

Description:

This board captures the high-level status of each project (block transfer).

Design Notes:

Cell/Column Type	Notes
Automations	<ul style="list-style-type: none">Whenever a new project is added to the board a new project plan board is created for that project.Whenever a new project is added to the board it is also added to the AAS Onboarding Volume board.Whenever a new project is added to the board a notification is sent to Heidi Sanoussi & Ella Elyasaf (this notifies them to link the new project to their boards)
Columns w/ Changeable Cells	<ul style="list-style-type: none">ProjectOB Coordinator
Columns w/ Connector Cells	<ul style="list-style-type: none">Project Plan Board Connection - You can connect multiple project/block transfer boardsAAS Onboarding Volume Board Connection
Mirrored Cells	<ul style="list-style-type: none">From Project Plan Board<ul style="list-style-type: none">TimelineOverall ProgressStatus CellsFrom Onboarding Volume Board<ul style="list-style-type: none">Overall Project StatusAP LocationAP CodePlatform
Status Columns	<ul style="list-style-type: none">Mark the status of various milestonesMilestones Marked<ul style="list-style-type: none">KickoffInformation GatheringData AnalysisEPIC BuildBOR ChangesEase/Suvaun BuildWelcome Packages SentQuality ReviewOverall Project Status<ul style="list-style-type: none">Not StartedIn ProgressOn HoldComplete
Text Column	<ul style="list-style-type: none">Project

Board Permissions

People	Permission Level
Taylor Montgomery Mike Feldman Ashley Hirschman Jordyn Merchant Katie Jones Beck Morrell Noelle Cardiel Casey Wakeford Theo Chillis Charity Schweiger	<ul style="list-style-type: none">View everything on the boardEdit everything on the board
Everyone else w/ board access	<ul style="list-style-type: none">Read Only

Page Last Updated/Reviewed: 01/14/2025

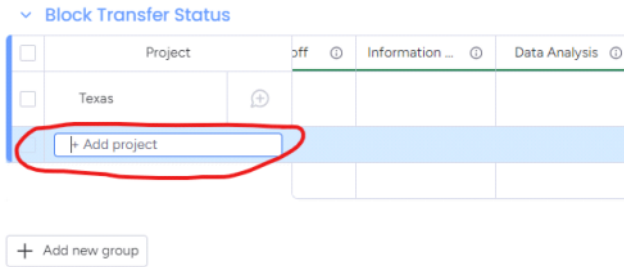
Board Terminology:

Term	Description
Connector Cell	Cell that is used to connect two boards together and allows you to have mirror cells between the two boards.
Date Column	Column that is formatted for date
End Date	This is the same as Transfer Effective Date.
Formula Column	Column that contains a formula
Hidden Columns	These columns are hidden from view and are purely used in the calculation of % progress.
Mirrored Cell	A cell that is tied to a cell on another board and displays same information from the cell on the other board.
OB Coordinator	The person assigned to lead the onboarding project.
Project	This is the same as Block Transfer
Road Block	Major issue that prevents the project from moving forward <i>Includes things like:</i> <ul style="list-style-type: none">AP asks to postpone block transfer for an extended periodblock transfer is cancelled <i>Excludes things like:</i> <ul style="list-style-type: none">EPIC/Ease/Suvaun build taking longer than expectedData from carrier not complete
Start Date	Date project begins. Usually corresponds with the date the kickoff meeting is held.
Status Column	Column that displays status of project/milestone using colors. Color Coding: <ul style="list-style-type: none">CompleteIn ProgressRoad BlockNot Started
Text Column	Column formatted for text

AUDITING IN PROGRESS - 01/14/2025 CW

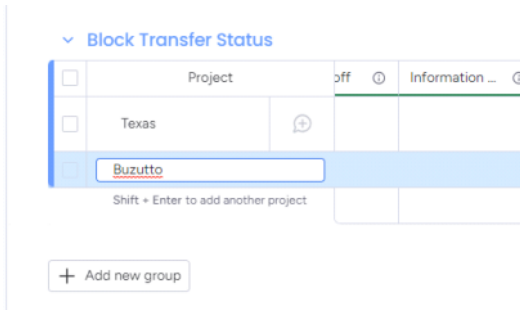
1. Navigate to the **Digital Service Center Onboarding** folder. You should see the **AP Onboarding Overview** board within the listed boards.

