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| A close up of a logo  Description automatically generated  Commercial Lines  Workflows & Procedures  *For*  Acrisure Partners West Coast Insurance Services, LLC  A picture containing text, sign  Description automatically generated |

# **How to Use this Document**

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| This document contains valuable information relevant to the usage of EPIC, including **Epic Basics**, day-to-day **Workflow**, and **Job Aids. DO NOT PRINT THIS DOCUMENT.**  For optimal usage:   * Click the **View** menu at the top in the Microsoft Word toolbar. * Checkmark **Navigation Pane**   A screenshot of a computer  Description automatically generated   * The left pane will open and show a listing of topics.   A screenshot of a computer  Description automatically generated   * Click on the topic to jump to that section/page. * Hyperlinks within the document will lead to specific pages or Job Aids.   A close-up of a card  Description automatically generated   * Some hyperlinks will connect to a webpage outside of the document.   A close-up of a sign  Description automatically generated |

# **Epic Browser**

## **Logging in**

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| 1. Open a web browser.    1. Chrome    2. Edge 2. Enter URL:    1. **Production/Live**: <https://acris03.appliedepic.com/#/>    2. **Test/Training**: <https://ve061t1web.appliedepic.com/#/> |

## **Add the URL as a bookmark in the Chrome or Edge Browser**

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| 1. In the browser URL address field, enter <https://acris03.appliedepic.com/#/>; press the keyboard enter key. 2. Add to Bookmarks/Favorites as follows:  |  |  | | --- | --- | | **CHROME**    Click the star icon  Enter a name for the bookmark; click DoneA screenshot of a computer  Description automatically generated | **EDGE**    Click the star icon  Enter name and add to Favorites Bar; click DoneA screenshot of a computer  Description automatically generated | |

## **Browser Tabs**

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| Browser tabs will open at the top when accounts are located and selected.  A screenshot of a computer  Description automatically generated  Use browser tools like Tab Grouping and Zoom, if desired.  To prevent connection issues, close out of a client by clicking the X above the Logout button, NOT the x in the browser tab  A screenshot of a computer  Description automatically generated |

## **Connection Suite & New Functionality** Popups

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| The Connection Suite is required to ensure full functionality and connection within Epic Browser. Acrisure IT manages all updates in the background for the Connection Suite Plugin. **Ignore these popups.** If you are receiving an error, follow the instructions to [hard shutdown](#_Logging_out_of) to ensure there’s a clean connection to all services running on your computer. If you are experiencing functionality issues after shutting down, submit a ticket to [support@acrisure.com](mailto:support@acrisure.com).  A screenshot of a computer  Description automatically generated***Reminder: A hard shut down of your computer should be done at the end of each workday.***  **A screenshot of a computer  Description automatically generated**  If you are interested in learning what changed in recent updates, click the link to view the Release Notes. |

## **Logging out of Epic**

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| **\*\*IMPORTANT\*\***  When **closing out of Epic,** be sure to click the **LOGOUT** button at the top right in the blue Options Bar. Do not X out or Epic will not close properly and may cause issues when signing in again.  A blue box with white text  Description automatically generated **NO** |

**Shutting Down Computer**

|  |  |  |  |  |  |  |  |  |
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| A red and white stop sign  Description automatically generated  **\*\*IMPORTANT\*\***  Log out of Epic and SHUT DOWN your computer **at the end of each workday.**   |  |  | | --- | --- | | 1. In Epic, click the Logout Button |  | | 1. Shut down the computer by clicking the Start Menu | A white square logo on a black background  Description automatically generated | | 1. Click Power | A close up of a word  Description automatically generated | | 1. Click Shut Down |  |   **NO** |

# **EPIC BASICS**

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## **Home Base**

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| 1. **Open Activities** (suspense, follow up, to-do list)    * Use “Select Columns” to add columns to your view.    * The position of the columns can also be changed by clicking and dragging the column headers to the desired location.    * Sort columns in ascending or descending order by clicking on the column header. 2. **Activity at a Glance** – displays information about the highlighted activity. 3. **Activity Tasks** OR **Last Note Entered** – if a task within an activity is assigned to you, the task will appear here only if the activity above, associated with the task, is highlighted. The view can be changed from “Activity – Tasks” to “Last Note Entered” by clicking the dropdown arrow and selecting the appropriate option. 4. **Report Quick View** – Created reports can be sent to Report Quick View for easy access. Just click the link and the report will open. Data displayed is in real-time and will be refreshed as of the date it is opened. 5. **New/Waiting** – If your agency has opted to use Front End Scanning, scanned mail can be accessed by clicking the “Unrouted Attachments” link. The number of items in your “inbox” will also display. 6. **Navigation Panel** – Items listed here will direct you to distinct parts of Epic or the client’s account while on the locate screen or within the client account. Items listed change depending on which screen is being utilized. This is known as the “View” panel. 7. **Blue Options Bar** – Each icon contains action options, which change depending on which screen is being opened. Think of this as the “Do” bar. 8. **Log Out button** – Clicking this button will close all the open screens/windows and log out of Epic. 9. **Locate** – Click the dropdown arrow to see the list of the last 20 accounts accessed |

## **Activities & Tasks**

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| **Activities in Epic perform three essential functions:**   * Add a record to the client file for the action performed * Allow a follow up or Open Activity as a reminder to do something at a current or future date * Permanently document the file with the use of Notes within Activities   **Tasks in Epic can supplement an activity:**   * Can be used as a to-do list related to that activity or to share work with another user * Task owners and start dates can be independent from the activity   ***NOTE: Activities/notes cannot be deleted or moved to another account. While the activity description is editable, the notes area cannot be altered and is date/time stamped.*** |

### **Manage Activities from Home Base**

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| **Select Columns** | A close up of a sign  Description automatically generatedCheck or uncheck the columns desired to reflect within the Home Base View |
| **Customize View** | A screenshot of a computer  Description automatically generatedAllows the addition of other Employee activities to reflect within your own open  activities list (if given permission) |
| **Right Click to Manage** | * **Close Activity** – *follow up action is completed* * **Add Note** – *add notes related to the process which is still pending* * **Add Task** – *assign a portion of the activity process to someone else to work on* * **Change Follow-up Date/Time** – *if the deadline for completing the activity can be moved* * **Change Who/Owner** – *reassign the activity for someone else to take care of, which will move to their Home Base* * **View All Notes** – *Read all notes related to a specific activity process*   A screenshot of a computer  Description automatically generated   * **Take Ownership** – *If the activity is assigned to another person or a work group, it can be reassigned to yourself*   ***Note: multi-select activities (CTRL + Click) to apply the above actions to multiple activities at one time.*** |

### **Manage Tasks from Home Base**

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| **Customize View** | A screenshot of a computer  Description automatically generatedAllows the addition of other Employee tasks to reflect within your own open  activities list (if given permission) |
| **Right Click to Edit** | * **Description** * **Owner** *–* *reassign the activity for someone else to take care of, which will move to their Home Base* * **Status** *– mark as cancelled, completed, in-progress or not applicable as needed* * **Start/Due date**s – *amend if the deadline for completing the task must be moved* * **Add Note** - *add notes related to the process which is still pending*A screenshot of a computer program    Description automatically generated |

## **Client Accounts**

### **Locate Account**

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| A blue sign with white text  Description automatically generated   * Click the **Locate** button to **search** for existing clients   **Locate Options:**   * + **Account/Business Name** – *contains full or partial account name*   + **Claims: Additional Party** – by involvement type, name, or phone number   + **Insurer Claim#** - must be exact & complete   + **Internal Claim#** - must be exact & complete   + **Date of Loss** – *range*   + **Last name, first name** – *begins with* and will search account detail name field and individual contacts   + **Lookup Code** – *begins with*   + **Phone Number** – must be exact & complete   + **Policy #** - *contains*   + **Prior Account ID** – *begins with* (from your prior system)   + **Relationship** – relationship type and then account name   + **Submission ID** – *begins with* (in marketing)   + **Vehicle Registration Number** * Click the **Locate** button to **add new** client accounts. * Click the **drop-down arrow** on the Locate button to access the last 20 accounts accessed (includes client accounts, employee accounts, company accounts, etc.)   A screenshot of a computer  Description automatically generated |

### **Close Out of an Account Record**

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| Locating and selecting an account will create a new tab in the browser. **Close the account record by clicking the X above the Logout button** NOT by clicking the x within the tab itself.  A screenshot of a computer  Description automatically generated |

## **Contacts**

### **Overview**

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| **Individual Contact** | This is an additional individual contact (person) on the account. By choosing an individual contact additional fields are available, such as date of birth, SSN, marital status, driver’s license number, etc. |
| **Primary Contact** | This is an **individual contact** and should be selected as the primary contact for the account. To make a contact **Primary,** click **ACTIONS > Change Primary Contact**. The Primary Contact is displayed in the Rolodex Card in the bottom left corner in the client’s account. |
| **Main Business Contact** | This is the **Primary Named Insured** on a Business account. This contact is added when a prospect or insured is added. Any Business Contact can be changed to a Main Business Contact by **ACTIONS > Change Main Business Contact**. A main business contact should have a NAICS number (required field), website and main business phone number, any additional Identification Numbers added such as FEIN may be added on the **Identification Numbers Tab**. A policy may only have 1 Main Business Contact. |
| **Category** | Contacts are categorized based on their relationship to the Account: Contact Only—Policy Only—Both Contact & Policy |
| **Description** | Add **Description** to best represent the position or role of the Contact (i.e., owner, manager, etc.) Select the appropriate description (s) for each Contact. This information is used for tracking and reporting. |
| **Contact**  **Classifications** | **Be sure to select** the appropriate contact classification. DM=Decision Maker; PC=Primary Contact   |  |  | | --- | --- | | Acrisure Webinars | 401k Plan Administrators | | \_\_User - Benefits Technology | \_EB Compliance Newsletter | | \_\_User - CSR24/Portal | \_EB Contract Signer | | \_\_User - HR Portal | \_EB Eligibility Contact | | \_\_User - Indio | \_EB HRLS Compliance Summit | | \_User Insite Portal | \_EB Payroll | | \_User - Succeed | \_EB Plan Admin | | \_User – Zywave | \_EB Payroll | | \_User – Zywave LMS | \_EB Plan Admin | | \_Certificates | \_EB Payroll | | \_Commercial (DM) | \_EB Plan Admin | | \_Commercial (PC) | \_Risk Management (PC) | | \_Cyber (DM) | \_Safety (PC) | | \_Cyber (PC) | \_Surety (DM) | | \_EB (DM) | \_Surety (PC) | | \_EB (PC) | \_Work Comp (DM) | | \_EB Compliance | \_Work Comp (PC) | |

### **Add Additional Contacts**

#### **Add Individual Contact**

|  |
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| 1. From the client’s account, click **Contacts** in the left navigation pane. 2. Click the **ADD** button.      1. Select the **Individual** radio button. 2. Enter First Name, Last Name 3. **Category:** Indicate whether contact only, policy only, or both contact & policy 4. **Description:** Select the appropriate description for this contact 5. Enter the address. If the account address is the same as the contact address, check the box for Use Account Address   Enter phone number (indicate if mobile) and email address ***NOTE: Email is a required field***. If the contact does not have an email address, enter [none@acrisure.com](mailto:none@none.com)     1. Click **DETAIL** to add additional information like date of birth, SSN, personal info, etc. 2. If not, click **FINISH**. |

#### **Add Business Contact**

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| 1. From the client’s account, click **Contacts** in the left navigation pane. 2. Click the **ADD** button.      1. Select the **Business** radio button. 2. Enter the Legal Business name. 3. **Category:** Indicate whether contact only, policy only, or both contact & policy 4. **Description:** Select the appropriate description for this contact. ***\*\*\*NOTE****: If Certificates are to be issued, please select* ***Named Insured.*** 5. Enter the **address**. If the account address is the same as the contact address, check the box for Use Account Address 6. Enter **phone number** (indicate if mobile) and **email address**.   ***\*\*NOTE: Email is a required field***. If the contact does not have an email address, enter [none@acrisure.com](mailto:none@none.com)   1. Click **Detail** 2. **Edit** the Contact Card 3. Enter **Website** 4. Enter **Contact Identifiers**  * **Contact Category** – Contact Only, Policy Only or Both * **Description -** if to be listed on a cert must be **Named Insured**  1. Enter **Identification Numbers** – **NAICS** and **SIC** 2. Click **Save Contact Summary** 3. **TAB: Business** 4. **Identification numbers** = FEIN, SSN, etc. 5. **Business Details =** Business Type, Date Business Started and Nature of Business |

#### **Inactivate a Contact**

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| 1. From the client’s account, click **Contacts** in the left panel 2. Make sure you have Inactivated ANY Indio or CSR24 Portal Login 3. Double-click on the **Contact** you wish to Inactivate. 4. To the Right, select **EDIT**   A group of words on a white background  Description automatically generated   1. Scroll to the bottom and under **Description** choose **1 – INACTIVE CONTACT**   A screenshot of a computer  Description automatically generated   1. Select **Save Contact Summary** 2. Little x out of the contact entry 3. Under the Description Column the Contact is listed as INACTIVE CONTACT   A screenshot of a computer  Description automatically generated |

# **Sticky Notes**

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| 1. Add a sticky note by clicking the NEW button in the blue Options Bar within the Client Account.      1. Enter a note. 2. Collapse the note by clicking the double-up arrows 3. Manage the Sticky Note by clicking the three vertical dots. 4. Delete the Sticky Note by clicking the X. 5. Add a New Sticky Note by clicking the +. |

## **Email**

### **Email from Distribution Manager**

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| As part of the normal workflow, when the ACORD form is ready to print/send, utilize the **Distribution Manager** to send documents.   1. From the **Distribution** Tab, set delivery option to **Email** 2. The **From** field defaults to your email address, however the sender can be changed 3. Add **Signature** (should default) 4. Add more than one recipient, cc, or bcc 5. Enter body of the email with full HTML functionality (change font size/color, add logos, pictures, change alignment, etc. 6. **A screenshot of a computer     Description automatically generated**If the documents need to be sent to multiple recipients, use the **Apply To** link to apply the email to all recipients 7. Click **Finish** to send |

### **Email from Attachments**

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| 1. From your client file, go to **Attachments** in the Navigation Panel 2. Highlight the attachment(s) to be sent *(Hold down the CTRL key to multi-select)* 3. Right-click or do an **Action > Send Via Email** 4. Populate your recipients, subject, body 5. A screenshot of a computer     Description automatically generated**Send** |

## **Faxing**

## **Faxing** **From Distribution** Manager

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| As part of the normal workflow, when the ACORD form is ready to print/send, utilize the **Distribution Manager** to send documents.   1. From the **Distribution** Tab, set the delivery option to **email.** 2. Select a “**From**” email address. 3. In the “**To**” field, type **1[fax number] @efaxds.com** 4. Enter the **Subject** line (required) 5. Enter message, if needed      1. Click **FINISH** to send. |

## **Attachments**

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| There are various ways to create or attach existing documents to a client account.   * Attach an existing document * Create a new document * Generate a blank fillable acord form   **\*\*PLEASE FOLLOW THE ATTACHMENT NAMING CONVENTION PROTOCOL** [**JOB AID**](#_JA.7_Attachment_Naming)**\*\*** |

### **Add Documents**

#### **Add Existing Documents**

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| 1. Click the plus (+) sign to **Add** 2. Select **Existing file** (from outside of Epic) 3. **Continue** 4. Select **Choose Files**    1. Select your document from your desktop, local or network drive    2. Click **Open**    3. Click **OK** 5. Attach to will automatically appear    1. Use the dropdown to select **activity** and use the lookup to select the applicable activity    2. Check the box to **Mark as an Important Policy Document** as desired *(this feature can be used to quickly find important documents such as policy dec pages, audits, endorsements or other policy documents)*    3. Fill in a **description** *(according to the naming convention)*    4. Select your **folder** (if not defaulted)    5. Check the box to make **Client** accessible *(if client uses CSR24 to obtain their documents)*    6. **Finish** |

#### **Drag & Drop Existing Documents**

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| 1. Drag your document to & release on an activity *(either open to full details or in list view)*    1. Attach to will automatically appear with the activity you selected to drop to    2. Check the box to **Mark as an Important Policy Document** as desired *(this feature can be used to quickly find important documents such as policy dec pages, audits, endorsements or other policy documents)*    3. Fill in a **description** *(according to the naming convention)*    4. Select your **folder** (if not defaulted)    5. Check the box to make **Client** accessible *(if client uses CSR24 to obtain their documents)*    6. **Finish**   **Drag & Drop works with documents in Outlook (classic version only), network folders, desktop, etc.**  Select the appropriate access level for security |

