SVC Reports - Details

Tuesday, May 23, 2023 1:15 PM

Scheduled by Katie sent to Katie/Ashley on the 1st of each month

Sent to AST with monthly reports: Report List_Servicing.docx

1. **Book of Business** – sorted by expiration date
    - This report is a snapshot in time of all active lines of business for active groups in Epic.
        - For a Package Policy, each line of business will display as: GPK1/"*Line type"*.

2. **Missed Renewals** – sorted by expiration date
    - **THIS REPORT REQUIRES ACTION**
    - This report includes expired policies on active accounts that haven't had a renewal or cancel action performed on them.
    - The report will show anything not "renewed" in the prior 365 days from the date the report is generated.
    - A second copy of the Missed Renewals report is scheduled to be sent directly to Brian/Team Leads on the 15th of every month to track progress/address as needed

3. **Upcoming Renewal Forecast** – sorted by expiration date
    - This report is a snapshot in time of your upcoming renewal policies.
    - It will include all active policies with an expiration date between the 1st of the current month through 120 days into the future.
    - If a policy has already been renewed in Epic, it will not be included on this report.

4. **Mono-Line Report** – sorted by expiration date
    - This report is created manually using the Book of Business as a base
    - This report includes all accounts with only 1 active line of business in Epic.
    - Package policies are excluded from this report (GPK1/"*Line type")* as Epic views a Package as a single policy
    - Compliance Service place holder policies are excluded from this report (policy types beginning with GX)

5. **Policy ADC Report** – sorted by expiration date
    - This report includes a list of all active lines of business and any Agency Defined Categories that have been added to the lines.
    - There will be duplication of lines of business on the report where there is more than one ADC added in Epic. You will see a row for each ADC.

6. **In-Process Policies Report** – sorted by expiration date
    - This report includes all lines of business (current and expired) with In-Process service summary rows in Epic.
    - This is an auditing report that should be utilized for system cleanup.

7. **Active Account List with AM's, Industry Type, & AP Source** – sorted by group name alphabetically
    - This report includes all active accounts, the AM assigned, industry type of the group, and the AP Source Agency Defined Category.
    - All accounts should include an AP Source Agency Defined Category
        - If you cannot locate a group on this report, review the account to confirm that there is an account level AP Source ADC

Monthly SVC Report Procedures

Thursday, January 25, 2024 11:32 AM

- The monthly SVC reports listed HERE will be emailed to Katie & Ashley on the 1st of the month.
- Reports need to be compiled into one spreadsheet with a tab for each report
  - Add Filters to all report column headers
  - Change AM "Name" Columns to read "Account Manager"

- Create Monoline Report
  - Create a tab with a copy of the Book of Business Report and name it "Monoline Policies"
  - Move tab after the Upcoming Renewals Forecast tab
  - Update page header to "Monoline Policy List"
  - Remove all rows with policies that have a compliance service policy type (beginning with GX)
  - Highlight all Group Names in Column C
  - Identify duplicates using Conditional Formatting
  - Filter for just that color that was applied and delete those rows. Remove filter.
  - Confirm that all policies that are part of a package are removed from report - check for line type of GPK1/*"Line type"*
  - Remaining policies will be the list of monoline groups

- Add in Additional Pivot tables for Accounts by SIC Code and Growth Opportunities:

Accounts by SIC code

1. First, update Name column for AM to read "Account Manager"

2. Add in column for Monoline (to identify if it is or is not a monoline group)
   - a. Highlight column of lookup codes on Active Accounts List tab
     - 1) You want to be highlighting the items where you want the "match" the be identified
   - b. Once highlighted, click on Conditional Formatting, and then New Rule
   - c. Click Use a formula to determine which cells to format
   - d. Enter the match formula
     - 1) =match(type in first cell in current tab range selected, range of cells in Mono-line tab, 0)
   - e. Select formatting to fill in matches
   - f. Click OK
   - g. The accounts found on the mono-line tab will be highlighted
   - h. Add filter to new Monoline column
   - i. Filter to only show highlighted accounts and type in "Monoline" in the added column
   - j. Filter to show the blanks in the Monoline column and type "Not Monoline" for the remaining rows
   - k. Pivot off of Active Account List tab to create a new tab
     - 1) Rename the tab - Account by SIC Code
     - 2) Add Account Manager to filters
     - 3) Add SIC Description and Account name to Rows
       - 1) Click on Row Labels and select SIC Description in the Select Field drop down
       - 2) Uncheck the Blanks to remove from pivot
     - 4) Add Monoline to Columns
     - 5) Add Account Name to Values (count of)
     - 6) Add name of table into the first row: List of Accounts by SIC Code Description (excluding accounts with no SIC)
     - 7) The pivot table is now complete
   - **l. Remove conditional formatting rule from Active Account List tab to get rid of highlighting in lookup code column**