On the **AP Onboarding Overview** board, select '+Add project' at the bottom left of the table, as shown below:



2. Type in name of the block transfer project
 - o **Example:** Buzutto

Note: The block transfer will be titled by AP Name OR the Platform Name. Adjust name as needed.

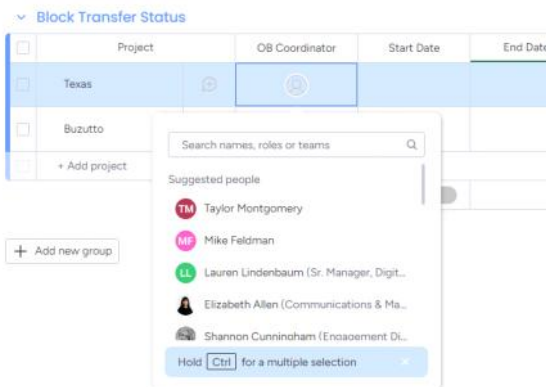


3. Hit enter

A new project board under the **Digital Service Center Onboarding** folder will have now been created for the block transfer project, and the project should be automatically added to the **AAS Onboarding Volume** board by completing the previous steps. The next step is to fill in a few cells within the table, which will carry over to the newly created project board.

4. In the OB Coordinator column, click the person icon and select yourself as the assigned project manager, or on behalf of someone else.

Note: There will be some suggested people listed, but if you don't see the person you are looking for, you can search for them by typing their name in the search box at the top.



- ★ **Note:** Going forward, you won't need to touch the AP Onboarding Overview board for your project. The Timeline and Project Status will automatically update to match what is entered on the direct project board/plan.

[Click to go to Next Steps: AP Onboarding Plan Board Setup](#)

Description:

This board outlines the detailed project plan for a particular block transfer.

Design Notes:

Cell Type	Notes
Status Columns (Item Level)	<ul style="list-style-type: none">Mark the status of various milestonesMilestones Marked<ul style="list-style-type: none">KickoffInformation GatheringData AnalysisEPIC BuildBOR ChangesEase/Suvaun BuildWelcome Packages SentQuality ReviewColor Coding<ul style="list-style-type: none">CompleteIn ProgressRoad BlockNot Started
Mirrored Cells	<ul style="list-style-type: none">OB Coordinator (Item Level)Start Date (Item Level)Subitem Duration (Item Level)<ul style="list-style-type: none">This column sums up all the durations values from the subitems.Used only for properly calculating overall project progress.Subitems Weighted Progress Formula (Item Level)<ul style="list-style-type: none">This column sums up the weighted progress value from the subitems.Used only for properly calculating overall project progress.
Changeable Cells	<ul style="list-style-type: none">End Date (Item Level)Timeline (Subitem Level)Progress (Subitem Level)All Status Columns (Item Level)Duration (Subitem Level)
Connector Cells	<ul style="list-style-type: none">Overview Board Connector (Item Level & Subitem Level)You can connect multiple project/block transfer boards
Formula Cells	<ul style="list-style-type: none">Duration (Item Level)<ul style="list-style-type: none">SUM(days([End Date],[Start Date]),1)Progress (Item Level)<ul style="list-style-type: none">Multiply(ROUND(DIVIDE([Subitems Formula],Minus([Subitems Duration],71)),2),100)Weighted Progress Formula (Subitem Level)<ul style="list-style-type: none">multiply([Duration],[Progress])
Hidden Columns	<ul style="list-style-type: none">Subitems Duration (Item Level)Subitems Weighted Progress Formula (Item Level)Overview Board Connector (Item Level & Subitem Level)Weighted Progress Formula (Subitem Level)

Page Last Updated/Reviewed: 01/14/2025

Board Terminology:

Term	Description
Project	This is the same as Block Transfer
OB Coordinator	The person assigned to lead the onboarding project.
Start Date	Date project begins. Usually corresponds with the date the kickoff meeting is held.
End Date	This is the same as Transfer Effective Date.
Mirrored Cell	A cell that is tied to a cell on another board and displays same information from the cell on the other board.
Road Block	<p>Major issue that prevents the project from moving forward</p> <p><i>Includes things like:</i></p> <ul style="list-style-type: none">AP asks to postpone block transfer for an extended periodblock transfer is cancelled <p><i>Excludes things like:</i></p> <ul style="list-style-type: none">EPIC/Ease/Suvaun build taking longer than expectedData from carrier not complete
Connector Cell	Cell that is used to connect two boards together and allows you to have mirror cells between the two boards.
Hidden Columns	These columns are hidden from view and are purely used in the calculation of % progress.
Text Cell	Cell formatted for text
Date Cell	Cell that is formatted for date
Formula Cell	Cell that contains a formula
Item Level	Top line of the project plan that displays data for overall project status. Subitems roll up under this level.
Subitem Level	Tasks/subitems that roll up under the item level.

Board Permissions

People	Permission Level
Taylor Montgomery Mike Feldman Angie Garcia Ashley Hirschman Jordyn Merchant Katie Jones	<ul style="list-style-type: none">View Everything on the boardEdit everything on the board
Everyone else w/ board access	<ul style="list-style-type: none">Read Only

Click to go to Acrisure Digital
Transformation Monday.com Workspace

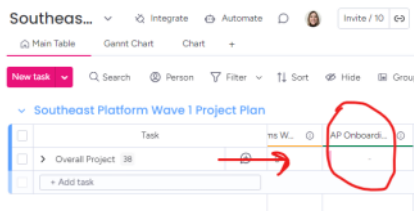


Do not proceed unless you have completed [Adding the Project to the AP Onboarding Overview Board](#).

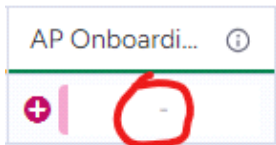
1. Go to the project plan board that was automatically created for the block transfer you are working on

Note: It should now be listed under the **Digital Service Center Onboarding** folder

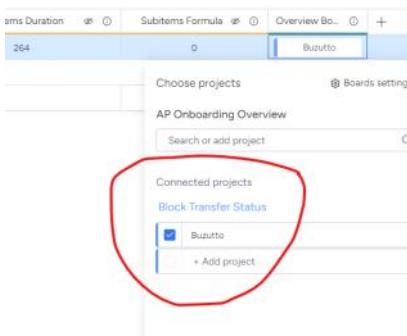
2. Scroll to the far right until you find the **AP Onboarding Overview** column



3. Click the - icon

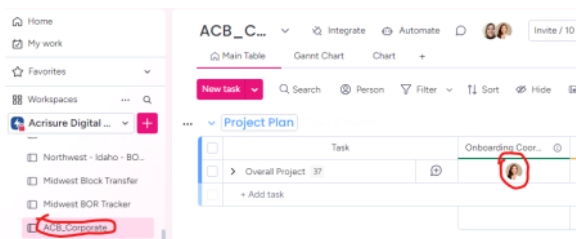


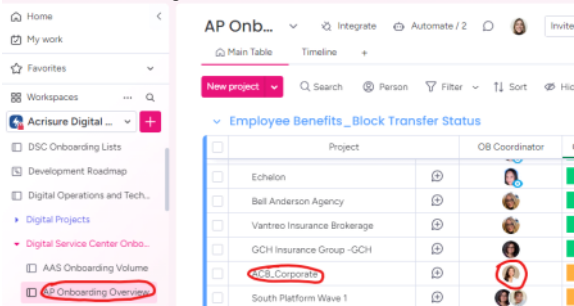
4. Check the box that corresponds with the block transfer you are working on under the Block Transfer Status heading



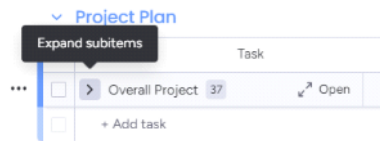
The **Onboarding Coordinator** column should now match the corresponding columns on the **AP Onboarding Overview** board