#### **Epic Plug-In for Existing Emails**

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| Attaching Email when Sent   1. Click NEW Email Button in Outlook 2. Checkbox Attach to Epic Box 3. Add Client Email Address in the To Field, Type Title in Subject Line and Type out body of email. 4. When finished with email and all relevant documents are attached, click SEND. 5. Attach To Tab will open in Browser 6. Click Magnifying Glass to the right of the Code Field to Locate Client. Click Finish Once Account is found. 7. Under Attach To – Identify and select the appropriate dropdown (Policy or Activity) for where the Email and/or documents should be attached to.   A screenshot of a computer  Description automatically generated   1. Once all required fields are completed, Click Finish and email will be routed into Applied.   Attaching Existing Email   1. Right Click on existing email in Outlook and select Attach to Epic 2. Attach to Tab will open in Browser 3. Click Magnifying Glass to the right of the Code Field to Locate Client. Click Finish Once Account is found. 4. Uncheck the “Delete original after attaching” box 5. NOTE: If this box does not get un-checked, your email will be deleted from your outlook.   A screenshot of a computer  Description automatically generated   1. Under Attach To – Identify and select the appropriate dropdown (Policy or Activity) for where the Email and/or documents should be attached to. 2. Once all required fields are completed, Click Finish and email will be routed into Applied. |

#### **AI Email Summarization**

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| **A screenshot of a computer  Description automatically generated**Let Epic’s AI Email Summarization tool add activity notes while simultaneously attaching your email.   1. Drag your document to & release on an activity *(either open to full details or in list view)*    1. Select **Summarize** to summarize a thread    2. OR check the box to include **Latest Message Only** and then select **Summarize** 2. The summarized notes will auto-populate and should be reviewed to confirm the results are valid and as expected *(you may add, delete or amend the notes as needed)* 3. Complete your attachment **Description,** select appropriate folder *(if not defaulted)* 4. **Finish**   **A screenshot of a computer  Description automatically generated** |

#### **Add New Documents from Templates**

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| To select a form letter:   1. Click the Attachments area in the Client account 2. Click the **ADD** button (+) 3. Select Document – click Continue   A screenshot of a computer  Description automatically generated   1. Select a **Template Folder** (i.e., Commercial) 2. Select the form letter from the dropdown list   A screenshot of a computer screen  Description automatically generated   1. Under the Contact tab, check the recipient of the letter 2. Click the Policy/Claim tab and select a policy or claim to reference in the letter      1. Click **Continue** 2. Change attachment description if needed 3. Click **FINISH** 4. Epic data will merge with Microsoft Word and letter will open 5. Update letter as needed. When finished, click the X at the top right to close the Word document 6. Click **YES** to save document as an attachment 7. The Attachment will be saved in WORD format; however, if sending the letter via email or to eSignature, be sure to Convert to PDF first, as follows:    1. Right Click on the WORD attachment    2. Select “Convert to PDF”    3. Click **FINISH** 8. From the attachments area, find the PDF version of the form letter, right click and either “Send to eSignature” for DocuSign, or “Send Via Email” to send from Outlook. 9. If “Send Via Email” an attachment screen will pop up. The description can be changed for the email attachment if needed. |

#### **Generate a Form Fillable Acord Application**

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| 1. Navigate to the Home Base 2. Select **Access > eForms** from the blue options bar    1. Highlight the desired form    2. Continue 3. The form fillable application will download to your computer   A screenshot of a computer  Description automatically generated |

## **Attachment Actions**

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| Click **ACTIONS** | * **Convert to PDF** – *Converts any document to PDF format in two clicks; can also combine multiple documents into one PDF document.* * **Distribute Attachments** – *Uses Distribution Manager to email documents to client contacts.* * **Edit Attachment Detail** – *Edit description, association, access levels, and folder.* * **Move Attachment** – *Move attachment to another account, folder, etc.* * Policy Checking (Do Not Use) * **Reactivate Attachment** – *Used to remove an attachment from the Inactive area.* * **Send via CSIO eDelivery –** NOT APPLICABLE * **Send to eSignature** – *Launches DocuSign* * **Send Via Email** – *Emails attachment through Outlook* |

**\*\*PLEASE FOLLOW THE ATTACHMENT NAMING CONVENTION PROTOCOL** [**JOB AID**](#_JA.6_Attachment_Naming)**.**

## **Find and View Attachments/Documents**

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| * **Important Policy Documents:** In the attachments list view, click the link “Show Only Important Policy Documents” to view all documents being previously marked as “Important”   To revert to all documents, click “Show All Documents.” This link serves as a filtering tool.     * **Filters:** Choose a filter: Ex. Attached within last 6 months.     Filtering by multiple Types of Business is also an option and can be set as the filter default     * **Mark as an Important Policy Document** * Attaching a document to a POLICY will automatically check the box * Use this feature to quickly find important documents such as policy dec pages, audits, endorsements, or other important documents.   ***A screenshot of a computer  Description automatically generated*** ***NOTE: the Access button can also be used to filter attachments. Example: Highlight policy, Access/Attachments then only the attachments associated with the highlighted policy will be seen***  Remove description and update using Platform [Naming Convention](#_JA.7_Attachment_Naming)  Select the appropriate access level for security  Check the Client Accessible box to make an attachment available in the client portal (CSR24) |

## **Folder View**

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| * Use folders to organize client documents (Optional) * Folder structure is pre-determined by Acrisure. * To see documents in folders, click Attachments View and select Folder View from the drop-down list. * Select the folder (i.e., Correspondence, Invoices, Policies, etc.) * Click the expander in the left panel to see sub-folders. |
|  |

## **Access Filter**

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| The Access button will filter items for a specific policy, activity, or transaction, within the **Client’s Account**  **Example:**   1. From the policy screen, select a **policy.** 2. Click the **Access** button. 3. Select an option:    * **Activities** = displays all the activities associated with the selected policy    * **Attachments** = displays all the attachments associated with the selected policy    * **Claims** = displays all the claims associated with the selected policy    * **Opportunities** = displays all the sales opportunities associated with the selected policy    * **Services** = displays all the services associated with the selected policy    * **Proofs** = displays all the Proofs associated with the selected policy    * **Transactions** = displays all the transactions associated with the selected policy    * **Auditing** = displays all the documents a client has access to via the [CSR24](#_JA.8_–_Making) Portal    * **Notifications** = displays notifications related to the selected policy |

# **Policy Basics**

**Determining your Issuing Company (ICO) and Premium Payable Entity (PPE)**

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| * **ICO:** The Issuing Company is the writing company that is displayed on the policy DEC page. * **PPE:** The Premium Payable Entity should be the carrier or broker that is paying direct bill commission or invoicing for premium. * **Example:**   + ICO = Travelers Property Casualty Company of America   + PPE = THE TRAVELERS COMPANIES INC   A close-up of a document  Description automatically generated  A screenshot of a computer  Description automatically generated |

**Select the Correct ICO and PPE**

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| **When setting up a policy, it is critical to select the correct writing/issuing company.** A screenshot of a computer  Description automatically generated   * Use the dropdown to select the correct Issuing company * Doing so will default the correct Premium payable entity * Use the dropdown to select the correct Payable contract   **If the correct payable contract is not selected, the wrong location could be paid resulting in delay of payment being applied and potential NOC.** |

**When your PPE is a Broker**

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| A screenshot of a computer  Description automatically generated   * Use the dropdown to select the correct Issuing company * Change the Premium payable from CA to BR and select the appropriate Broker * Use the dropdown to select the correct Payable Contract by clicking the dropdown arrow   **If the correct payable contract is not selected, the wrong location could be paid resulting in delay of payment being applied and potential NOC.** |

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| **Data Standards**  **ICO**   * The Epic ICO field should match the policy DEC page. * If the final company has not yet been determined, you may use the QUOTE1 ICO as a placeholder, but you must update when you bind coverage along with the policy #. * If the issuing company you are looking for is not available in Epic, you can submit a request to Regional Enterprise Applications (REA).   **PPE**   * The PPE must match the carrier/broker invoice or commission statement * The PPE field is critical because if the wrong PPE is selected it could lead to the wrong carrier getting paid resulting in cancellation, delayed commission posting could impact producers, and carrier/reporting analytics could be incorrect * The accounting team may enter a $PUR activity for you to update the PPE if it is not entered properly which will indicate to you a policy update is needed |

## **Service Summary Rows and Stages**

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| Service Summary Rows **(SSR)** provide a chronological order of services provided to the account. Each service/action taken to a policy will be reflected in the service summary row in the order of most recent.  When viewing a policy in Epic it is essential to view the most recent Service Summary Row.  From the policy view screen in a client account click to highlight the policy. Once doing so the most recent Service Summary Row will highlight. To view a different service summary row, click to highlight.  **For example**: Service Summary #2 *will* display the policy details for the endorsement effective on the date noted on the Service Summary row. While Service Summary Row #1 *will not* reflect the added vehicle since Service Summary row #1 is the details of the policy when the policy term began.  A screenshot of a computer  Description automatically generated  ***NOTE: When viewing a multi-line package, click to highlight one of the lines under the policy header to view the Service Summary Row. The screenshot below indicates if CPK1 is selected, there are no SSR’s displayed.***  A screenshot of a computer  Description automatically generated  ***Single click on a line of business then the most recent Service Summary Row will default.***  ***See below.***  A screenshot of a computer  Description automatically generated  Having multiple Service Summary Rows to view, allows us to be able to see the policy details at any given date during the term. We can use these details to compare the changes made between one Service Summary Row and another. To compare Service Summary rows, go to Blue Options bar and click **ON Demand>Service Summary Comparison**  The list below explains what the various stages represent. ***It is imperative to be sure the correct status of the policy is representative of the current stage of the policy details.***   * **In Process** – Policy details are not complete, and the application is open for edits * **Submitted** – It has been sent to the carrier for action and the application or endorsement is now locked down * **Issued** - Policy or endorsement has been issued by the carrier or confirmation of coverage received from carrier * **Not Issued** – Use only if policy or endorsement has not been issued by the carrier and it was previously in submitted stage * **Cancelled** – Cancellation has been confirmed by the carrier * **Migrated** – One time use for conversion and simulates the stage of submitted |

## **Source of Business – Cross Sell – Examples**

The original ***Account source*** was EB Only based on typical producer prospecting and should show as such in Account Detail.

A screenshot of a computer

Description automatically generated

The original EB ***Policy Detail*** Source should match the Account Detail Source.

A screenshot of a computer

Description automatically generated

Years later, the Servicer 1 sells the insured an additional coverage of Dental. At ***Policy Detail*** Source should be AM/AE Solicited

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A screenshot of a computer

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EB Producer introduces COM Producer for the cross sell.

**Nothing changes on the ACCOUNT** as the account was originally generated by the producer solicitation.

Original COM **Policy Detail** should have Source coded as Cross Sell-Platform for reporting.

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Description automatically generated

## **Copy Policy**

|  |
| --- |
| Use this workflow when a copy of an entire policy needs to be moved within the same account or to another account.   1. Highlight the policy needing to be copied. 2. Click **ACTIONS > Copy Policy** 3. Choose To Another Account or To Current Account 4. Enter Lookup Code of the Other Account (if copying to another account) 5. Fill in structure and policy detail. 6. Click Detail 7. Policy has now been copied. Enter additional detail as needed. |

## **Print Application**

|  |
| --- |
| 1. With the policy selected, click **ACTIONS** **> Review Application** 2. Click the **Distribution** Tab    1. Select Print as the distribution method.    2. Click the Download & Print button.      * 1. Download will be added to your **Downloads Folder** on your computer. This will allow the documents to be printed locally or to be printed from the PDF file.   A screenshot of a computer  Description automatically generated  ***NOTE: Do not use the PRINT button – this function downloads and prints a watermarked “House Copy”*** |

## **ACORD Application Prefills**

|  |
| --- |
| Prefilled ACORD applications can be configured for your convenience (email [support@acrisure.com](mailto:support@acrisure.com))   * Use prefills to enter common information or agency standard limits/coverages. * The prefill can then be added when the policy is created by clicking the dropdown list and selecting the prefill.   A screenshot of a computer  Description automatically generated   * Prefills can also be added while in the application (navigation panel is open to the policy form), then clicking Actions / Select Prefill. Service Summary Stage must be In Process.   A screenshot of a computer screen  Description automatically generated |

## **Multi-Year Policies**

|  |
| --- |
| A screenshot of a computer  Description automatically generated   * For multi-year terms such as a 3-year policy term, the effective and expiration dates should reflect the full. three years. The estimated premium should also reflect the full 3-year premium amount. Commission agreements can be set up as multi-year commission agreements. Please reach out to your REA Regina Kanen per Platform for assistance with the Multi-Term Commission Schedule.   *\*\*Example: Jane Smith has a three-year Crime policy. The full premium is being collected at the policy inception. If the client is being billed for the full three-year premium, the policy would be entered with an effective/expiration date of January 1, 2024, to January 1, 2027.* |

## **Continuous Policies (policies which do not expire)**

|  |
| --- |
| * **Personal & Commercial Policies**:   + If an Agency Bill or Direct Bill policy and expiration date is known, enter as reflected on policy or binding documents.   + If a true continuous policy (i.e., E&O, Tail Coverage, etc.) where expiration date is not known and policy changes are not expected, enter the expiration date as 9999.   + If policy changes are expected, enter policy as an annual term and renew from year to year until coverage ends. * **Individual Life & Health & Employee Benefits Policies:**   + If expiration date is known, enter as reflected on policy or binding documents/service contract.   + If expiration date is not known, enter expiration date with a 9999 year. * **Client Contracts/Fee Policy Types:**   + If a service contract/fee policy type and expiration date are known, enter the expiration date as reflected on the service contract.   + If a service contract/fee policy type and the expiration date are unknown, enter the expiration date as a one-year term and renew annually until the contract is canceled.   + This process will continue until the carrier no longer collects annual premiums or cancels them. |

# Regional Epic Configuration

## **Epic Icons**

|  |  |  |  |
| --- | --- | --- | --- |
|  | Add New |  | Change column width |
|  | Edit |  | To define a search |
|  | Print list view |  | Executes search. These are cumulative. To begin a new search, click “Clear Filter” |
|  | Sortable column – ascending/descending |  | The logout button will close all open windows. If any screen requires validation (the process isn’t complete), the screen with display prior to closing |
|  | Change the order of items | **RIGHT CLICK** | Right clicking on a selected policy, activity or contact will often generate the same menu as ACTIONS. |
|  | Collapses and opens sections of screen or moves full list from one screen to another |  | Click on the Paperclip to attach documents saved in Epic (Email) |
|  | Required Field – must complete |  | Click on the File to attach files saved on a local or network drive (Email) |
|  | Desired Field – agency would like field completed |  | Contacts in EPIC (from Email) |
|  | Customize columns displayed in the list view | A black and white picture with a person in a square  Description automatically generated | Contacts in Outlook (from Email) |

## **Acrisure Partners West Coast Insurance Services, LLC Platform Epic Structure**

|  |  |  |
| --- | --- | --- |
| **AGENCIES** | | |
| **1WC** | Acrisure Partners West Coast Insurance Services, LLC | |
| **WCD** | West Coast Direct Insurance Services, LLC | |
| **IPI** | International Pro Insurance Solutions | |
| **BRANCHES** | | |
| **CA1** | California - North | |
| **WCD** | West Coast Direct Insurance Services, LLC | |
| **CAC** | Cannabis Connect | |
| **HI1** | Monarch Insurance Services | |
| **IPI** | International Pro Insurance Solutions | |
| **DEPARTMENTS** | | |
| **CHS** | Compliance & HR Services | Consulting HR |
| **BND** | Bonds | All Policy Types = BO |
| **CLS** | Commercial – Small | <$2,500 Revenue |
| **CLM** | Commercial – Middle | $2,500 to $10k Revenue |
| **CLL** | Commercial – Large | $10k Revenue + |
| **REF** | Non-Insurance Referrals | Non-Insurance Products - PEO, ACS, Title Referrals |
| **SRV** | Services | Consulting P&C |
| **PROFIT CENTERS** | | |
| **BND** | Bonds |  |
| **CAC** | Cannabis Connect |  |
| **CHS** | Compliance & HR Services | Consulting HR |
| **COM** | COM - General | Commercial Business – Use when no other profit center applies |
| **CPG** | COM - Construction Practice | Commercial Only |
| **NON** | Non-Profits Practice Group |  |
| **REF** | Non-Insurance Referrals | Non-insurance-related revenue (ACS referrals, PEO brokering, Payroll Services referrals, etc.) |
| **REG** | COM - Real Estate |  |
| **RMG** | Risk Management Services | Consulting P&C |
| **TRA** | COM - Transportation |  |
| **XSC** | Acrisure Service Center | All Business moved to Service Center |
| **WLD** | Wildfire Program |  |