Growth Opportunities

1. First, update Name column for AM to read "Account Manager" in Upcoming Renewals Forecast tab

2. **Upcoming Renewals Forecast (with Monoline policies identified)**
   - a. Go to Upcoming Renewals Forecast tab
     - i. Add in column for Monoline (to identify if it is or is not a monoline group)
     - ii. Highlight column of lookup codes on Upcoming Renewals Forecast tab
       - 1) You want to be highlighting the items where you want the "match" the be identified
     - iii. Once highlighted, click on Conditional Formatting, and then New Rule
     - iv. Click Use a formula to determine which cells to format
     - v. Enter the match formula
       - 1) =match(type in first cell in current tab, range of cells in Mono-line tab, 0)
     - vi. Select formatting to fill in matches
     - vii. Click OK
   - b. The accounts found on the mono-line tab will be highlighted
   - c. Add filter to new Monoline column
   - d. Filter to only show highlighted accounts and type in "Monoline" in the added column
   - e. Filter to show the blanks in the Monoline column and type "Not Monoline" for the remaining rows
   - f. Pivot off of Upcoming Renewals Forecast to create a new tab
     - i. Rename the tab: Growth_Full List & Monoline
     - ii. Add Account Manager to filters
     - iii. Add Account name and Line Type Description to Rows
     - iv. Add Expiration date to the top of the Rows
       - 1) Keep the Months grouping and remove the actual expiration date field & days field
     - v. Add Line Type Description to Values
       - 1) Update name of column to "Line Count"
     - vi. Add name of table into the first row: Full List of Upcoming Renewals - Policy Count by Expiration Date (+120 days)
     - vii. The first Pivot table for this tab is now complete

   g. Create new pivot table from the Upcoming Renewals Forecast tab and check of the box to "Add this data to the Data Model"
   h. Insert next to the existing pivot table created above on the Growth_Full List & Monoline
      i. Add Account Manager to Filters
      ii. Add Account Name to Rows
      iii. Add Expiration Date to Rows above Account Name
         1) This should default to a breakout by Months
      iv. Add Monoline to Columns
      v. Add Account Name to Values
         1) Click on the Field and then click Value Field Settings
         2) Choose Distinct count for value type
         3) Update name to "Group Count"
      vi. Add name of table into the first row: Group Count by Expiration Date (+120 days) - Monoline vs. Not Monoline
      vii. The second Pivot table and this tab are now complete

3. **Growth Opportunities-Ancillary**
   a. Add a new tab and rename it: Growth_Panel Carriers-Ancillary
   b. From the Growth_Full List & Monoline: copy the Policy Count by Expiration Date title and pivot table and paste into the Growth_Panel Carriers-Ancillary
      i. Remove the words "Full List" from the beginning of the table name and add the words "Ancillary only" to the end of the table name
      ii. On the Row Labels filter, update the Select field to the Line Type Description
         1) Uncheck Group Medical and all other Medical Policy type descriptions to remove them from the pivot
      iii. Add the Premium Payable field into the Rows under the Account Name
      iv. The pivot table is now complete
   c. **Remove conditional formatting rule from Upcoming Renewals Forecast tab to get rid of highlighting in lookup code column**

- **Use Service Report List for Micro Fees to identify groups with a Micro Fee on Upcoming Renewals Forecast tab:**
   - Add the service list report to the monthly servicing reports temporarily to perform a match and identify groups that have an open service line for a Micro Fee
   - Perform match on the Upcoming Renewals Forecast tab, highlighting the lookup codes for accounts listed on the open services report
   - Add a column called "Group has Micro Fee" at the end of the spreadsheet
   - Filter down to accounts that were a match (highlighted)
   - Add "Yes" in the newly added column
   - Clear filter and remove conditional formatting
   - **Delete the service list report from the monthly report pack**

- **Once Pivot tables are added in, send to AAS_EBT with PDF** instructions using the email template saved in the Scheduled SVC Reports OneDrive folder. **BCC yourself as you may not get a copy.**
  PDF Instructions are located here:
  1. ONEDRIVE Collaboration > ADS Tech Platform Providers > Epic > Training Resources & Presentations

- Save completed report spreadsheet into current month folder under the following file path:
- « AAS_EB - Documents > Shared > 1. ONEDRIVE Collaboration > Onboarding > Reporting > Scheduled SVC Reports

120 Day Renewal Letters (Email to Svc)

Friday, March 1, 2024 9:34 AM

Previously an automated email would be sent to any group that had policies that fell in the 120 day renewal range on the **120 Day Renewal Letter Report** that was generated on the 1st of each month.

We ran into issues when emails were being sent to groups that were still in-flight and not BOR'd to us yet, so that report was unscheduled and is not currently being used.