Example:





5. On the project board, click the > button next to Overall Project to display the subitems



6. Find the 1st subitem and go to the timeline column

Task	Onboarding Coord...	Start Date	End Date	Duration	Progress
Overall Project 37	TM	Jun 1, 2023	Aug 21, 2023	82	0%
Subitem	Task	Assigned to	Timeline	Duration	
1.1	Partner Kickoff Meeting	AAS-OB	Jun 1	1	

7. Click the timeline icon and choose the date of the first subitem

Task	Onboarding Coord...	Start Date	End Date	Duration	Progress	Kickoff
Overall Project 37	TM	Jun 1, 2023	Aug 21, 2023	82	0%	Not Started
Subitem	Task	Assigned to	Timeline	Duration	Progress	Dep
1.1	Partner Kickoff Meeting	AAS-OB	Jun 1	1	0%	
1.1.1	Inform AA AM Team Management of Project Kickoff	AAS-OB	Jun 1	1	0%	1.1
1.2	Account Management System (ex. EPIC, BKB)	AP	Jun 1	1	0%	1.1
1.3	Benefits Administration System (ex. Easie, Navigator)	AP	Jun 1	1	0%	1.1
1.4	Subitem utilization (Y/N)					
1.5	Number of Groups in Block Transfer Request					
1.6	Compliance/Notifications - How are notifications (Stat					
1.7	QA Assignments - Are any of the transferred groups as					
1.8	Request Block Transfer Data Template - AP to provide					
1.9	Pre-ER Communication: Email to AP, Benefits Overview					
2.1	Review Groups for Block Transfer - ensure all required					
2.2	90 Day Renewal Window - identify groups within the 9					
2.3	Identify carriers that require manual BOR change requir					

Completing this step should adjust the timelines for all the subitems based on the dependencies set up on the board. It will also adjust the timeline of the overall project and the timeline for that project on the AP Onboarding Overview board.

8. Scroll through the subitems - specifically, looking at the duration column to see if any need to be adjusted for the block transfer you are working on.

Skip Step 9 if no changes need to be made.

9. If the duration for a subitem needs changed, click and highlight the value that is currently in that column and then type in the new value.

Repeat for each subitem that needs their duration adjusted.

Task	Onboarding Coord...	Start Date	End Date	Duration	Progress	Kickoff	Information Gath...	Da
Overall Project 37	TM	Jun 1, 2023	Aug 21, 2023	82	0%	Not Started	Not Started	
Subitem	Task	Assigned to	Timeline	Duration	Progress	Depende...	****	+
1.1	Partner Kickoff Meeting	AAS-OB	Jun 1	1	0%			
1.1.1	Inform AA AM Team Management of Project Kickoff	AAS-OB	Jun 1	1	0%	1.1		
1.2	Account Management System (ex. EPIC, BKB)	AP	Jun 1	1	0%	1.1		
1.3	Benefits Administration System (ex. Easie, Navigator)	AP	Jun 1	1	0%	1.1		

Completing this step should adjust the timelines for all the subitems based on the dependencies set up on the board. The only scenario in which a timeline would be adjusted is if a Project is taking significantly longer and the duration need to be updated to reflect this.

[Click to go to next steps: Updating Milestone's Status Columns](#)

Page Last Updated/Reviewed: 01/14/2025

Default Status:

The default status is set as "Not Started".

Example:

Buzutto ⓘ ☆

Main Table | Gantt Chart | Chart | +

New Task Search Person Filter Sort Hide ...

Project Plan

Task	Progress	Kickoff	Information Gath...	Data Analysis
Overall Project 37	0%	Not Started	Not Started	Not Started

Subitem	Timeline	Duration	Progress	Depende...
1.1	Jun 1	1	0%	-
1.1.1	Jun 1	1	0%	1.1
1.2	Jun 1	1	0%	1.1

In Progress Status:

When a milestone task has started, go to the board and mark it "In Progress" by clicking the Status column corresponding with that milestone and selecting "In Progress"

Example:

Buzutto ⓘ ☆

Main Table | Gantt Chart | Chart | +

New Task Search Person Filter Sort Hide ...