## **Client Account**

### **Account Sources – REQUIRED FIELD**

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| |  | | --- | | 0. Cross Sell-Platform | | 1. AM/AE Solicited | | 1. Producer Solicited | | 2. Referral - Acrisure Cyber Services | | 2. Referral - Acrisure Global Network | | 2. Referral - Acrisure Title Partner | | 2. Referral - Association | | 2. Referral - Broker - Acrisure | | 2. Referral - Broker - Non-Acrisure | | 2. Referral - Carrier | | 2. Referral - Client | | 2. Referral - Employee | | 2. Referral - Evolution Advisors | | 2. Referral - FBC Mortgage | | 2. Referral - Family Office | | 2. Referral - Financial Partner/WM | | 2. Referral - Franchisor | | 2. Referral - GA | | 2. Referral - Loan Officer | | 2. Referral - Mariner Wealth | | 2. Referral - Other | | 2. Referral - Payroll Firm | | 2. Referral - Realtor | | 2. Referral - TPA | | 3. Marketing - Acrisure.com | | 3. Marketing - Internet Search | | 3. Marketing - Other | | 3. Marketing - Social Media | | 3. Marketing - Telemarketing | | 3. Marketing - Tradeshow | | 4. Other/Unknown | | 5. Win Back | | 6. Call In/Walk In | | 7. Campaign - CannabisConnectInsurance.com | | 7. Campaign - CFC | | 7. Campaign - Encompass CC | | 7. Campaign - State Farm CA | | Lead Generation - Renee Inman | | Lead Generation - SDR | | Z. Update Needed | | **Account Source** is a **Required Field** and should accurately reflect how this new client was generated.    **Be sure to select the appropriate one for tracking and reporting purposes.**  If the policy source is unknown,  select “**Z.** **Update Needed**” to update at the earliest opportunity.  This only needs to be updated on new accounts since your conversion to the regional Epic. Historical clients are not required to be updated.  **Why does it Matter?**   * Aligning our Epic Accounts with Auris third-party data gives us insights to our clients * Understanding how we generate new clients * Analyzing our client base to understand their needs better * Identifying opportunities to cross-sell Employee Benefits with our Commercial Clients. |

### **Servicing Roles**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **External Service Team** | |  | | --- | | Acrisure Service Center | | Carrier Service Center | | GA – Benefitmail | | GA – Emerson Reid | | GA – GBL\* | | GA – Marin Insurance Services \*  GA – PGM\*  GA – Suvaun\* |   **When an account and/or policy is managed by an external service team (the Acrisure Service Center, a Carrier Service Center, or a General Agent on the EB side), select the appropriate one from the drop-down list.**  **Note:**  **An Acrisure-owned GA will be indicated by an asterisk.** |
| Marketing |
| P&C Producer 1 |
| P&C Producer 2 |
| P&C Servicer 1 |
| P&C Servicer 2 |
| P&C Claims |
| P&C Account Executive |
| Surety Producer |
| Surety Servicer |
| EB Producer 1 |
| EB Producer 2 |
| EB Account Manager |
| EB Support |
| EB Account Executive |
| Non-Insurance Producer |
| Non-Insurance Servicer |
| CRM Relationship Manager |
| Contract Producer |
| Contract Servicer |

## **Policies**

### ***Policy Sources – REQUIRED FIELD***

|  |  |
| --- | --- |
| **Description** | **Policy Source** is a **Required Field** and should accurately reflect how the new client was generated.  **Be sure to select the appropriate one for tracking and reporting purposes.**  If the policy source is unknown, select “**Z.** **Update Needed**” to  update at earliest opportunity.  **Why does it Matter?**   * Aligning our Epic Accounts with Auris third-party data gives us insights to our clients * Understanding how we generate new clients * Analyzing our client base to better understand their needs * Identifying opportunities to cross-sell Employee Benefits with our Commercial Clients |
| 0. Cross Sell-Platform |
| 1. AM/AE Solicited |
| 1. Producer Solicited |
| 2. Referral - Acrisure Cyber Services |
| 2. Referral - Acrisure Global Network |
| 2. Referral - Acrisure Title Partner |
| 2. Referral - Association |
| 2. Referral - Broker - Acrisure |
| 2. Referral - Broker - Non-Acrisure |
| 2. Referral - Carrier |
| 2. Referral - Client |
| 2. Referral - Employee |
| 2. Referral - Evolution Advisors |
| 2. Referral - Family Office |
| 2. Referral - FBC Mortgage |
| 2. Referral - Financial Partner/WM |
| 2. Referral - GA |
| 2. Referral - Loan Officer |
| 2. Referral - Mariner Wealth |
| 2. Referral - Other |
| 2. Referral - Payroll Firm |
| 2. Referral - Realtor |
| 2. Referral - TPA |
| 3. Marketing - Acrisure.com |
| 3. Marketing - Internet Search |
| 3. Marketing - Other |
| 3. Marketing - Social Media |  |
| 3. Marketing - Telemarketing |  |
| 3. Marketing - Tradeshow |  |
| 4. Other/Unknown |  |
| 5. Win Back |  |
| 6. Call In/Walk In |  |
| 7. Campaign - CannabisConnectInsurance.com |  |
| 7. Campaign - CFC |  |
| 7. Campaign - Encompass CC |  |
| 7. Campaign - State Farm CA |  |
| Lead Generation - Renee Inman |  |
| Lead Generation - SDR |  |
| Z. Update Needed |  |

### ***Policy Types***

|  |  |  |
| --- | --- | --- |
| **Code** | **Description** | **Application Detail** |
| **ALIA** | Agriculture Liability | Agri-Business Liability |
| **APK1** | Agriculture Package-AG | < None > |
| **APK2** | Agriculture Package-CL | < None > |
| **APP** | Agriculture Personal Property | Agri-Business Schedule and Unscheduled Personal Property |
| **APRO** | Agriculture Property | Agri-Business Property Section |
| **BCM1** | BOND Commercial (NR) | Surety Report Detail |
| **BCM2** | BOND Commercial (Reccuring) | Surety Report Detail |
| **BCON** | BOND Contract (NR) | Surety Report Detail |
| **BCOU** | BOND Court | Surety Report Detail |
| **BCWA** | BOND Contract Warranty (NR) | Surety Report Detail |
| **BFI1** | BOND Fidelity / ERISA - Surety | Surety Report Detail |
| **BFI2** | BOND Fidelity / ERISA - CL | < None > |
| **BLIC** | BOND License & Permit | Custom Form |
| **BMAI** | BOND Maintenance (NR) | Surety Report Detail |
| **BMSC** | BOND Miscellaneous | Surety Report Detail |
| **BNOT** | BOND Notary | Surety Report Detail |
| **BPER** | BOND Performance Payment (NR) | Surety Report Detail |
| **BPOF** | BOND Public Official | Surety Report Detail |
| **BROF** | BOND Roofing (NR) | Surety Report Detail |
| **BSUB** | BOND Subdivision | Surety Report Detail |
| **CACH** | Commercial Accident & Healt4h | < None > |
| **CADD** | Commercial AD&D | CF AD&D/Travel Accident |
| **C-AF** | Captive Assessment Fee | < None > |
| **CANI** | Animal Mortality | < None > |
| **CARA** | COM Roadside Assistance | Business Auto Detail |
| **CAU1** | Business Auto | Business Auto Detail |
| **CAU2** | Business Auto - Excess | Business Auto Detail |
| **CAU3** | Commercial Recreational Vehicle | Business Auto Detail |
| **CAV0** | Commercial Aircraft | CF Aircraft |
| **CAV1** | Aviation Drones/UAV | < None > |
| **CAV2** | Aviation General Liability | CF Aircraft |
| **CBAI** | Bailee | Property Detail |
| **CBM** | Boiler & Machinery | Boiler & Machinery Detail |
| **CBOP** | Business Owners Policy | Business Owners Detail |
| **CBR** | Builders Risk – Project Specific (NR) | Installation/Builders Risk Detail |
| **CBR**2 | Builders Risk – Reporting Form | Installation/Builders Risk Detail |
| **CCL1** | Cyber Liability | Cyber Liability |
| **CCL3** | Cyber Liability – Excess | Umbrella Detail |
| **CCOW** | Control of Well | < None > |
| **CCRM** | Crime | Crime Detail |
| **CCRP** | Crop & Hail | CF Crop |
| **CDIC** | Difference In Conditions | Property Detail |
| **CDO1** | Directors & Officers | CF Directions & Officers |
| **CDO2** | Directors & Officers - Excess | Umbrella |
| **CE01** | Errors & Omissions | CF Errors & Omissions |
| **CE02** | Errors & Omissions - Accountants | CF Errors & Omissions |
| **CE03** | Errors & Omissions - Architects & Engineers | CF Errors & Omissions |
| **CE04** | Errors & Omissions - Bankers | CF Errors & Omissions |
| **CE05** | Errors & Omissions - Contractors | CF Errors & Omissions |
| **CE06** | Errors & Omissions - Lawyers | CF Errors & Omissions |
| **CE07** | Errors & Omissions - Med Mal | CF Errors & Omissions |
| **CE08** | Errors & Omissions - Miscellaneous | CF Errors & Omissions |
| **CE09** | Errors & Omissions - Public Officials | CF Errors & Omissions |
| **CE10** | Errors & Omissions - Pension Trustee | CF Errors & Omissions |
| **CE11** | Errors & Omissions - Excess | CF Errors & Omissions |
| **CE12** | Errors & Omissions – Aviation | CF Errors & Omissions |
| **CE13** | Errors & Omissions – Clinical Trials | CF Errors & Omissions |
| **CE14** | Errors & Omissions – Education Legal Liability | CF Errors & Omissions |
| **CE15** | Errors & Omissions – Transportation Brokers | CF Errors & Omissions |
| **CE16** | Errors & Omissions – Property Managers | CF Errors & Omissions |
| **CEBL** | Employee Benefits Liability | < None > |
| **CEDP** | Electronic Data Processing | Electronic Data Processing Detail |
| **CEF1** | Equipment Floater | Equipment Floater Detail |
| **CEF2** | Commercial Fine Arts | Equipment Floater Detail |
| **CEF3** | Jewelers Block | Equipment Floater Detail |
| **CEML** | Employed Lawyers | General Liability Detail - Simplified |
| **CEP1** | Employment Practices Liability | CF Employment Practices Liability |
| **CEP3** | Employment Practices Liability – Excess | Umbrella Detail |
| **CEQ** | Commercial Earthquake | Property Detail |
| **CEQU** | Equine | CF Animal Mortality |
| **CERP** | Extended Reporting Period | General Liability Detail - Simplified |
| **CFGL** | Foreign General Liability | CF Foreign Liability |
| **CFL** | Fiduciary Liability | CF Fiduciary Liability |
| **CFLO** | Fiduciary Liability Excess | CF Fiduciary Liability |
| **CFL1** | Commercial Flood (NFIP) | Flood Insurance Preferred Risk Policy App |
| **CFL2** | Commercial Flood (Private) | Flood Insurance Preferred Risk Policy App |
| **CFL3** | Commercial Flood - Excess | Flood Insurance Preferred Risk Policy App |
| **CGD** | Garage & Dealers | Garage and Dealers Detail |
| **CGL1** | General Liability | General Liability Detail - Simplified |
| **CGL2** | General Liability - Excess | Umbrella Detail |
| **CGL3** | GL – Project Specific (NR) | General Liability Detail - Simplified |
| **CGL4** | GL - OCIP / Wrap (NR) | General Liability Detail - Simplified |
| **CGL5** | GL – OCIP - Owners Contractor Protective (NR) | General Liability Detail - Simplified |
| **CGL6** | GL – CCIP – Contractors Controlled Insurance Program (NR) |  |
| **CGS** | Glass & Sign | Glass and Sign Detail |
| **CGSD** | Group State Mandated Disability (CL) | < None > |
| **CHUL** | Hull & Machinery | < None > |
| **CID** | Commercial Identity Theft | < None > |
| **CKR** | Kidnap & Ransom | CF Kidnap & Ransom |
| **CLD** | Legal Defense | < None > |
| **CLL** | Liquor Liability | CF Liquor Liability |
| **CMOL** | Marina Operators Liability | CF Marina Operators Liability |
| **CMTC** | Motor Truck Cargo | Motor Truck Cargo |
| **CNL** | Nuclear Liability | General Liability Detail - Simplified |
| **COA** | Occupational Accident | CF Occupational Accident |
| **COI1** | Owners Interest | General Liability Detail - Simplified |
| **COI2** | Owners Interest - Excess | General Liability Detail - Simplified |
| **COMC** | Ocean Cargo | CF Ocean Marine Cargo |
| **CP1** | Property | Property Detail |
| **CP2** | Property - Excess | Property Detail |
| **CPI** | Protection & Indemnity | General Liability Detail - Simplified |
| **CPK1** | Commercial Package | < None > |
| **CPK2** | Executive Package | < None > |
| **CPK3** | Foreign Package | < None > |
| **CPK4** | Commercial Farm Package | < None > |
| **CPK5** | Public Entity Package | < None > |
| **CPK6** | Energy Package | < None > |
| **CPK7** | Dealer Package | < None > |
| **CPK8** | Marine Package | < None > |
| **CPLI** | Products Liability | General Liability Detail - Simplified |
| **CPLL** | Public Law Liability | General Liability Detail - Simplified |
| **CPO1** | Pollution | CF Pollution |
| **CPO2** | Underground Storage Tank | CF Pollution |
| **CPO3** | Above Ground Storage Tank | CF Pollution |
| **CP04** | Pollution – Contractors | CF Pollution |
| **CPRE** | Product Recall | General Liability Detail - Simplified |
| **CRP** | Railroad Protective | General Liability Detail - Simplified |
| **CRW** | Reps & Warranties | < None > |
| **CSA** | Student Accident | < None > |
| **CSAM** | Sexual Abuse and Molestation Liability | General Liability Detail - Simplified |
| **CSD** | Subcontractor Default | < None > |
| **CSE1** | Special Event (NR) | General Liability Detail - Simplified |
| **CSE2** | Hole-In-One (NR) | General Liability Detail - Simplified |
| **CST** | Stock Throughput | < None > |
| **CTA** | Travel Accident (NR) | CF Travel Accident |
| **CTC** | Trade Credit | CF TRG 01 Trade Credit |
| **CTD** | Tenant Discrimination | < None > |
| **CTER** | Terrorism | Property Detail |
| **CTR1** | Truckers | Truckers/Motor Carriers Detail |
| **CTR3** | Truckers Auto Liability | Truckers/Motor Carriers Detail |
| **CTR4** | Truckers Contingent Auto Liability | Truckers/Motor Carriers Detail |
| **CTR5** | Truckers Contingent Cargo Liability | Motor Truck Cargo |
| **CTR6** | Truckers Physical Damage | Truckers/Motor Carriers Detail |
| **CTR7** | Truckers Package | < None > |
| **CTR8** | Truckers Broker Liability | Truckers/Motor Carriers Detail |
| **CTR9** | Truckers Passenger Accident | Truckers/Motor Carriers Detail |
| **CTRA** | Transportation | Transportation Detail |
| **CTRB** | Bobtail | Truckers/Motor Carriers Detail |
| **CUMB** | Commercial Umbrella | Umbrella Detail |
| **CVO2** | Volunteer Accident | General Liability Detail - Simplified |
| **CVOL** | Volunteers Participants Liability | General Liability Detail - Simplified |
| **CVP** | Valuable Papers / Accounts Receivables | Accounts Receivable/Valuable Papers Detail |
| **CWAT** | Commercial Watercraft | < None > |
| **CWC1** | Workers Compensation | Workers Compensation |
| **CWC2** | Workers Comp Assigned Risk | Workers Compensation |
| **CWC3** | Workers Compensation - Excess | Workers Compensation |
| **CWE1** | Employers Liability – Monopolistic States | Workers Compensation |
| **CWE2** | Employers Liability – Marine | Workers Compensation |
| **CWE3** | Employers Liability – Maritime | Workers Compensation |
| **CWI1** | Commercial Wind / Hail | Property Detail |
| **CWI2** | Commercial Wind - Excess | Property Detail |
| **CWI3** | Commercial Wind Deductible Buy Back | Property Detail |
| **CWI4** | Commercial Wind – Assigned Risk | Property Detail |
| **CWLL** | Warehouse Legal Liability | < None > |
| **CWV** | Workplace Violence | < None > |
| **CXLI** | Excess Liability | Umbrella Detail |
| **R401** | 401K Referral | < None > |
| **RACS** | Acrisure Cyber Services | < None > |
| **RODP** | On-Demand Pay Referral | < None > |
| **RPA2** | Payroll Referral | < None > |
| **RPEO** | PEO | < None > |
| **RPEW** | PEO Workers Compensation | < None > |
| **RSLO** | SMB Loan Referral | < None > |
| **RSUB** | Subscription/Membership | < None > |
| **RTIT** | Acrisure Title Referral | < None > |

