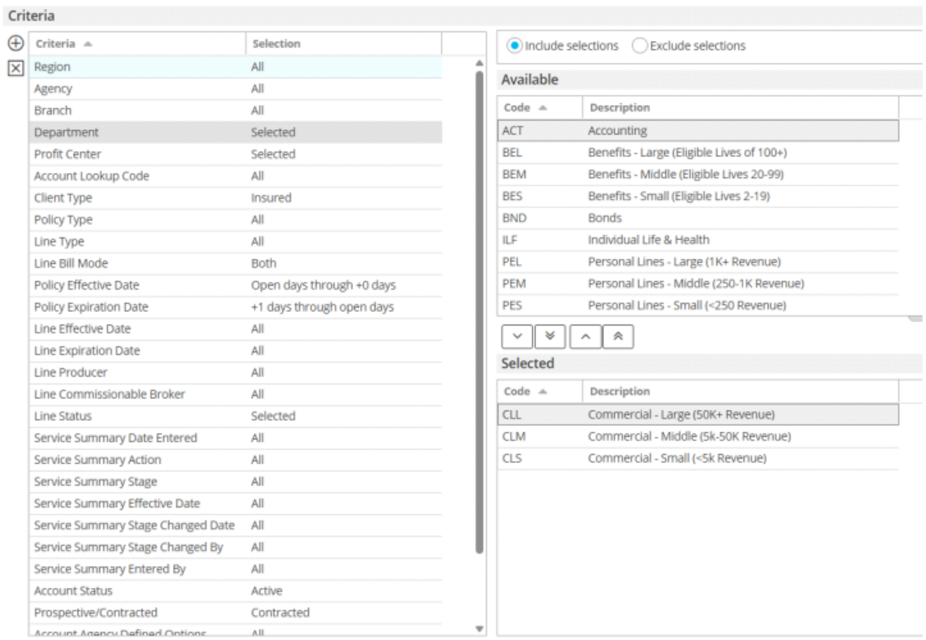
Code	Description
XSC	Acrisure Service Center (HO Use Only)

<u>EB Platform Model Report Layout</u>



CL Platform Model Report Criteria

***Need to add XSC profit center criteria for Platform databases**



CL Platform Model Report Layout

(removed EB specific fields for Number Eligible, Total Eligible and Risks Insured)