Project Plan

Task	Progress	Kickoff	Information Gath...	Data Analysis
Overall Project 37	0%	Complete	In Progress	Not Started

Subitem	Timeline	Duration	Progress
1.1	Jun 1	1	0%
1.1.1	Jun 1	1	0%
1.2	Jun 1	1	0%
1.3	Jun 1	1	0%
1.4	Jun 1	1	0%
1.5	Jun 1	1	0%
1.6	Jun 1	1	0%

Complete
In Progress
Road Block
Not Started
Edit Labels

Road Block Status:

When there is a major issue that prevents the project from moving forward (i.e. AP asks to postpone block transfer for an extended period or block transfer is cancelled), go to the board and mark that milestone with "Road Block" by clicking the status column corresponding with that milestone and selecting "Road Block."

Example:

Buzutto ⓘ ☆

Main Table | Gantt Chart | Chart | +

New Task Search Person Filter Sort Hide ...

Project Plan

Task	Progress	Kickoff	Information Gath...	Data Analysis	EPIC Build	BC
Overall Project 37	0%	Complete	In Progress	Road Block	Not Started	Not Started

Subitem	Timeline	Duration	Progress	Depende...
1.1	Jun 1	1	0%	-
1.1.1	Jun 1	1	0%	1.1
1.2	Jun 1	1	0%	1.1
1.3	Jun 1	1	0%	1.1
1.4	Jun 1	1	0%	1.1
1.5	Jun 1	1	0%	1.1
1.6	Jun 1	1	0%	1.1

Complete
In Progress
Road Block
Not Started
Edit Labels

Completed Status:

When you have completed a milestone task, go to the board and mark that milestone as completed by clicking the status column corresponding with that milestone and selecting "Complete."

Example:

Buzutto

Main Table

Gantt Chart

Chart

New Task

Search

Person

Filter

Sort

Hide

Project Plan

Task	Progress	Kickoff	Information Gath...	Data Analy
Overall Project 37	0%	Complete	Complete	Not Star
Subitem				
1.1	Jun 1	1	0%	
1.1.1	Jun 1	1	0%	
1.2	Jun 1	1	0%	
1.3	Jun 1	1	0%	
1.4	Jun 1	1	0%	
1.5	Jun 1	1	0%	
1.6	Jun 1	1	0%	

Any time you change a status on this board, it will automatically update the status for that same milestone on the **AP Onboarding Overview** board corresponding with the project you are working on.

[Click to go to next steps: Updating Subitem Progress %](#)

Page Last Updated/Reviewed: 01/14/2025

Update the progress % as you work on each subitem. You do this by clicking on the progress column cell that corresponds with the subitem you are working on and typing in the progress percentage for that subitem. Keep updating the progress % for each subitem as you complete more of the project until the project is complete and all subitem progress % equal 100%.

Partial Progress Example:

Midwest BL... Integrate Automate Invite / 5 ..

Main Table Gantt Chart Chart +

New task Search Person Filter Sort Hide Group by

Heritage, Wallstreet, Presidio Project Plan

Task	Progress	Information Gat
Overall Project 31	52.5%	Complete

Subitem	Timeline	Duration	Progress
3.1	Jun 25, '24	1	100%
3.2	Jun 25, '24 - J...	2	100%
3.4	Jun 21, '24	1	100%
3.5	Jun 26, '24 - J...	24	50%

Completed Subitem Example:

Midwest BL... Integrate Automate Invite / 5 ..

Main Table Gantt Chart Chart +

New task Search Person Filter Sort Hide Group by

Heritage, Wallstreet, Presidio Project Plan

Task	Progress	Information Gat
Overall Project 31	52.5%	Complete

Subitem	Timeline	Duration	Progress
1.1	Apr 10, '24	1	100%
1.2	Apr 10, '24 - A...	7	100%
1.3	Apr 11, '24 - A...	19	100%
2.1	Apr 10, '24 - ...	52	100%
2.2	May 31, '24 - J...	25	100%

As you update the progress for each subitem, the overall project progress will automatically update. The overall project progress % will also update on the **AP Onboarding Overview** board.