### ***Line Status***

|  |  |  |
| --- | --- | --- |
| **CODE** | **DESCRIPTION** | **WHEN USED** |
| **CNW** | Canceled (New) | Cancelled policy when original policy status was NEW |
| **CRN** | Cancelled (Renewal) | Cancelled policy when original policy status was REN |
| **CRW** | Cancelled – Rewritten (Flat or Mid-Term Rewrite) | To be used on prior carrier canceled term |
| **NBR** | New – BOR | New Policy acquired via BOR |
| **NEW** | New | New policy |
| **NX1** | New – Cross Sell – Under 10k | New policy cross-sold within the Platform |
| **NX2** | New – Cross Sell – Over 10k | New policy cross-sold within the Platform |
| **REN** | Renewal | Renewed policy with same carrier |
| **REW** | Renewal – Rewrite (First renewal w/new carrier) | To be used on policy placed with new carrier |
| **RX1** | Renewal – Cross Sell – Under 10k | Renewal of a cross-sold policy |
| **RX2** | Renewal – Cross Sell – Over 10k | Renewal of a cross-sold policy |
| **X-N** | Not Renewed (New) | Policy went to term but did not renew – original status = NEW |
| **X-R** | Not Renewed (Renewal) | Policy went to term but did not renew – original status = REN |
| **ZER** | Created In Error | Use when deprecating policy for conversion cleanup, etc. |
| **ZIN** | Info Only | Use for Info Only policies which are not active with any carrier |

## **Adding an Agency Defined Category to a Policy Line**

### ***Agency Defined Categories***

|  |  |  |
| --- | --- | --- |
| **Category** | **Status** | **Option** |
| At Risk Renewal | Active | CAR - Client at Risk |
| At Risk Renewal | Active | RAR - Retained at Risk |
| Loss Events | Active | 2025 CA Wildfires |
| Type of Policy | Active | Manual Renewal Clean-Up |
| Type of Policy | Active | Monoline to Package Conversion Cleanup |
| Type of Policy | Active | Multi-Year Term |
| Type of Policy | Active | No Premium Policy |
| Type of Policy | Active | Non-Standard Commission Agreement |
| Type of Policy | Active | One Time Policy |

### ***Agency Information***

|  |
| --- |
| * **Agency Defined Categories** – predetermined by the agency; used to tag an account for a specific reporting purpose (i.e. Type of Policy)   A screenshot of a computer  Description automatically generated |

### ***How to Add ADC to Policy Level***

|  |
| --- |
| * Locate Account and click on Policies in the Left Navigation Pane * Double-click on Policy and click Line in the Left Navigation Pane   A screenshot of a computer  Description automatically generated   * Go to Categories/History Tab * Click on Add (+)   A screenshot of a computer  Description automatically generated   * Choose by Type of Policy   A screenshot of a computer  Description automatically generated   * Click Finish |

### ***Policy Types ADC’s Required For***

|  |
| --- |
| * **One-Time Policy** - this is to be used on policies we know will not have a renewal, i.e. Special Event. The ADC is to be added when building the policy unless the policy type has a NR behind it. * Add Policy * Locate Account and click on Policies in the Left Navigation Pane * Double-click on Policy and click Line in the Left Navigation Pane   A screenshot of a computer  Description automatically generated   * Go to Servicing/Billing>Line>Categories/History to add ADC - **One Time Policy** and click Finish.   A screenshot of a computer  Description automatically generated   * Agency Defined Categories is now showing One Time Policy   A white rectangular object with a black stripe  Description automatically generated   * **Monoline to Package** – this should be used when cleaning up monoline policies being moved into a package at renewal. i.e.- GL & Property added to a Package line. * Renew one of the lines of business and change the Type to CPK1   A screenshot of a computer  Description automatically generated   * Click Detail – Servicing/Billing>Line and Add other lines of business.   A screenshot of a computer  Description automatically generated   * Enter info for lined added including Commission and click Finish   A screenshot of a computer screen  Description automatically generated   * Go to Categories/History Tab and add:   A screenshot of a computer  Description automatically generated   * Check mark type of Policy – Monoline to package conversion cleanup then click Finish.   A screenshot of a computer  Description automatically generated   * **Manual Renewal Clean Up** – This is to be used when a download changes the Action in the Service Summary to New and therefore disrupts the continuity of the policy. * Change Policy view from, Policies – Current/Renewed to Expired/History A screenshot of a computer    Description automatically generated * Locate the prior term, double-click to open, and from the Left Navigation pane – Servicing/Billing>Line, choose Categories/History and click the add (+) button   A screenshot of a computer  Description automatically generated   * Locate Type of Policy>Manual Renewal Clean Up and select, then click Finish   A screenshot of a computer  Description automatically generated |

## **Activities**

### **Activity Access Levels**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| |  | | --- | | **Description** | | Accounting | | HIPAA | | HR Consulting | |  | |

### **Activity Workgroups**

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
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| |  |  | | --- | --- | | **Code** | **Description** | | @APPAY | Applied Pay Default Work Group | | @EXT | External Default Group | | @LEADS | Leads Inbox Default Work Group | | ACCT | Accounting | | APAY | Accounting - Payables | | ARVW | Accounting Review | | BAISB | Bozzuto Staff Boom | | CIDT | ACRISURE Centralized Interface Download Team | | CLAC | CL Account Coordinators | | CLLEAN | CL Lean Team | | CLNOC | CL Notice of Cancellation | | CLNWBC | CL New Business | | CORAAM | CORE Associate Accouny Managers | | DBSC | Direct Bill Service Center | | GLCL | General Claims Group | | INVO | Invoicing | | MVR | MVR Work Group | | RCIPT | RCI Patra | | RSPLRS | Resource Pro Loss Runs | | SA | Systems Analyst | | VAGORA | Vantage Agora | | VIBCRT | VIB Certs | | WSTCRT | West Certificate Team | |  |  | |

### **System-Generated Activity Codes**

|  |  |  |
| --- | --- | --- |
| **Code** | **Description** | **Event** |
| **ACLM** | # Added claim for DOL &DateLoss& | Add Claim |
| **ADD1** | # Add Insured &AcctName& | Add Account |
| **ADD2** | # Add Prospect &AcctName& | Add Account |
| **ADDC** | # Address Applied to Other Items | Address Applied to Other Items |
| **ADSC** | # Add Service | Add Service |
| **AMMK** | # Added master marketing submission for &AcctName& | New Marketing Submission |
| **AOP** | # Add Opportunity | Add Opportunity |
| **APOL** | # Added &PolType& policy effective &PolEffDate& | Add Policy |
| **AUID** | # Issued auto ID card | Issue Auto ID Card |
| **BIND** | # Issued binder &PolDesc& &PolEffDate &Policy#& | Issue Binder |
| **BND1** | # Bind Policy via Master Marketing | Move Marketed Lines to Current Policies |
| **BORP** | # BOR P&C - Agent Received Date: | Add Policy |
| **CCTI** | # Change Client Type To Insured | Change Client Type |
| **CCTP** | # Change Client Type to Prospect | Change Client Type |
| **CEED** | # Change Effective/Expiration Dates | Change Effective/Expiration Dates |
| **CERT** | # Issued Certificate &AcctName& | Issue Certificate |
| **CHGA** | # Audit &ServSumEffDate& &ServSumDesc& | Endorse/Revise-Existing Lines |
| **CHGE** | # Change &ServSumEffDate& &ServSumDesc& | Endorse/Revise-Existing Lines |
| **CHGI** | # Internal Correction &ServSumEffDate& &ServSumDesc& | Endorse/Revise-Existing Lines |
| **CHGL** | # &ServSumEffDate& &ServSumDesc& | Endorse/Revise-Add Line Midterm |
| **CPOL** | # Canceled - Lost Policy Eff: &ServSumEffDate& &ServSumDesc& | Cancel Policy/Line |
| **CREW** | # Canceled - Rewritten Policy Eff: &ServSumEffDate& &ServSumDesc& | Cancel Policy/Line |
| **CS24** | # Client Portal Account Created &ContactName& | Client Portal Account Created |
| **DSUS** | # Processed downloaded policy suspense item | Process Downloaded Policy Suspense Item |
| **ESIG** | # Send to eSignature | Send to eSignature |
| **EVID** | # Issued Evidence of Insurance &PolDesc& &PolEffDate& | Issue Evidence of Insurance |
| **I-CS** | # Indio Carrier Submission Added | Indio Carrier Submission Added |
| **LOS1** | # Lost Opportunity: &AcctName& | Close Opportunity |
| **MQS** | # Mark Quote Sold - &PolDesc& | Mark Quote Sold |
| **PROP** | # Proposal Generated | Proposal |
| **RCER** | # Renewed COI | Renew Certificate of Insurance |
| **REIN** | # Reinstated policy/line | Reinstate Policy/Line |
| **RESC** | # Renew Service | Renew Service |
| **REVI** | # Renewed EOP | Renew Evidence of Insurance |
| **RPOL** | # Renewal &PolType& &PolEffDate& | Renew Policy |
| **SCAS** | # Submitted to Carrier Submitted to &PPEName& for quote on &PolDesc& | Submit to Carriers |
| **SMR** | # SMS Routed | Texting |
| **SMS** | # SMS Sent | Texting |
| **SUMM** | # Summary Generated | Summary created |
| **WON1** | # Won P&C Opportunity: &AcctName& | Close Opportunity |
| **WON3** | # Won Surety Opportunity: &AcctName& | Close Opportunity |
| **WON4** | # Won RMS Opportunity: &AcctName& | Close Opportunity |
| **WON5** | # Won Flood Consulting Opportunity | Close Opportunity |
| **WON6** | # Won Flood Insurance Opportunity | Close Opportunity |
| **WON7** | # Won Referral Opportunity | Close Opportunity |
| **WON8** | # Won IND Opportunity: &AcctName& | Close Opportunity |
| **WONC** | # Won Cross Sell Opportunity \*AcctName& | Close Opportunity |

### **For Accounting Workflow Manual Activities – See Job Aid for Instructions**

|  |  |
| --- | --- |
| **Code** | **Description** |
| **$CA5** | Enter Receipt for payment – ACH Payments |
| **$CRR** | Client Refund Request |
| **$IF1** | Premium Finance Request |
| **$IN1** | New Invoice Request |
| **$NOC** | NOC – Carrier Name – Policy Number |
| **$PP5** | Direct Bill Sweep Request |

### **Manual Activity Codes (F9)**

|  |  |
| --- | --- |
| **Code** | **Description** |
| **1DS1** | Service Transition to Digital Service |
| **1DS2** | Service Transition back to Regional Service |
| **CARN** | CL - &PolExpDate& &PolType& Automated Pre-Renewal |
| **CAU1** | Audit &PolType& effective &PolEffDate& |
| **CAU2** | Audit - Monthly/Quarterly Reporting Due |
| **CAWC** | CL - &PolExpDate& &PolType& Automated Pre-Renewal Work Comp |
| **CBCH** | CL - Benchmarking |
| **CBIQ** | CL - Billing Inquiry |
| **CBND** | CL - Bind Request to Carrier |
| **CCN1** | CL - Carrier Notice of Cancellation |
| **CCN2** | CL - Notice of Cancellation for Non-Payment |
| **CCOI** | COI Request |
| **C-CR** | Certificate Renewal - Automated |
| **CCRF** | CL - Refer Claim to Claims Team |
| **CCRV** | Claim Review |
| **CCTR** | Contract Review |
| **CDIV** | Dividend |
| **CEOP** | EOP Request |
| **CEXP** | Experience Reporting |
| **CLCR** | Loss Control Recommendation |
| **CLRR** | &PolExpDate& &PolType& Renewal Review |
| **CMVR** | MVR Request |
| **CNCO** | New CL Client Onboarding |
| **CPCK** | CL - Policy Checking |
| **CQUE** | CL - Coverage Inquiry |
| **CREG** | Regulatory Notice |
| **CRMK** | Remarket Request |
| **CRSK** | CL - Account At Risk |
| **CRUN** | Loss Runs |
| **CSLF** | CL – Surplus Lines Tax Documents |
| **CSTW** | CL - Stewardship Report |
| **CUND** | Underwriting |
| **CWA1** | Auto Increase in Reserves |
| **CWAU** | Auto Reduction in Reserves |
| **CWG1** | GL Increase in Reserves |
| **CWGL** | GL Reduction in Reserves |
| **CWO1** | Other Increase in Reserves |
| **CWOT** | Other Reduction in Reserves |
| **CWP1** | Property Increase in Reserves |
| **CWPR** | Property Reduction in Reserves |
| **CWRD** | Claim Win Reversed Declination |
| **CWW1** | Work Comp Increase in Reserves |
| **CWWC** | Work Comp Reduction in Reserves |
| **GACR** | Acrisure Real Estate Services Referral |
| **GACS** | Acrisure Cyber Services Referral |
| **GAPT** | Appointment with &AcctName& |
| **GCAL** | Call from &AcctName& |
| **GCHG** | CSR24 Policy Change Request |
| **GCLM** | CSR24 Claim |
| **GCOI** | CSR24 Cert Issuance |
| **GCRQ** | Certificate Request |
| **GCSA** | Cross Sell Agreement |
| **GNRN** | Policy Not Renewed |
| **GPOR** | CSR24 Client Self Setup on Portal |
| **GSUP** | Support Team Updates |
| **GXFL** | Ex-date follow-up for &AcctName& |
| **QCYB** | Quote - Cyber |
| **QNEW** | Quote - New Business |
| **QREW** | Quote - Rewrite |
| **SARV** | Account Review |
| **SBID** | Bid Bond |
| **SFI** | Financial Information - Bonds |
| **SLTF** | Surplus Documents Filings &PolExpDate& &PolDesc& |
| **SLRR** | Surety – Renewal Review &PolExpDate& &PolDesc& |