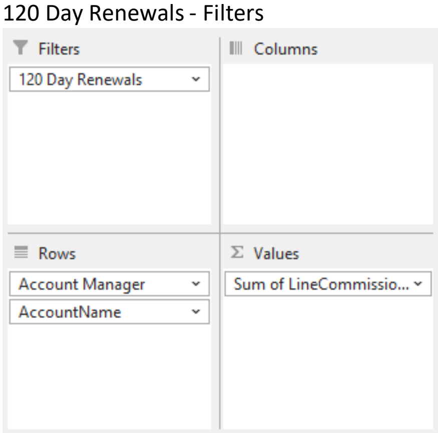
Since the renewal emails still need to get sent out, on the 1st of the month we now send a copy of **the Renewal Workflow Activity Report** to the Team Leads using the email template titled **"120-Day Renewal Emails"** which is saved in the following path in File Explorer.

Shared > 1. ONEDRIVE Collaboration > Onboarding > Reporting > Scheduled SVC Reports

The instructions for scheduling the **Renewal Workflow Activity Report are here: [Scheduled Reports]

Update the 120 Day Renewal Report

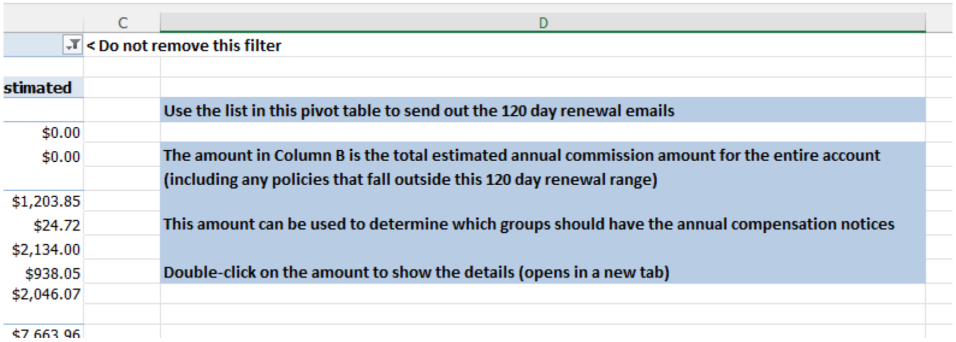
- Rename main report tab to "120 Day Renewal Report"
- Wrap text for easier viewing and add filters
- Update Name column to "Account Manager"
- Bring over a copy of the Book of Business tab from the Monthly Servicing Report Pack to a new tab on the 120 Day Renewal Report and name it " Full Active Book of Business"
- Alphabetize Account Name column
- Add a column after Expiration Date and name it "Days until expiration from *date of report*"
  - In the first cell insert the following formula adjusting the date in blue: **="Days to Expiration: " & DAYS(E3,DATE(2024,12,1))**
  - Copy the formula down to the other cells
  - Copy and paste as values
- Add a column at the end of the report named "120 Day Renewals"
  - Perform the match function to mark the groups on the BOB that are on the 120 Day tab
  - Filter for matches and put a Yes in the new column
  - Remove conditional formatting and filters
- Add a pivot off of the Book of Business tab and name it "Pivot"
  - Account Manager - Rows
  - Account Name - Rows
  - Line Commission Estimated - Values (SUM)
  - 120 Day Renewals - Filters



  - Update commission column to Currency
  - Remove Subtotals & Grand totals
  - Filter out blanks for 120 Day Renewals filter
  - Add wording to the right
    - **< Do not remove this filter**
    - **Use the list in this pivot table to send out the 120 day renewal emails**
    - **The amount in Column B is the total estimated annual commission amount for the entire account (including any policies that fall outside this 120 day renewal range)**

      This amount can be used to determine which groups should have the annual compensation notices

      Double-click on the amount to show the details (opens in a new tab)



The only things needed on the email before sending is to attach the **120 Day Renewal Activity Report** for that new month and add your signature. *Our email template already has the email template that they are told to use attached.

Mid-Month Re-Run of Missed Renewals Report

Thursday, January 25, 2024 11:32 AM

- The Missed Renewals Report is scheduled by Katie to be emailed to Brian, the TL's, & Ashley on the 15th of the month. This wa s requested by them so they could have an updated version of the report and make sure progress was made from the report that ran on the 1st.

- Drop a copy of the file into current month folder under the following file path and name it "Missed Renewals Report (mid -month re-run)_*date*"

« AAS_EB - Documents › Shared › 1. ONEDRIVE Collaboration › Onboarding › Reporting › Scheduled SVC Reports

ICON Report

Monday, July 1, 2024 9:19 AM

The ICON Report is scheduled by Katie to be emailed to herself, Mike and Ashley on the 1st of each month

Mike will then attach a copy of the report in a folder shared with the ICON team

The report shows accounts that had renewals in the prior month which the ICON team will use to make contact to try to sell their retirement product