Example:

Midwest BL... Integrate Automate Invite / 5 ...

Main Table Gantt Chart Chart +

New task Search Person Filter Sort Hide Group by

Heritage, Wallstreet, Presidio Project Plan

Task	Progress	Information Gath...
Overall Project 31	52.5%	Complete

Subitem	Timeline	Duration	Progress
1.1	Apr 10, '24	1	100%

Note: **Weekly Status Update** subitem can be totaled at 100% progress after the completion of the project

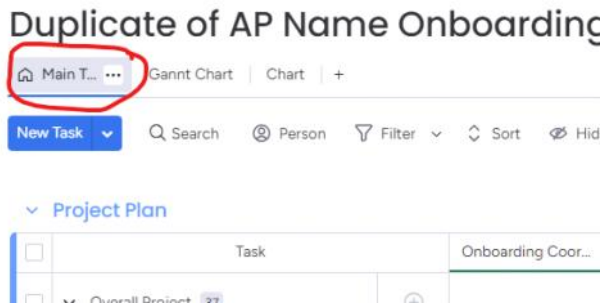
[Click here for instructions on how to share project board for weekly status reports to AP and management](#)

NEXT STEP: Adding Initial Data to Board

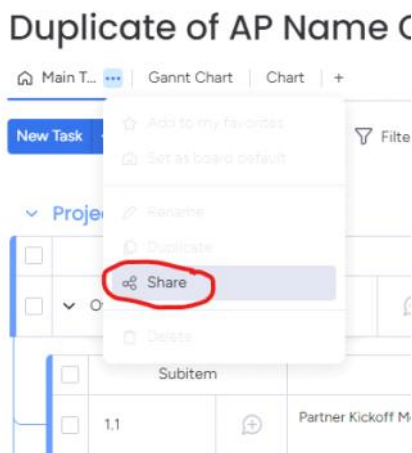
Sharing- No App Login Needed

Access Type: View Only

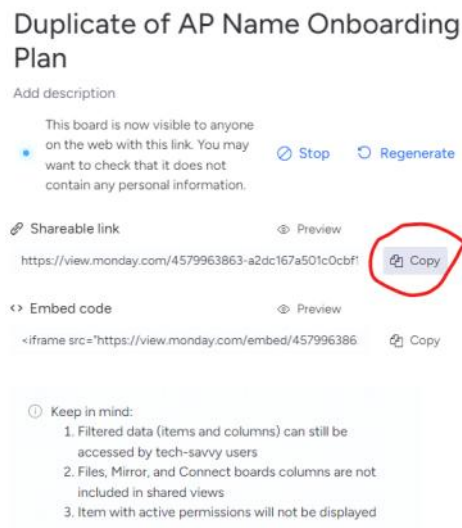
Hover over the Main Table tab at the top left side of the screen and click the ... icon that appears.



Click Share



4. Click the copy button that corresponds with the "shareable link" section.



5. Paste the link in a/an email/document/chat

6. Send to person you want to have view only access to the board

Example of what they will see:

Get started with your own board [Sign up now](#)