### **Downloaded Activity Codes**

|  |  |
| --- | --- |
| **Code** | **Description** |
| **XACR** | eDoc Account Current Reconciliation |
| **XACR** | eDoc Account Current Reconciliation |
| **XADD** | eDoc Audit Dispute |
| **XADE** | eDoc Estimated Audit |
| **XADF** | eDoc Deferred Audit |
| **XADI** | eDoc Audit Initiated |
| **XADJ** | eDoc Adjustor Assignment |
| **XADO** | eDoc Outstanding Premium Audit |
| **XADU** | eDoc Uncollectable Audit |
| **XADW** | eDoc Waived Audit |
| **XAPC** | eDoc Notice of Exposure Change on Policy due to recent Audit (Pre-Endorsement) |
| **XAPV** | eDoc Surety Bond Approval |
| **XARR** | eDoc Anniversary Re-Rating |
| **XBCH** | eDoc Bond Change |
| **XBCS** | eDoc Benefit High Level Claim Summary |
| **XBDC** | eDoc Bond Closed |
| **XBIL** | eDoc Billing Notice |
| **XBND** | eDoc Binder |
| **XBPR** | eDoc Benefit Proposal Information |
| **XBPS** | eDoc Benefit Plan Summary |
| **XBRP** | eDoc Benefit Renewal Proposal |
| **XBRQ** | eDoc Surety Bond Request |
| **XBRS** | eDoc Surety Bid Bond Results |
| **XBST** | eDoc Benefit Status Update |
| **XCLI** | eDoc Claim Information |
| **XCLN** | eDoc Claim Number Assignment |
| **XCLS** | eDoc Claim Status Update |
| **XCOL** | eDoc Bill Collection notice sent |
| **XCOM** | eDoc Direct Bill Commission Detail |
| **XCON** | eDoc Contact |
| **XCRN** | eDoc Conditional Renewal Notification |
| **XCSQ** | eDoc Claims Inquiry |
| **XCUI** | eDoc Communication from underwriter - Immediate response |
| **XCUR** | eDoc Communication from underwriter - No response |
| **XCUS** | eDoc Submission Received |
| **XCUU** | eDoc Communications with underwriter - Response not urgent |
| **XDBR** | eDoc Direct Bill Reconciliation |
| **XDBS** | eDoc Direct Bill Status |
| **XDIV** | eDoc Dividend Transaction |
| **XDSP** | eDoc Download Setup Transaction |
| **XEDT** | eDoc Electronic Document Transfer |
| **XEND** | eDoc Real-Time Endorsement Performed |
| **XEPN** | eDoc Earned Premium Notice |
| **XEPP** | eDoc Earned Premium Paid |
| **XERC** | eDoc Error Correction Notification |
| **XERR** | eDoc Error Messages |
| **XIID** | eDoc Insurance ID Card |
| **XLNT** | eDoc Loss Notice |
| **XLOS** | eDoc First Notice of Loss |
| **XMEM** | eDoc Electronic Memo |
| **XMIS** | eDoc Miscellaneous |
| **XMVR** | eDoc Real-Time MVR Performed |
| **XNBQ** | eDoc New Business Quote |
| **XNBS** | eDoc New Business |
| **XNRA** | eDoc Non Renewal notification to agency |
| **XPAD** | eDoc Notice of Pending Audit (voluntary or on-premises) |
| **XPCH** | eDoc Policy Change |
| **XPCQ** | eDoc Policy Change Quote |
| **XPMK** | eDoc Policy Marketing |
| **XPMT** | eDoc Payment |
| **XPNQ** | eDoc Policy Inquiry |
| **XPOL** | eDoc Policy (unspecified) |
| **XPRM** | eDoc Premium Audit |
| **XPRT** | eDoc Miscellaneous Print |
| **XPYO** | eDoc Overdue Payment List (Cancellation Notice Not Yet Issued) |
| **XPYR** | eDoc Bill Notice has been paid |
| **XRAT** | eDoc Real-Time Rating Performed |
| **XREI** | eDoc Reinstatement |
| **XRES** | eDoc Claim Reserve |
| **XREV** | eDoc Assignment Reversal |
| **XREW** | eDoc Rewrite |
| **XRIX** | eDoc Reissue |
| **XRNR** | eDoc Reversal of Non Renewal |
| **XRRQ** | eDoc Renewal Requote |
| **XRSN** | eDoc Rescind Pending Cancellation |
| **XRTA** | eDoc Retrospective Rating / High-Low / Loss Sensitive Plan Adjustments |
| **XRWL** | eDoc Renewal Image |
| **XRWQ** | eDoc Renewal Quote |
| **XRWR** | eDoc Renewal Request |
| **XRWX** | eDoc Non Renewal |
| **XSBB** | eDoc Submission Bound |
| **XSBC** | eDoc Summary of Benefit Coverages |
| **XSBP** | eDoc Submission Pending Additional Information |
| **XSBR** | eDoc Submission Underwriter Review |
| **XSBU** | eDoc Submission Unbound |
| **XSYN** | eDoc Synchronization (Image) |
| **XSYR** | eDoc Synchronization Request |
| **XTRA** | eDoc Transfer All (screens and edits) |
| **XTRE** | eDoc Transfer Edits |
| **XTRS** | eDoc Transfer Screens |
| **XVIE** | eDoc Real-Time Inquiry Performed |
| **XXLC** | eDoc Cancellation Confirmation |
| **XXLN** | eDoc Cancellation Request |
| **XXLP** | eDoc Cancellation Pending |
| **ZCAN** | Policy cancellation downloaded |
| **ZCON** | Conversion Activity |
| **ZNEW** | New policy downloaded |
| **ZNON** | Policy non-renewal downloaded |
| **ZNWQ** | New policy quotes downloaded |
| **ZPAU** | Policy premium audits downloaded |
| **ZPCH** | Policy change downloaded |
| **ZREI** | Policy reinstatement downloaded |
| **ZREN** | Renewal policy downloaded |
| **ZREW** | Policy rewrite downloaded |
| **ZRIS** | Reissued policy downloaded |
| **ZRNR** | Reversal of policy non-renewal downloaded |
| **ZRWQ** | Renewal quotes downloaded |
| **ZSYN** | Database synchronization downloaded |

## Attachments

### **Access Levels**

|  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Access levels allow restriction of access to attachments by granting security rights to certain groups. The default Access Level = Public.   |  |  | | --- | --- | | **Access Level** | **Description** | | 1 | HIPAA | | 2 | Accounting | | 3 | Client Financials | | 4 | HR Consulting | | 5 | W-9 | |

### **Folder Structure**

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
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| **Attachment Folder Sub Folder 1 Sub Folder 2**   |  |  |  |  |  | | --- | --- | --- | --- | --- | | Accounting | | Agency Bill | |  | | Check Requests – Carrier | |  | | Check Requests – Client | |  | | Checks | |  | | Client Payment Requests | |  | | Contingent | |  | | Direct Bill | |  | | Discrepancies – Billing | |  | | Discrepancies – DB Commission | |  | | Financing | |  | | W9 | |  | | Billing | | Direct Bill | |  | | Fee Agreements | |  | | Invoices | |  | | Receipts | |  | | Statements | |  | | Bonds | Agreement & Contracts | |  | | | Audits | |  | | | Bond Form | |  | | | Cancellations | |  | | | Claims | |  | | | Correspondence | |  | | | Endorsements | |  | | | Financial Statements | |  | | | Marketing | |  | | | Proposals | |  | | | Reports/Summaries | |  | | | Supplemental Underwriting | |  | | | Broker of Record |  | |  | | | Client Information |  | |  | | | Contracts and Agreements |  | |  | | | eDocs |  | |  | | | Intelligent Automation | Coverage Confirmation Checklist | |  | | | Prior Database Attachments |  | |  | | | Property & Casualty | Applications | |  | | | Audits | |  | | | Auto IDs | |  | | | Bind Requests | |  | | | Binders | |  | | | Cancellations | |  | | | Certificates | | Additional Insured Endorsements | | | Change Requests | |  | | | Claims | | Claim Correspondence | | | Claim Invoices | | | Claim Payments | | | Estimates | | | Loss Notice | | | Loss Runs | | | Photos | | | Correspondence | |  | | | Evidence of Insurance | |  | | | Filings | |  | | | Inspection Reports | |  | | | Marketing | |  | | | MVR’s | |  | | | Policies | | All Other Policies | | | Auto | | | Liability | | | Property | | | Workers Compensation | | |  | | Package | | | Policy Checking | |  | | | Proposal | |  | | | Quotes | |  | | | Renewal | | Underwriting Support Docs | | | Schedules | |  | | |  | Summary | |  | | |  | Underwriting Information | |  | | | Sales |  | |  | | |

### **[Attachment Naming Conventions](#_JA.6_Attachment_Naming)**

|  |  |  |
| --- | --- | --- |
| [Document Type](#_JA.6_Attachment_Naming) | [Naming Convention](#_JA.6_Attachment_Naming) | [Example](#_JA.6_Attachment_Naming) |
| [PL Policy](#_JA.6_Attachment_Naming) | [YY-YY (Line of Business) Policy](#_JA.6_Attachment_Naming) | [23-24 Homeowners Policy](#_JA.6_Attachment_Naming) |
| [CL Policy](#_JA.6_Attachment_Naming) | [YY-YY (Line of Business) Policy](#_JA.6_Attachment_Naming) | [23-24 General Liability Policy](#_JA.6_Attachment_Naming) |
| [Endorsement to carrier](#_JA.6_Attachment_Naming) | [YY-YY (Line of Business) Endorsement (#) to (Carrier) Eff MM-DD-YY change description,](#_JA.6_Attachment_Naming) | [23-24 Auto Endorsement to Travelers Eff 6-29-23 Adding 2024 Ford Explorer Vin (last 4)  23-24 General Liability to Fran @ Travelers Endorsement Eff 6-29-23 Amend Sales to $500,000  23-24 Home Endorsement to processing team Effective 6-29-23 Increase home limit to $550,000](#_JA.6_Attachment_Naming) |
| [Cancellation Confirmation](#_JA.6_Attachment_Naming) | [YY-YY (Line of Business) Cancellation, Eff MM-DD-YY, Reason](#_JA.6_Attachment_Naming) | [23-24 Auto Cancellation, Effective 6-29-23, Non-Payment of Premium](#_JA.6_Attachment_Naming) |
| [Audit](#_JA.6_Attachment_Naming) | [YY-YY (Line of Business) Audit, Carrier, AP/RP](#_JA.6_Attachment_Naming) | [22-23 General Liability Final Audit Additional/Return Premium $35,827](#_JA.6_Attachment_Naming) |
| [Intent to Cancel](#_JA.6_Attachment_Naming) | [YY-YY (Line of Business) Intent to Cancel, Eff MM-DD-YY, Carrier, reason](#_JA.6_Attachment_Naming) | [23-24 General Liability, Intent to Cancel, Eff 6-29-23 IPFS, non-payment of premium 23-24 Auto, Intent to Cancel, Eff 6-29-23 Travelers, Underwriting - MVR John Smith](#_JA.6_Attachment_Naming) |
| [Nonrenewal Notice](#_JA.6_Attachment_Naming) | [YY-YY (Line of Business) Non-Renewal Notice, Eff MM-DD-YY, Carrier, reason](#_JA.6_Attachment_Naming) | [23-24 Auto Non- Renewal Notice, Eff 6-29-23 Travelers, no longer a market](#_JA.6_Attachment_Naming) |
| [Reinstatement](#_JA.6_Attachment_Naming) | [YY-YY (Line of Business) Reinstatement Eff MM-DD-YY](#_JA.6_Attachment_Naming) | [23-24 Auto Reinstatement Eff 06-29-23](#_JA.6_Attachment_Naming) |
| [Quotes](#_JA.6_Attachment_Naming) | [YY-YY (Line of Business) Quote Carrier, Quote $](#_JA.6_Attachment_Naming) | [23-24 Workers Comp Quote, Hartford, $500](#_JA.6_Attachment_Naming) |
| [Applications](#_JA.6_Attachment_Naming) | [YY-YY (Line of Business) Application, Carrier (to be Completed, signed etc) YY-YY (Line of Business) Application, Carrier (completed, signed etc)](#_JA.6_Attachment_Naming) | [23-24 Auto Application Travelers, to be completed/signed 23-24 General Liability Hartford Contractor Supp completed and signed](#_JA.6_Attachment_Naming) |
| [Carrier Submissions](#_JA.6_Attachment_Naming) | [YY-YY (Line of Business) Submitted to (Carrier)](#_JA.6_Attachment_Naming) | [23-24 General Liability, Auto Umbrella Submission to Mike@Hartford](#_JA.6_Attachment_Naming) |
| [Endorsement Received](#_JA.6_Attachment_Naming) | [YY-YY (Line of Business) Endorsement (#) received Eff MM-DD-YY change description AP/RP](#_JA.6_Attachment_Naming) | [23-24 General Liability Endorsement Effective 5-1-23 amending sales](#_JA.6_Attachment_Naming) |
| [Emails](#_JA.6_Attachment_Naming) |  | [To/from Sam/Insd request for information on 2012 Ford](#_JA.6_Attachment_Naming) |
|  |  | [To/From Jim/Liberty/UW request for MVR information](#_JA.6_Attachment_Naming) |

**EPIC WORKFLOWS**

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Description automatically generated

## **Best Practice Guide for Addresses & Contacts**

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| ***Contact information is an important part of the Client Account record. Please follow these guidelines to keep the data clean.*** |

### **Client Name**

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| For Commercial and Employee Benefits accounts where the account name is an entity and not an individual.   * Enter only **ONE** business name, **not multiple.** * Enter a **legal** business name. * Additional Business names, DBAs, or Subsidiary Names should be added to the **Contacts** area of the client account. |

### **Client Addresses**

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| * **First Address Line**: Enter Street address only – No Names, DBA’s, or PO Boxes * DO NOT add P.O. Box instead, add the entity as another business contact with L-Mailing as the description   A screenshot of contact information  Description automatically generated   * + It is okay to include Suite Number, Apartment Number, Floor Number with the street address.   A screenshot of a computer  Description automatically generated   * + **A screen shot of a computer      Description automatically generatedA screen shot of a computer      Description automatically generatedDO NOT INCLUDE DBA NAME OR NAME OF INSURED CONTACT IN THE FIRST LINE OF THE ADDRESS FIELD. See proper instructions on adding a** [**DBA**](#_Add_Business_Contact) **and a** [**Contact**](#_Add_Individual_Contact)**.** * **Second Address Line:** Add P.O Box, if applicable (see note above) or Attn: * **Be sure to enter City, State & Zip Code** * **Address validation tools** are used in Epic Browser and AcriVision mapping and will create errors if the street address is not shown on the first line. * **Add a Contact and Address Description:**   + Contact – Named Insured   + Address – Primary Physical Address * **Additional Mailing or Billing addresses** can be set up as Contacts – do not forget to add address and Contact descriptions such as DBA, L-Billing or Post office Box. |

## **New Business Activities:**

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| Activity Code | Description |
| AOP | New Business Opportunity – System generated when adding Opportunity |
| QNEW | New Business Quote Activity – Manually generated for each online carrier portal and Auris |
| SCAS | Submission to Carrier Activity – System generated with each Carrier Submission from Master Marketing |
| PROP | Proposal generated |
| APOL | System generated when Policy shell built in Current/Renewed policy Screen |
| BND1 | System generated when Submission moved from Marketed to Current/Renewed policy screen |
| BORP | System generated when adding a new policy obtained through a BOR |
| CPCK | Manually created activity created to have a policy attached and checked in on |

### **Prospect**

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| 1. Receive request from client for quoting  2. Add Prospect in Epic, including Client name(s), addresses, phone numbers, email addresses, and contacts living in the household.  3. Add notes to the ADD2 (adding a prospect) or ADD1 (if already bound business) activity - describe who, what, why, etc. - then close the activity as successful. |

#### **Add New Client (Prospect or Insured)**

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| 1. Click **LOCATE** 2. Click the **Add** button (+) 3. **Add Account**    1. Select the Business radio button.    2. Type of Business = **Commercial** (Multiple types of business can be selected)   A close up of a computer screen  Description automatically generated   1. **Account Information**    1. **Account Name** – Enter the legal name of the business Entity**.**    2. **Client Type** – Prospect or Insured    3. **Account Source** – Select Appropriate from the dropdown list.    4. **Structure** – Select Agency & Branch from the dropdown list.   A screenshot of a computer  Description automatically generated   1. **Business Contact Information**    1. **Address** – enter valid address (will be verified and auto-filled when selected)    2. A popup will appear if there are possible address duplicates found.    3. Enter address description, if needed (i.e., Business, Mailing Address, etc.)   A screenshot of a contact information  Description automatically generated   1. **Business Phone**    1. Enter Type (i.e., Business, Mobile, Residence, etc.)    2. Enter Number (must include all 10 digits)    3. Permission – select from dropdown.    4. **SMS** = check to enable this number for SMS Text Messaging    5. Click Yes to enable conversational SMS for this number   A screenshot of a computer  Description automatically generated   * 1. Click **+Phone** to add additional phone numbers.   A close-up of a computer screen  Description automatically generated   1. **Email/Website**    1. Enter Account Email & Website   A screenshot of a computer screen  Description automatically generated   1. **Identification Numbers**    1. Enter NAICS number (required) and SIC, if desired      1. **Primary Contact Information**    1. Enter **primary contact** name and date of birth (the person most often spoken with on behalf of this client)    2. Enter **primary contact phone.**    3. Click **+Phone** to add additional phone numbers.   A screenshot of a computer  Description automatically generated   1. Enter **Primary Contact Email** and **contact preferences.**   A screenshot of a computer  Description automatically generated   1. **Agency Information**    1. **Agency Defined Categories** – predetermined by the agency; used to tag an account for a specific reporting purpose (i.e., to mark it as a VIP account) (Currently only EB is using)   A blue and white rectangle with black lines  Description automatically generated   * 1. **Relationships** – add related accounts (i.e., account subsidiaries)   A screenshot of a computer  Description automatically generated   1. Click **Save Account**      1. **Activity**: **ADD2** (add Prospect) or **ADD1** (Insured)    1. Defaults closed.   Click **FINISH** *\*\*NOTE – all notations, correspondence, and documents are located on the* ***AOP*** *Activity.*   1. **Account Details**    1. Click the **Servicing Tab** and enter all applicable staff names within the Servicing Roles   A screenshot of a computer  Description automatically generated   1. Enter # of Employees in the **Employee Benefits** Tab (only if there currently are no Employee Benefits on the account) A screenshot of a computer     Description automatically generated |

### **Quoting/Marketing**

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| 1. Receive request from prospect for quoting  2. Add Prospect in Epic, including Client name(s), addresses, phone numbers, email addresses, and contacts living in the household.  3. Create New Opportunity and **AOP** activity - describe who, what, why, etc. – and attach any correspondence, and documents collected to start the marketing process |

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| Use [Auris/Tarmika](https://auris.acrisure.com/app/placement)for rating **OR**  Use carrier portals for rating **OR**  Use [Marketing Module Lite](#_JA.1_Marketing_Module) or [Marketing Module Full](#_JA.2_Marketing_Module_2) for Carrier Submissions |

#### **Create Activity when Using Auris/Tarmika, Online Carrier Quoting or** [**Marketing Module Lite**](#_JA.1_Marketing_Module)

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| * Create**QNEW** activity for each carrier quoted to document file and save attachments, update Activity with quoted ICO, PPE, and Quoted Premium in the Amount field.   A screenshot of a computer  Description automatically generated   * If the Servicer prefers to use one activity for all attachments, once the **QNEW** activity for each carrier has been updated per above, all notes and attachments (including the quote) can be attached and saved to the **AOP** activity. * Present quotes to the client and document the **QNEW**/**AOP** Activity. * When a carrier is selected, either bind online or send a Bind Request to the carrier via email; save the sent email to **QNEW**/**AOP** activity.   **Update Activity When Quote Selected**   * For the **binding carrier,** close the **QNEW** for the carrier as successful and add final notes. * For **non-binding carriers,** close each **QNEW** as unsuccessful and select the reason; add notes. * When the policy is bound, [Add New Policy](#_Add_New_Policy) in Epic, or if using [Marketing Module Lite](#_JA.1_Marketing_Module) move from marketed to Current/renewed screen. * **APOL/BND1** activity will auto-generate for the policy to be attached and checked in; If utilizing a third Party/workgroup, reassign accordingly. * Close **AOP** Activity as Successful. |

#### **Add New Policy**

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| 1. Click Policies from the left Navigation Panel. 2. Click the ADD button - select Contracted policy. 3. Enter Policy Details:    1. Select Policy Type from dropdown list (click the Description header to sort by description)    2. Policy Line – description will default.    3. Policy number – enter Policy Number as TBD if unknown.  * Do not add additional characters (spaces, dashes) to ensure download success.   1. Effective/Expiration date: update as needed.   2. Source: choose from the dropdown (required field)   3. Agency = **1WC, WCD**, or **IPI**   4. Branch = **1WC, WCD**, or IPI unless the entity you work for is in earnout then use the entity's legal business name   5. Department: Select the department based on the account revenue size  |  |  |  | | --- | --- | --- | | **CLS** | Commercial Small | Under $2,500 in revenue | | **CLM** | Commercial Middle | $2,500 - $10K in revenue | | **CLL** | Commercial Large | $10,001+ in revenue |  * 1. Status = Select NEW   2. Issuing Location – verify   3. Bill Type: Select Agency or Direct Bill   4. Select Profit Center = Select COM unless the policy fits into a specific practice group  (Note: Options shown in the dropdown are based on Department selected)   5. Issuing Company – Select from the dropdown list (Click the description header to sort by Name)   6. Premium Payable Entity - Select from the dropdown list (Click the description header to sort by Name)   A screenshot of a computer  Description automatically generated   * 1. If PPE is a Broker, change CA to BR and enter the broker’s name from the dropdown list   A screenshot of a computer  Description automatically generated  NOTE: Be sure to select the appropriate PPE Contract if BR is selected)   * 1. Payable Contract: If Description ACH Carrier Group is available choose it otherwise choose Default Premium/Commission Payable Contract   A screenshot of a computer  Description automatically generated   1. Line Commission: Enter carrier policy commission percentage if known.  * If unknown * Check the box to use the commission agreement. * Select the policy type with Acrisure Estimate Rate in the dropdown      1. Line estimated premium: Estimated Annual Premium only (no taxes or fees). Enter premium quoted.   A screenshot of a computer  Description automatically generated   1. Click Detail 2. ACTIVITY: Select APOL - For Policy to be attached and checked in    1. Verify Who/Owner    2. Follow-up/Start Date    3. Add Notes and click Finish. 3. From the Navigation Panel, click Servicing/Billing > Line    1. Pr/Br Tab (Required): Each policy requires at least one PPAY (NOTE: PPAYs are Employees; BPAYs are outside brokers)       1. If a Producer is paid commission on a policy, enter his/her name from the dropdown list.       2. When selected use Commission Agreement       3. Override Commission Agreement – only for specific scenarios and supporting documentation is required and a Team lead has approved.          1. Be sure to enter 100% Production Credit (this is not commission-related but gives the producer credit for booking the business written). NOTE: BPAYs never receive Production Credit    2. Servicing Tab: Verify Servicing Roles    3. Billing: Send Invoice To section to show the Contact as the company name, not the individual contact 4. For Non-Download Carriers only: update policy detail on the left panel before moving to step 10 5. Click the X on the left navigation pane 6. Click – Yes Perform Action > Update Stage to Submitted; click Finish. |

#### **When using** [**Marketing Module Full**](#_JA.2_Marketing_Module_2) **for Carrier Submissions**

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| * From **Opportunities** go to New (+) and scroll down to Master Marketing Submission.   A screenshot of a computer  Description automatically generated   * Follow the [Marketing Module Full](#_JA.2_Marketing_Module_2) Job Aid. * Utilize system-generated **SCAS** activity for each carrier quoted to document file and save attachments, update Activity with quoted ICO, PPE, and Quoted Premium in the Amount field. * If the Servicer prefers to use one activity for all attachments, once the **SCAS** activity for each carrier has been updated per above, all notes and attachments (including the quote) can be attached and saved to the **AOP** activity. * Present quote(s) to the client and document the **SCAS**/**AOP** Activity. * When a carrier is selected, send a Bind Request to the carrier via email; save the sent email to **SCAS/AOP** activity.   **Update Activity When Quote Selected**   * For the **binding carrier,** close the **SCAS** for the carrier as successful and add final notes. * For **non-binding carriers,** close each **SCAS** as unsuccessful and select the reason; add notes. * When the binder is received move carrier submission from Marketed to Current/renewed policy screen per [Marketing Module Full](#_JA.2_Marketing_Module_2). * **BND1** activity will auto-generate for the policy to be attached and checked in; If utilizing a third Party/workgroup, close this activity and create **CPCK** activity, and reassign. * Close **AOP** Activity as Successful. |

#### **Policy Received from Carrier**

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| **DOWNLOAD:**   1. Downloaded policies will automatically update the policy stage to Issued with the policystatus **- NEW.** 2. **ZNEW** activity will generate and is set to close automatically. 3. Review the **Daily Download Report** to view downloads received to update policy/client records with missing information. 4. Policy Check for accuracy: Reassign **APOL** activity to 3rd Party/Workgroup to attach Policy for Policy check or manually create a **CPCK** Activity (F9 or NEW > Activity); assign it to 3rd Party/Workgroup to attach the policy for policy check.    1. When the policy is attached to the **APOL** Activity, **Mark as an Important Policy Document** – this will automatically attach to the policy and the activity.   A screenshot of a computer  Description automatically generated   * 1. If the Policy is inaccurate, leave **APOL**/**CPCK** open for follow-up; send to carrier or account servicer for correction.   2. Processor will create a note when the policy checking is complete.  1. Close the **APOL/CPCK** activitiesas **successful.**   **NON-DOWNLOAD:**   1. Policy Check for accuracy. Reassign **APOL** or **BND1** Activity to a Third-Party Vendor or Account Manager to attach Policy for Policy check or manually create a **CPCK** Activity (F9 or NEW > Activity); assign it to 3rd Party/Workgroup to attach the policy for policy check.    1. When the policy is attached to the **APOL** Activity, **Mark as an Important Policy Document** – this will automatically attach to the policy and the activity.   A screenshot of a computer  Description automatically generated   * 1. If the Policy is inaccurate, leave the activity open for follow-up; send to carrier for correction.   2. Processor will create a note when the policy checking is complete.  1. From the policy: **ACTIONS > Issue/Not Issue Policy** 2. Click the **Close Activity tab** and close **the APOL/BND1/CPCK** activity**.**     [Add Client to CSR24 Client Portal](#_JA.7_Attachment_Naming) (if applicable)  [Issue EPIC Auto ID Cards](#_Auto_ID_Cards)  [Issue Evidence of Property Insurance](#_Evidence_of_Property)  [Issue Certificate of Liability Insurance](#_Certificate_Processing_in)  [Platform Activities Guide - Servicers](https://acrisure.sharepoint.com/:w:/s/ACR-ABSAccountingTeam/ESAdZgcBwPdJt0_n5-hNILkBueeqZpQWrGK6rg54rr9l7g?e=4LVSdM&clickparams=eyJBcHBOYW1lIjoiVGVhbXMtRGVza3RvcCIsIkFwcFZlcnNpb24iOiI0OS8yMzExMzAyODcyNCJ9&wdLOR=cC0B69E85-42BA-450A-8908-0E0D906D9928) |

#### **Add BOR Policy**

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| * Receive the signed BOR from the prospect or existing client. * Follow [Add Account Workflow](#_Add_New_Client) for new clients or if an existing client locate Client Account. * Create New Opportunity and **AOP** activity - describe who, what, why, etc. – and attach any correspondence, and documents collected to start the marketing process * Click Policies from the Navigation Panel (left) * Click the **ADD** button - Select Prospective or Contracted * Enter Policy Type from the dropdown list. * Change Policy Description as needed. * Enter policy number if known.   1. Do not add additional characters (spaces, dashes) to ensure download success. * Verify the following:   1. **Effective and expiration dates** (defaults to system date and one-year term) * Effective date should be the date of the carrier BOR & Expiration should match the policy date.   1. **Source:** choose from the dropdown **(required field)**   2. **Structure**: Agency, Branch, Department (Set defaults under Config/User Options)   3. **Lines of Business**:   4. Policy Line   5. Status = **BOR**   6. Select Profit Center   7. **Issuing Company** – Select from the dropdown list (Click the description header to sort by Name)   8. **Premium Payable Entity** - Select from dropdown list (Click description header to sort by Name)   A screenshot of a computer  Description automatically generated   * 1. If PPE is a Broker, change **CA** to **BR** and enter the broker name from the dropdown list   A screenshot of a computer  Description automatically generated  **NOTE: Be sure to select the appropriate PPE Contract if BR is selected)**  **A close up of a sign  Description automatically generated**   * 1. **Payable Contract:** If Description ACH Carrier Group is available choose it otherwise choose Default Premium/Commission Payable Contract   A screenshot of a computer  Description automatically generated   1. Add Carrier Commission percentage if known.  * If unknown * Check the box to use the commission agreement. * Select the policy type with Acrisure Estimate Rate in the dropdown      * 1. Line estimated premium: Estimated Annual Premium only   2. Click Detail   3. Activity = **BORP** – Utilized to receive, attach, and check in Policy brokered.   4. Add detailed notes, leave open to follow up on receipt of policy; click **Finish**. * Complete:   1. **PR/BR Tab:** Enter the PR/BR name from the dropdown list if the area is not defaulted. * Use **Commission Agreement** * **Override Commission Agreement** – only for specific scenarios and supporting documentation is required.   1. **Servicing Tab:** Enter Policy Producer and Policy Servicer   2. **Billing Tab:** Verify Invoice information and delivery method.   3. **Line Tab:** Enter Estimated Premium and Estimated Commission if known. * Close **AOP** activity as Successful. * Follow the Steps for [Policy Received from Carrier](#_Policy_Received_From) above. * After Policy Checking is Complete, close out **BORP** activity with detailed notes and close **Opportunity** as **Won.** |

### **Non-Insurance Products**

#### **Department and Profit Center – OTH – Non-Insurance Products**

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| GACR | Acrisure Real Estate Services Referral |
| GACS | Acrisure Cyber Services Referral |
| The Acrisure Extraordinary Advantage is that we can offer additional products and services in addition to insurance and risk management.   * Acrisure Cyber Services * Acrisure Real Estate/Title Services * AcriSource PEO Brokering * Other non-Acrisure referrals (payroll, etc.)   ***When a referral is given to the Real Estate or Cyber division of Acrisure, or any outside carrier or vendor a policy shell must be created to receive the renewal commission***.  Follow Add Policy Workflow and confirm the following:   * **Policy Type**: Code begins with “R”   **RACS**   Acrisure Cyber Services  **RPEO** PEO  **RTIT** Acrisure Title Referral  **RPA2**   Payroll Referral  **RPEN** Pension Referral  **RSLO** SMB Loan Referral  **R401** 401K Referral   * **Policy Line**: Will default from Policy Type * **Policy Number**: Enter Policy number or TBD if unknown * **Eff/Exp Dates**: Update as needed * **Source**: Choose from the Drop-Down * **Agency & Branch**: Will default from Account Detail * **Department**: OTH * **Status:** NEW * **Issuing Location**: Verify * **Bill Type**: Agency or Direct Bill * **Profit Center**: OTH * **Issuing Company**: SERVIC (Service Only) * **Premium Payable**: Select BR, then the appropriate carrier or vendor. If the vendor is new, email you REA, Regina Kanen. * **Line Commission**: Enter carrier policy commission percentage. \*\*If unknown * Check the box to use the commission agreement. * Select the policy type with Acrisure Estimate Rate in the dropdown      * **Line Estimated Premium**: Estimated annual premium only (no taxes or fees)   Click Detail:   * **Activity**: Select **APOL** - for the policy to be attached and checked in * Verify who/owner * Follow-up/Start Date * Add Notes and click Finish * From the Navigation panel, click Servicing/Billing>Line * **Servicing Tab**: Non-Insurance Product Sales * **Billing:** Send Invoice To section to show the Contact as the contact that should appear on an agency bill invoice * Pr/Br Tab: Each policy requires at least one PPAY * If a Producer is paid a commission on a policy, enter his/her name from the dropdown. * Use Commission Agreement * Override Commission agreement only for specific scenarios and supporting documentation is required * Be Sure to enter 100% production credit (this is not commission-related but gives the producer credit for booking the business written) **NOTE:** BPAYs never receive the Production Credit * Click the X on the left navigation pane.  Click – Yes Perform Action > Update Stage to Submitted; click Finish. | |

#### **Setting up PEO Types**

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| A screenshot of a computer  Description automatically generated |

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| **Policy Code** | **Description** | **ICO Code** | **ICO Description** | **PPE Type** | **PPE Code** | **PPE Description** |
| R401 | 401k Referral | SERVIC | SERVICE ONLY | BR | HUMAINT-01 | Human Interest |
| RACS | Acrisure Cyber Services | SERVIC | SERVICE ONLY | BR | ACRICYB-01 | Acrisure Cyber Services |
| RODP | On Demand Pay Referral | SERVIC | SERVICE ONLY | BR | DAILPAY-01 | Daily Pay |
| RPA2 | Payroll Referral | SERVIC | SERVICE ONLY | BR | ISOLVE0-01 | iSolved |
| RPEO | PEO | SERVIC | SERVICE ONLY | BR | Varies based on who it's written with |  |
| RPEW | PEO Workers Compensation | SERVIC | SERVICE ONLY | BR |  |  |
| RPRP | Portable Retirement Plan Referral | SERVIC | SERVICE ONLY | BR |  |  |
| RSLO | SMB Loan Referral | SERVIC | SERVICE ONLY | BR | ONDECK0-01 | OnDeck |
| RSUB | Subscription Membership | SERVIC | SERVICE ONLY | BR |  |  |
| RTIT | Acrisure Title Referral | SERVIC | SERVICE ONLY | BR |  |  |