Duplicate of AP Name Onboarding Plan

Project Plan										
<input type="checkbox"/>	Task	End Date	Duration	Progress	Kickoff	Information Gat...	Data Analysis	EPIC Build	BOR Changes	Ease/Suvaun B...
<input type="checkbox"/>	Overall Project 37	Aug 21, 2023	1	1	Complete	Working on it	Working on it			
<input type="checkbox"/>	Subitem	Task	Assigned to	Timeline	Duration	Progress	Depende...			
<input type="checkbox"/>	1.1	Partner Kickoff Meeting	AAS-OB	Jun 1	1	0%	-			
<input type="checkbox"/>	1.1.1	Inform AAAM Team Management of Project Kickoff	AAS-OB	Jun 1	1	0%	1.1			
<input type="checkbox"/>	1.2	Account Management System (ex. EPIC, BKB)	AP	Jun 1	1	0%	1.1			
<input type="checkbox"/>	1.3	Benefits Administration System (ex. Ease, Navigator)	AP	Jun 1	1	0%	1.1			
<input type="checkbox"/>	1.4	Suvaun utilization (Y/N)	AP	Jun 1	1	0%	1.1			
<input type="checkbox"/>	1.5	Number of Groups in Block Transfer Request	AP	Jun 1	1	0%	1.1			
<input type="checkbox"/>	1.6	Compliance/Notifications - How are notifications (State COBRA, COB...	AP	Jun 1	1	0%	1.1			
<input type="checkbox"/>	1.7	GAAssignments - Are any of the transferred groups assigned to a GA...	AP	Jun 1	1	0%	1.1			
<input type="checkbox"/>	1.8	Request Block Transfer Data Template - AP to provide defined data el...	AP	Jun 1 - 10	10	0%	1.1			
<input type="checkbox"/>	1.9	Pre-ER Communication: Email to AP, Benefits Overview Flyer, FAQ's	AAS-OB	Jun 1 - 2	2	0%	1.1			
<input type="checkbox"/>	2.1	Review Groups for Block Transfer - ensure all required data elements...	AAS-OB	Jun 1 - 7	7	0%	1.8			
<input type="checkbox"/>	2.2	90 Day Renewal Window - identify groups within the 90 day window ...	AAS-OB/AP	Jun 4	1	0%	2.1			
<input type="checkbox"/>	2.3	Identify carriers that require manual BOR change requests (ex: Healt...	AAS-OB	Jun 5	1	0%	2.1			
<input type="checkbox"/>	2.3.1	Create and share Manual BOR Letter with AP for signature	AAS-OB/AP	Jun 6	1	0%	2.3			

Powered by monday.com

Page Last Updated/Reviewed: 02/12/2025

Friday, May 10, 2024 3:35 PM

In order to access all necessary boards, you will first need access to the **Acrisure Digital Team Workspace**

- Email Heather Struck for access

Next, you will need access to the **Digital Service Center Onboarding** board, which includes the boards listed below.

AP Onboarding Plan Template

BOR Tracker Template

AAS Onboarding Volume

AP Onboarding Overview

You will also need to be added as an owner to the following: **AAS Onboarding Overview Board Automations**

AAS Onboarding Volume – to monitor overall project statistics for all lines of business (EB/PL/CL). Visible to ADS Leadership

AAS Onboarding Volume Integrate

Main Table Group Count Dashboard Policy Count Dashboard Revenue Dashboard

New ap block transfer Search Person Filter Sort Hide Group by

Employee Benefits - Onboarding Volume

Ap block transfer	AP Location	AP Code	Platform	OB Coordinator	Overall Status	Kickoff Date	GP Count-Initial	# GPs	# GPs
Echelon Advisors	TX	AP-ATP-ECH	South		Complete	Jul 31, 2023	26	4	4
Bell Anderson Agency	WA	AP-BAA-BAA	Northwest		Complete	Jun 11, 2023	259	11	0
IBTX	TX	AP-ATP-IBT	South		On Hold	Jul 26, 2023	23	0	0
Carlisle Insurance Agency	TX	AP-ATP-CLJ	South		Complete	Jul 31, 2023	49	5	1
Insurance Resource Group -IRG	WA	AP-BAA-IRG	Northwest		Complete	Jul 26, 2023	50	3	0
Sound Benefit Services -SBS	WA	AP-BAA-SBS	Northwest		Complete	Jul 26, 2023	35	5	0
Vantreo Insurance Brokerage	CA	AP-VIB-VIB	West		Complete	Aug 1, 2023	104	8	0
GCH Insurance Group	KY	AP-GCH-GCH	Southwest		In Progress	Aug 25, 2023	51	5	

AP Onboarding Overview – view list of ongoing team projects and their overall status; to add project initially; rolls up into the AAS Onboarding Volume board

AP Onboarding Plan Template

Main Table Gantt Chart Chart

New task Search Person Filter Sort Hide Group by

Project Plan

Task	Onboarding Coord...	Timeline	Progress	Information Gat...	Data Analysis	Kickoff
Overall Project 38		Aug 25, '23 - Dec 24	0%	Not Started	Not Started	Not Started