## **Renew Policy Workflow**

### **Renewal Activities:**

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| Activity Code | Description |
| CLRR | Renewal Activity – Auto generated at 120 days before expiration to house all documentation, correspondence and documents for renewal including binder (If applicable) |
| CARN | Renewal Activity – Manually created when renewal is an automatic & downloaded renewal – includes further actions sending out a pre-renewal email, then 30 days after a reminder, and finally after another 30 days activity closes as unsuccessful if the Servicer did not receive a response. |
| CAWC | Renewal Activity – Manually created when renewal is an automatic & downloaded renewal – includes further actions sending out a pre-renewal email, then 30 days after a reminder, and finally after another 30 days activity closes as unsuccessful if the Servicer did not receive a response. |
| CPCK | Manually created activity created to have policy attached and checked in on |
| C-CR | Manually created activity for Certificate Renewal |
| QREW | Renewal/Rewrite Quote Activity – Manually generated for each online carrier portal and Auris |
| SCAS | Submission to Carrier Activity – System generated with each Carrier Submission from Master Marketing |
| BND1 | System generated when Submission moved from Marketed to Current/Renewed policy screen |
| PROP | Proposal Generated |
| RPOL | System generated when current policy renewed in Current/Renewed policy screen |

### **Downloaded Renewals**

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| * **CLRR** activity will auto-generate on the servicer’s home base **120 days** in advance of renewal * This activity has 3 Tasks that Servicer 1 will work on and 5 Tasks that can be set to Not applicable. ***\*\* Please review Task notes for each task*** * This activity is to remain with the Servicer 1 as the owner   1. AM – Update Activity Description & Provide Instructions – ***Follow Task Notes***   2. AM – If Automatic renewal without Marketing – *Set* ***CARN/CAWC*** *depending on policy type and follow Task Notes*   3. AM – If Loss Runs or MVRs are required - ***Set to Not-applicable***   4. AC – Obtain Renewal Requirements & Attach Schedules/Forms – ***Set to Not-applicable***   5. AC – Obtain Renewal Updates from Insured – ***Set to Not-applicable***   6. AM/AC – Obtain Renewal Quote from Carrier - ***Set to Not-applicable***   7. AM – Renewal Presentation/Bind - ***Set to Not-applicable***   8. AM – Wrap-up Activity – ***Follow Task Notes*** * Open **CPCK** (Policy Check) activity and set it to Third-party/Workgroup 60 days before the expiration of the current policy (if applicable). If not utilizing a Third-party/Workgroup, set it to Servicer 1. * Downloaded policies will automatically renew the new term as **Issued** and update the **status** to **REN.** If it is a renewal/rewrite, manually update the **status** to **REW.** * **ZREN** automatic closed activity (created by download) * Review the **Daily Download Report** for downloads received to update policy/client records with missing information. * **RPOL/CPCK** - Policy Check for accuracy   + When the policy is attached to the **CPCK** Activity, **Mark as an Important Policy Document** – this will automatically attach to the policy and the activity.      * + If the Policy is inaccurate, leave **CPCK** open for follow-up; send to carrier or account servicer for correction.   + If the Policy is accurate, Issue policy – Actions>Issue/Not Issue Policy and close **RPOL/CPCK**.   + The processor will create a note when policy checking is complete. * Close the **RPOL/CPCK** activity as successful * Issue Proofs – [ID Cards](#_Auto_ID_Cards), [Evidence of Property](#_Evidence_of_Property), and/or [Certificate of Liability Insurance](#_Certificate_Processing_in) |

### **Non-Downloaded Renewals**

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| * **CLRR** activity will auto-generate on the servicer’s home base **120 days** in advance of renewal * Review the upcoming renewal list **120 days** in advance * This activity has Tasks that Servicer 1 can assign to other individuals to assist with the renewal. ***\*\* Please review Task notes for each task*** * This activity is to remain with the Servicer 1 as the owner   1. AM – Update Activity Description & Provide Instructions – ***Follow Task Notes***   2. AM – If Automatic renewal without Marketing – *Set* ***CARN/CAWC*** *depending on policy type and follow Task Notes if applicable*   3. AM – If Loss Runs or MVRs are required – **If none needed** ***Set to Not-applicable***   4. AC – Obtain Renewal Requirements & Attach Schedules/Forms – **If not automatic renewal *Set to AC if applicable***   5. AC – Obtain Renewal Updates from Insured – **If not automatic renewal *Set to AC if applicable***   6. AM/AC – Obtain Renewal Quote from Carrier - **If not automatic renewal *Set to AC if applicable***   7. AM – Renewal Presentation/Bind – ***Follow Task Notes***   8. AM – Wrap-up Activity - ***Follow Task Notes*** * Receive & review new term policy/quote from the carrier – policy check against details from the expiring term. * From policy in Epic, **ACTIONS > Renew.** * System-generated **RPOL** activity (used to attach and to check in policy by Servicer 1) – If utilizing a Third Party/Workgroup – you have the option of closing the **RPOL** and opening a **CPCK,** to assign to the appropriate workgroup 30 days after the effective date for the Policy document to be attached checked and issued. * Review and update details within the Navigation Pane (i.e., policy number, effective/expiration dates, Dept, Status, Profit Center, ICO & PPE, Billing, Pr/Br, coverages, premium, etc.) * Epic will auto-set the **Policy status to REN;** if it is a renewal/rewrite, manually update the status **to REW.** * Use the X in the Navigation pane and select **Yes, perform action: Update State to Submitted** and close **CLRR** activity. * **RPOL/CPCK** - Policy Check for accuracy   + When the policy is attached to the **RPOL/CPCK** Activity, **Mark as an Important Policy Document** – this will automatically attach to the policy and activity.      * + If the Policy is inaccurate, leave **RPOL/CPCK** open for follow-up; send to carrier or account servicer for correction.   + If the Policy is accurate, Issue policy – Actions>Issue/Not Issue Policy and close **RPOL/CPCK**.   + The processor will create a note when policy checking is complete. * Send a copy to the client with a form letter if not sent by carrier. * Issue Proofs – [ID Cards](#_Auto_ID_Cards), [Evidence of Property](#_Evidence_of_Property), and/or [Certificate of Liability Insurance](#_Certificate_Processing_in) * [Platform Activities Guide - Servicers](https://acrisure.sharepoint.com/:w:/s/ACR-ABSAccountingTeam/ESAdZgcBwPdJt0_n5-hNILkBueeqZpQWrGK6rg54rr9l7g?e=4LVSdM&clickparams=eyJBcHBOYW1lIjoiVGVhbXMtRGVza3RvcCIsIkFwcFZlcnNpb24iOiI0OS8yMzExMzAyODcyNCJ9&wdLOR=cC0B69E85-42BA-450A-8908-0E0D906D9928) |

### **Renewals changing from Package to a Monoline Policy**

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| * From the current policy in Epic, renew one line in a package at a time, **Actions > Renew.** * Update the Policy Type from a **CPK1** to the Monoline policy type, uncheck the lines not to be renewed, and click Finish. * Continue the process until all lines are renewed. * System-generated **RPOL** activity (used to attach and to check in policy by Servicer 1) – If utilizing a Third Party/Workgroup – you have the option of closing the **RPOL** and opening a **CPCK,** to assign to the appropriate workgroup 30 days after the effective date for the Policy document to be attached checked and issued. * Review and update details within the Navigation Pane (i.e., policy number, effective/expiration dates, Dept, Status, Profit Center, ICO & PPE, Billing, Pr/Br, coverages, premium, etc.) * Epic will auto-set the **Policy status to REN;** if it is a renewal/rewrite, manually update the status **to REW.** * Use the X in the Navigation pane and select **Yes, perform action: Update State to Submitted** and close **CLRR** activity. * **RPOL/CPCK** - Policy Check for accuracy   + When the policy is attached to the **RPOL/CPCK** Activity, **Mark as an Important Policy Document** – this will automatically attach to the policy and activity.      * + If the Policy is inaccurate, leave **RPOL/CPCK** open for follow-up; send to carrier or account servicer for correction.   + If the Policy is accurate, Issue policy – Actions>Issue/Not Issue Policy and close **RPOL/CPCK**.   + The processor will create a note when policy checking is complete. * Send a copy to the client with a form letter if not sent by carrier. * Issue Proofs – [ID Cards](#_Auto_ID_Cards), [Evidence of Property](#_Evidence_of_Property), and/or [Certificate of Liability Insurance](#_Certificate_Processing_in) * [Platform Activities Guide - Servicers](https://acrisure.sharepoint.com/:w:/s/ACR-ABSAccountingTeam/ESAdZgcBwPdJt0_n5-hNILkBueeqZpQWrGK6rg54rr9l7g?e=4LVSdM&clickparams=eyJBcHBOYW1lIjoiVGVhbXMtRGVza3RvcCIsIkFwcFZlcnNpb24iOiI0OS8yMzExMzAyODcyNCJ9&wdLOR=cC0B69E85-42BA-450A-8908-0E0D906D9928) |

## **Policy Setup – Invoice Needed prior to Binding**

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| **The following workflow details the modifications to the renewal or marketing workflow when an invoice is needed, or you provide an Applied Pay link before binding coverage with the carrier.** |

### **Create Policy**

#### **Policies – Current/Renewed (no marketing module used)**

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| 1. Highlight policy, **ACTIONS > Renew.** 2. Update the Policy number to **TBD** to the beginning to show that it is not an active policy. 3. Confirm the accuracy of or update Policy type, Effective date, Expiration date, Agency, Branch, Department, Line type, Status, Bill type, and Profit Center. 4. Update the Issuing and Billing company to the **Issuing Company** and the **Premium Payable** carrier or broker listed on the Quote. 5. Enter the carrier policy commission percentage if known.  * If unknown * Check the box to use the commission agreement. * Select the policy type with Acrisure Estimate Rate in the dropdown      1. Line estimated premium: Estimated Annual Premium only (no taxes or fees). Enter premium quoted.   A screenshot of a computer  Description automatically generated   1. Click DETAIL   A screenshot of a computer  Description automatically generated   1. **RPOL** activity – add notes (including that this policy is not bound) and amend the Follow-up/Start date to a future date to pend for receipt of policy and FINISH. 2. Review and Update Billing, Pr/Br, and application details; when finished click the X in the navigation panel to close. 3. Leave policy “In Process” and FINISH. 4. Highlight the renewed policy, **ACTIONS > Change Policy Perspective/Contracted Status** and click YES. |

#### **Policies – Marketed (marketing module used)**

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| 1. Follow marketing or marketing lite workflow through Creating Carrier Response. 2. Highlight carrier submission, **ACTIONS > Move Marketed Lines to Current Policies.** 3. **Policies tab**    1. Select **Add** new policy, **Renew** existing policy, or **Update** existing policy    2. Enter Policy type.    3. Confirm the accuracy of or update the Description, Effective date, and Expiration date    4. Update Policy # to **TBD**    5. Enter Source    6. Update Stage to **In-Process** and **Prospective**      1. **Lines tab**    1. Select Line(s) to be added to this policy.    2. Confirm accuracy of or update Status, Profit center, Line commission percent, and Line Estimated Premium and Commission.    3. Update the Issuing and Billing company to the **Issuing Company** and the **Premium Payable** carrier or broker listed on the Quote.    4. Review Billing, Servicing, Pr/Br Commissions tabs for accuracy or update as needed.    5. Repeat for each line where applicable. 2. Click MOVE 3. Update the Submission status to Completed and click FINISH.   A screenshot of a computer  Description automatically generated   1. **BND1** activity – add notes (including that this policy is not bound) and amend Follow-up/Start date to a future date to pend for receipt of policy and FINISH. |

#### **Create Invoice Request for Accounting**

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| 1. Highlight prospective policy. 2. Add applicable Accounting activity and notes (reference the accounting [Platform Activities Guide - Servicers](https://acrisure.sharepoint.com/:w:/s/ACR-ABSAccountingTeam/ESAdZgcBwPdJt0_n5-hNILkBueeqZpQWrGK6rg54rr9l7g?e=4LVSdM&clickparams=eyJBcHBOYW1lIjoiVGVhbXMtRGVza3RvcCIsIkFwcFZlcnNpb24iOiI0OS8yMzExMzAyODcyNCJ9&wdLOR=cC0B69E85-42BA-450A-8908-0E0D906D9928) for further details) |

### **Quote Accepted/Rejected**

#### **Quote Accepted**

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| 1. Highlight prospective policy, **ACTIONS > Change Policy Perspective/Contracted Status** and click YES.   A screenshot of a computer screen  Description automatically generated   1. Double-click to open the policy and go to Servicing/Billing    1. Policy – Update Policy #    2. Line – Confirm accuracy of Pr/Br Commissions 2. X to close the application. 3. Update the Stage to Submitted and FINISH.      1. Locate your accounting activity and re-assign to the invoicing team attaching supporting documentation as needed. |

#### **Quote Rejected**

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| 1. Highlight prospective policy, **ACTIONS > Issue/Not Issue Policy**    1. Update the Expiration date to match the Effective date.    2. Select Not Issue (repeat for all lines in a package policy)    3. Update Status to ZER    4. FINISH      1. Locate your accounting activity and re-assign to the invoicing team to reverse the transaction explaining the quote was not accepted. 2. Locate Expiring Policy (if applicable) and update status to X-N or X-R depending on status. |

## **Rewrite Policy Workflow**

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| **Best Practices**   * Review the upcoming renewal list 120days in advance * Remarket to carriers via [Auris/Tarmika](https://auris.acrisure.com/app/placement), online carrier portals, [Marketing Module Lite](#_JA.1_Marketing_Module) or [Marketing Module Full](#_JA.2_Marketing_Module_2) |

### **Remarket Policies:**

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| 1. If remarketing via [Auris/Tarmika](https://auris.acrisure.com/app/placement) or carrier portals, use one **QREW** for each carrier quoted, attach the quote, and document ICO, PPE, and Quoted Premium in activity detail. 2. If remarketing via [Marketing Module Lite](#_JA.1_Marketing_Module) or [Marketing Module Full](#_JA.2_Marketing_Module_2) for Carrier Submissions, a system-generated **SCAS** activity or a manually created **QREW** for each carrier will be utilized to attach the quote(s) and document ICO, PPE, and Quoted Premium in activity detail. 3. Close the **QREW/SCAS** as successful when bound. 4. Close the **QREW/SCAS as** unsuccessful if the carrier declined or the quote was not taken – add the reason from the dropdown. 5. Review all carrier quotes and send the proposal to the client; **PROP** Activity System-Generated 6. When bound on the carrier portal, renew the policy in Epic – From expiring: **ACTIONS> Renew. Or** 7. Email the Bind Request to the carrier and renew the policy in Epic—from expiring: **Actions>Renew** \*\***If a Download,** **see** [**Policy Received from Carrier**](#_Policy_Received_from_1) **Instructions.**  * Save sent email to **QREW/SCAS** activity.  1. System-generated **RPOL** activity (used to check in policy by Servicer 1) – If utilizing a Third Party/Workgroup – You have the option of closing the **RPOL** and opening a **CPCK** to assign to the appropriate workgroup 30 days after the effective date for the Policy document to be attached to both **CPCK** and **Policy;** checked and issued. **Or** 2. Move the Policy from Marketed to Current/Renewed; a **BND1** system-generated activity will populate. If utilizing a Third Party/Workgroup – You have the option of closing the **BND1** and opening a **CPCK** to assign to the appropriate workgroup 30 days after the effective date for the Policy document to be attached to both **CPCK** and **Policy;** checked and issued. 3. **CLRR** activity stays open until the Binder is received and attached, then close it as successful 4. Verify:    1. Policy Type    2. Policy number if known.    3. Effective/Expiration Date    4. Dept    5. Profit Center    6. ICO/PPE = **update to the new carrier** **–**[**select the correct ICO**](#_Select_the_Correct) **so the** [**correct PPE**](#_Select_the_Correct_1) **will default**    7. Use **REW** policy status. 5. Use the X in the navigation panel and select **Yes, perform action:** **Update Stage to Submitted** |