Subitem	Task	Assigned to	Timeline	Duration
1.1	Pull & Send to AP/Platform from ADS Service Center Opportunities Report	ADS-Mike	Aug 25, '23	1
1.2	AP review groups from the data pull & marks groups yes/no for Block Transfer to ADS	AP	Sep 2, '23 - S...	10
1.3	Ask AP Discovery Questions 1.3.1. Account Management System (ex. EPIC, BKB) 1.3...	AP	Sep 2, '23	1
2.1	Review Groups for Block Transfer - ensure all required data elements are provided. (...)	ADS-OB	Sep 3, '23 - S...	7
2.2	Finalize Groups that are part of Block Transfer - share with AM Team, Reg. Affairs, E...	ADS-OB	Sep 10, '23 - S...	3

Project Plan Board - personalized progress tracker for ongoing project; rolls up into AP Onboarding Overview and the AAS Onboarding Volume board

Test Board - CW

[Integrate](#) [Automate](#) [Invite / 3](#)[Main Table](#) [Gantt Chart](#) [Chart](#)[New task](#) [Search](#) [Person](#) [Filter](#) [Sort](#) [Hide](#) [Group by](#)

Project Plan

Task	Subitems Du...	Subitems W...	Subitems Pr...	Onboarding Coor...	Timeline	Progress	Information Gat...	Data Analysis	Kickoff	Ease/Suvaun Build	EPIC Build
Overall Project 38	512	49.65	1.490%		Mar 29 - Jul 31	9.7%	Complete	Complete	Complete	In Progress	Not Started
Subitem	Task	Assigned to	Timeline	Duration	Progress	Depe...	Weighted Pr...				
1.1	Pull & Send to AP/Platform from AAS Service Center Opportunities Report	AAS: Mike	Mar 29	1	100%		1				
1.2	AP review groups from the data pull & marks groups yes/no for Block Transfer to AAS	AP	Apr 6 - 15	10	100%	1.1	10				
1.3	Ask AP Discovery Questions 1.3.1.Account Management System (ex. EPIC, BKA) 1.3...	AP	Apr 6	1	100%	1.1	1				
2.1	Review Groups for Block Transfer - ensure all required data elements are provided. [...]	AAS: OB	Apr 7 - 13	7	100%	1.3	7				
2.2	Finalize Groups that are part of Block Transfer - share with AM Team, Reg. Affairs, E...	AAS: OB	Apr 14 - 16	3	100%	2.1	3				
2.3	Ease Group Identification - AAS: OB to partner with Ease to query Group against Ea...	AAS: OB	Apr 16 - 19	4	65%	2.2	2.6				
2.4	Suvaun - identify groups leveraging the quoting tool	AP	Apr 17 - 19	3	60%	2.2	1.8				
2.5	BOR Transition Renewal Window - identify groups within the window where AP is re...	AAS: OB/AP	Apr 17	1	100%	2.2	1				

Page Last Updated/Reviewed: 02/12/2025

Navigation & Tips/Tricks

Friday, May 10, 2024

3:59 PM

Joint Reg. Affairs/ BSIT BOR Tracker

Thursday, December 21, 2023

11:46 AM

Description:

This board captures all the BOR requests being processed by our Reg. Affairs Teams

Link: <https://acrisure-corp.monday.com/boards/8347580705>

Board Permissions

People	Permission Level
Taylor Montgomery Leeah Grunwell	<ul style="list-style-type: none">• View Everything on the board• Edit everything on the board
Everyone else w/ board access	<ul style="list-style-type: none">• Edit only the columns their team has permissions to

Carrier Contacts, Assignments, & Writing #'s

Monday, May 12, 2025 10:00 AM

Description:

This board captures all Acrisure Digital Solutions Carrier Appointments, writing #'s and Carrier Contact Information

Link: <https://acrisure-corp.monday.com/boards/8446060950>

Board Permissions

People	Permission Level
Taylor Montgomery Leeah Grunwell Garrison Barton Megan Adkins	<ul style="list-style-type: none">• View Everything on the board• Edit everything on the board
Everyone else w/ board access	<ul style="list-style-type: none">• Read Only