#### **Policy Received from Carrier**

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| **DOWNLOAD:**  **Policies rewritten from one carrier to a new carrier will use Actions > Copy Policy instead of Actions > Renew, and the expiring carrier renewal download will need to be canceled flat.**  **Copying the policy instead of renewing it will ensure that the Rewritten policy is downloaded correctly. Confirming that the expiring carrier renewal download is cancelled will remove the policy from the Expiration and Potentially Missed Renewal reports.**   1. Select **EXPIRING** policy term 2. Click **Actions > Copy Policy** 3. **Destination** – To current account 4. Verify **Structure** 5. **Policy Detail** 6. Description 7. Policy Number 8. Effective/Expiration Date 9. **Lines of Business** (if more than one line of business, each line needs to be updated) 10. Verify Line(s) of Business 11. Policy Status **REW – Rewrite** 12. Billing – **Agency** or **Direct** 13. Profit Center – Select from the dropdown 14. Issuing Company/Premium Payable 15. **Line Commission –** Enter carrier commission percentage if known  * **If Commission is Unknown –** * Check the box to use the commission agreement * Select the policy type with **Acrisure Estimated Rate** in the dropdown      1. Click **Detail** 2. Policy Opens - Click **Servicing/Billing > Line** on left Navigation Panel 3. **Servicing** tab – Verify required Servicing Contacts 4. **Pr/Br Commissions** tab – Verify Commission Agreement 5. Click the **X** on the left Navigation Panel to close out of Policy Detail 6. If the Policy has been submitted to the Carrier for binding – Close Policy Detail > **Update Stage to Submitted** 7. Click **Finish** 8. When the **Expiring** carrier has downloaded the renewal; proceed with one of the following options:  * Confirm for carrier Cancellation Download and update policy status to **CRW – Cancelled – Rewritten**   Follow the [Cancellation Workflow](#_Cancel_Policy_Workflow) to cancel the downloaded renewal flat. Policy status of **CRW – Cancelled – Rewritten** and utilize the **CREW** activity code if needed  **NON-DOWNLOAD:**   1. **RPOL/CPCK** - Policy Check for accuracy    1. When the policy is attached to the **RPOL/CPCK** Activity, **Mark it as an Important Policy Document** – this will automatically attach to the policy and activity.      * 1. If the Policy is inaccurate, leave **RPOL/CPCK** open for follow-up; send to carrier or account servicer for correction.   2. If the Policy is accurate, Issue policy – Actions>Issue/Not Issue Policy and close **RPOL/CPCK**.   3. The processor will create a note when policy checking is complete.   4. Click the **Close Activity tab**:  close **RPOL**/**CPCK** as successful.   **\*Send Welcome Letter to Client**  [Add Client to CSR24 Client Portal](#_JA.7_Attachment_Naming) (if applicable)  [Issue EPIC Auto ID Cards](#_Auto_ID_Cards)  [Issue Evidence of Property Insurance](#_Evidence_of_Property)  [Issue Certificate of Liability Insurance](#_Certificate_Processing_in)  [Platform Activities Guide - Servicers](https://acrisure.sharepoint.com/:w:/s/ACR-ABSAccountingTeam/ESAdZgcBwPdJt0_n5-hNILkBueeqZpQWrGK6rg54rr9l7g?e=4LVSdM&clickparams=eyJBcHBOYW1lIjoiVGVhbXMtRGVza3RvcCIsIkFwcFZlcnNpb24iOiI0OS8yMzExMzAyODcyNCJ9&wdLOR=cC0B69E85-42BA-450A-8908-0E0D906D9928) |

## **Policy Change Workflow**

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| **Best Practices**   * When endorsing a policy, the ***ACTIONS>Endorse/Revise Existing Line*** workflow is **required** to create a detailed service summary row and to ensure the endorsement download comes through properly. The below steps must be done **within 24 hours** of binding the endorsement with the carrier. |

### **Change Activities:**

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| Activity Code | Description |
| CHGE | System-generated activity created when utilizing Actions>Endorse/Revise – Existing lines on the Current/Renewed Policy screen for all other change requests except, internal, adding a line, or audits |
| CHGI | System-generated activity created when utilizing Actions>Endorse/Revise – Existing lines on Current/Renewed Policy screen for internal change/correction |
| CHGL | System-generated activity created when utilizing Actions>Endorse/Revise – Add Line Midterm on the Current/Renewed Policy screen to add a line to an existing policy |
| CHGA | System-generated activity created when utilizing Actions>Endorse/Revise – Existing lines on the Current/Renewed Policy screen for audits |

### **Process Change Request (Existing Line)**

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| 1. Receive policy change requests from the client, via email or phone. 2. In Epic – **ACTIONS > Endorse/Revise Existing Line;** enter:    1. Effective date of change    2. Description of change (this will flow into the Activity description)    3. Click **Detail**    4. **Activity = CHGE** *(This activity’s Follow-up/start date will be the current date)*    5. Add detailed notes on who called/emailed, what they asked for, your responses or directions, etc.    6. Reassign to a third party/processer/workgroup to follow up for endorsement. (if applicable)    7. Click Finish   **Downloaded policies**:   1. Process changes on the carrier website 2. Attach bind confirmation, emails with client/carrier, etc. to the **CHGE** activity. 3. Click the X in the left navigation pane to close out the policy detail. 4. Click **Yes Perform Action** > **Update Stage to Submitted**   **Non-Downloaded Policies:**   1. Update ACORD detail in Epic to include the change requested. 2. Prepare ACORD Change Request Form (if applicable) and/or email the change to the carrier.    1. Attach email/change request to the **CHGE** activity.    2. Leave Activity Open for follow-up. 3. Click the X on the left navigation pane to close out the policy detail. 4. Click Yes Perform Action > **Update Stage to Submitted** |

#### **Endorsement Received from Carrier**

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| **Downloaded Policies:**   * Review the daily download list and update missing information. * Reassign the **edoc** activity to a third party/workgroup (if applicable) to label and attach to the **CHGE** activity and verify what was requested is correct in the endorsement.   + When the Endorsement is attached to the **CHGE** Activity, **Mark as an Important Policy Document—**it will automatically attach to boththe policy and activity.      * + If the Endorsement is incorrect, the **CHGE** activity will remain open, and the third party/processor/workgroup will set the **CHGE** activity to Servicer 1 to send a request to the carrier for correction.   + Servicer 1 will then set **CHGE** Activity to third-party/processor/workgroup (if applicable) to follow up for revised endorsement ***30*** days from the current date.   + Third-party/processor/workgroup will add notes and close the **CHGE** activity as successful if the Endorsement was issued correctly. * Download will update the service summary row and **issue** the endorsement. * Update Line Premium & Commission per Endorsement.   **Non-Downloaded Policies:**   * Reassign the **CHGE** activity to a third party/processor/workgroup (if applicable) to verify what was requested is correct in the Endorsement.   + When the Endorsement is attached to the **CHGE** Activity, **Mark as an Important Policy Document—**it will automatically attach to boththe policy and activity.      * + If the Endorsement is incorrect, the **CHGE** activity will remain open, and the third party/processor/workgroup will set the **CHGE** activity to Servicer 1 to send a request to the carrier for correction.   + Servicer 1 will then set **CHGE** Activity to third-party/processor/workgroup (if applicable) to follow up for revised endorsement ***30*** days from the current date.   + Third-party/processor/workgroup will add notes and close the **CHGE** activity as successful if the Endorsement was issued correctly. * Update Line Premium & Commission per Endorsement. * From policy, **ACTIONS > Issue/Not Issue Endorsement** * Verify the effective date of change and other details. * Update Line Premium & Commission per Endorsement. * Issue   [Issue EPIC Auto ID Cards](#_Auto_ID_Cards)  [Issue Evidence of Property Insurance](#_Evidence_of_Property) or [Issue Certificate of Liability Insurance](#_Certificate_Processing_in)  [Platform Activities Guide - Servicers](https://acrisure.sharepoint.com/:w:/s/ACR-ABSAccountingTeam/ESAdZgcBwPdJt0_n5-hNILkBueeqZpQWrGK6rg54rr9l7g?e=4LVSdM&clickparams=eyJBcHBOYW1lIjoiVGVhbXMtRGVza3RvcCIsIkFwcFZlcnNpb24iOiI0OS8yMzExMzAyODcyNCJ9&wdLOR=cC0B69E85-42BA-450A-8908-0E0D906D9928) |

### **Process Change Request (Add Line Mid-Term)**

**Best Practices**

When endorsing a policy, the ***ACTIONS>Endorse/Revise Existing Line*** workflow is **required** to create a detailed service summary row and to ensure the endorsement download comes through properly. The below steps must be done **within 24 hours** of binding the endorsement with the carrier.

This process should only be followed if we are adding a Line of Business to a Package policy Mid-Term and the **policy number is the same.**

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| Activity Code | Description |
| CHGL | System-generated activity created when utilizing Actions>Endorse/Revise – Add Line Mid-Term on the Current/Renewed Policy screen |

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| 1. Receive a policy change request from a client, via email or phone. 2. In Epic – **ACTIONS > Endorse/Revise Add Line Mid-Term;** enter:    1. Effective date of change    2. Description of change    3. Click the **ADD** (+) button within the Line of Business section.    4. Add Line Code, Status, and Issuing Location    5. Verify Profit Center, ICO/PPE    6. Add Carrier Commission percentage if known (if unknown add 10%)    7. Click Detail    8. **Activity = CHGL**    9. Add detailed notes:  who called, what did they ask for, your responses and direction, etc.    10. Click **Finish** and set it to third-party/processor/workgroup to follow up for endorsement (if applicable)   **Downloaded Policies:**   1. Process the change on the carrier website. 2. Attach bind confirmation, emails with client/carrier, etc. to the **CHGL** activity. 3. Click the X on the left panel to close out the policy detail. 4. Click Yes Perform Action > **Update Stage to Submitted.**   **Non-Downloaded Policies:**   1. Update ACORD detail in Epic to include the line being added. 2. Prepare the ACORD Change Request Form (if applicable) and email it to the carrier.    1. Attach email/change request to the **CHGL** activity.    2. Leave Activity Open for follow-up. 3. Click the X on the left panel – **Update Stage to Submitted** |

#### **Endorsement Received from Carrier**

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| **Downloaded Policies:**   1. Reassign the **edoc** activity to a third party/processor/workgroup (if applicable) to label and attach to the **CHGL** activity and verify what was requested is correct in the endorsement.    1. When the Endorsement is attached to the **CHGE** Activity, **Mark as an Important Policy Document—**it will automatically attach to boththe policy and activity.      * 1. If the Endorsement is incorrect, the **CHGE** activity will remain open, and the third party/processor/workgroup will set the **CHGE** activity to Servicer 1 to send a request to the carrier for correction.   2. Servicer 1 will then set **CHGE** Activity to third-party/processor/workgroup (if applicable) to follow up for revised endorsement ***30*** days from the current date.   3. Third-party/processor/workgroup will add notes and close the **CHGE** activity as successful if the Endorsement was issued correctly.  1. Download will update the service summary row and **issue** the endorsement. 2. Update Line Premium & Commission per Endorsement.   **Non-Downloaded Policies:**   1. Reassign the **CHGL** activity to a third party/processor/workgroup (if applicable) to verify what was requested is correct in the Endorsement.    1. When the Endorsement is attached to the **CHGE** Activity, **Mark as an Important Policy Document—**it will automatically attach to boththe policy and activity.      * 1. If the Endorsement is incorrect, the **CHGE** activity will remain open, and the third party/processor/workgroup will set the **CHGE** activity to Servicer 1 to send a request to the carrier for correction.   2. Servicer 1 will then set **CHGE** Activity to third-party/processor/workgroup (if applicable) to follow up for revised endorsement ***30*** days from the current date.   3. Third-party/processor/workgroup will add notes and close the **CHGE** activity as successful if the Endorsement was issued correctly.  1. Update Line Premium & Commission per Endorsement. 2. From policy, **ACTIONS > Issue/Not Issue Endorsement** 3. Verify the effective date of change and other details. 4. Issue   **Issue Proofs:**   1. [Auto ID Card](#_EPIC_Auto_ID) 2. [Evidence of Property](#_EPIC_Evidence_of) 3. [Platform Activities Guide - Servicers](https://acrisure.sharepoint.com/:w:/s/ACR-ABSAccountingTeam/ESAdZgcBwPdJt0_n5-hNILkBueeqZpQWrGK6rg54rr9l7g?e=4LVSdM&clickparams=eyJBcHBOYW1lIjoiVGVhbXMtRGVza3RvcCIsIkFwcFZlcnNpb24iOiI0OS8yMzExMzAyODcyNCJ9&wdLOR=cC0B69E85-42BA-450A-8908-0E0D906D9928) |

### **Change Policy Dates**

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| 1. Select Policy 2. **ACTIONS** > Change Effective/Expiration Dates 3. Enter new dates (Note: Service Summary Row Dates may need to be updated as well)   A screenshot of a computer  Description automatically generated   1. Activity **CEED** - Change to Closed if no follow-up needed Close – Successful; if Endorsing with the carrier please move to step 5 to update Service Summary Row. 2. In Epic – **ACTIONS > Endorse/Revise Existing Line;** enter:    * Effective date of change    * Description of change (this will flow into the Activity description)    * Details    * **Activity = CHGE** *(This activity will have an automatic Follow-up/start date of 30 days from the current date) (Update to current date if 3rd party is processing change)*    * Add detailed notes for change    * Click Finish and set it to third-party/processor/workgroup to follow up for endorsement.   **Downloaded Policies:**   * Process changes on the carrier website * Attach bind confirmation, emails with client/carrier, etc. to the **CHGE** activity and leave it open for follow-up. * Click the X on the left navigation pane to close out the policy detail. * Click Yes Perform Action > **Update Stage to Submitted**   **Non-Downloaded Policies:**   1. Prepare ACORD Change Request Form (if applicable) and/or email the change to the carrier.    1. Attach email/change request to the **CHGE** activity.    2. Leave Activity Open for follow-up. 2. Click the X on the left navigation pane to close out the policy detail. 3. Click Yes Perform Action > **Update Stage to Submitted** |

#### **Endorsement Received from Carrier**

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| **Downloaded Policies:**   * Review the daily download list and update missing information. * Reassign the **edoc** & **CHGE** activities to a third party/processor/workgroup to label and attach to the **CHGE** activity and verify what was requested is correct in the Endorsement.   1. When the Endorsement is attached to the **CHGE** Activity, **Mark as an Important Policy Document—**it will automatically attach to boththe policy and activity.      * 1. If the Endorsement is incorrect, the **CHGE** activity will remain open, and the third party/processor/workgroup will set the **CHGE** activity to Servicer 1 to send a request to the carrier for correction.   2. Servicer 1 will then set **CHGE** Activity to third-party/processor/workgroup (if applicable) to follow up for revised endorsement ***30*** days from the current date.   3. Third-party/processor/workgroup will add notes and close the **CHGE** activity as successful if the Endorsement was issued correctly. * Download will update the service summary row and **issue** the endorsement. * Update the Line Premium & Commission per Endorsement * Attach policy endorsement to the **Policy**   **Non-Downloaded Policies:**   * Reassign the **CHGE** activity to a third party/processor/workgroup to verify what was requested is correct in the Endorsement.   1. When the Endorsement is attached to the **CHGE** Activity, **Mark as an Important Policy Document—**it will automatically attach to boththe policy and activity.      * 1. If the Endorsement is incorrect, the **CHGE** activity will remain open, and the third party/processor/workgroup will set the **CHGE** activity to Servicer 1 to send a request to the carrier for correction.   2. Servicer 1 will then set **CHGE** Activity to third-party/processor/workgroup (if applicable) to follow up for revised endorsement ***30*** days from the current date.   3. Third-party/processor/workgroup will add notes and close the **CHGE** activity as successful if the Endorsement was issued correctly. * Attach policy endorsement to the **Policy**. * From policy, **ACTIONS > Issue/Not Issue Endorsement** * Verify the effective date of change and other details. * Update Line Premium & Commission per Endorsement * Issue   **Issue Proofs:**   * [Auto ID Card](#_Auto_ID_Cards) * [Evidence of Property](#_Evidence_of_Property) * [Certificate of Insurance](#_Certificate_Processing_in)   **Agency Billing:** Follow theAccounting Activityworkflows found in the Accounting Guide |

### **Process Audit**

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| |  |  | | --- | --- | | Activity Code | Description | | CHGA | System-generated activity created when utilizing Actions>Endorse/Revise – Existing lines on the Current/Renewed Policy screen for audits | | CAU1 | Audit (Line of Business) Eff xx-xx-xxxx | | XADD | eDoc Audit Dispute | | XADE | eDoc Estimated Audit | | XADF | eDoc Deferred Audit | | XADJ | eDoc Audit Initiated | | XADO | eDoc Outstanding Premium Audit | | XADU | eDoc Uncollectable Audit | | XADW | eDoc Waive Audit | | XAPC | eDoc Notice of Exposure change on Policy due to recent Audit |   **Non-Download Policies**   1. Receive policy audit from carrier. 2. Navigate to the Policies Tab and locate the expired term by changing the policies’ view to Expired/History.      1. From policy line – **ACTIONS > Endorse/Revise Existing Line;** enter:      * 1. Effective date should be the effective date of the policy term.   2. Update Description to say Audit and the resulting AP or RP   3. Click Detail      * 1. **Activity = CHGA**      1. Update policy exposures and estimated premiums to reflect the Audit results. 2. For Work Comp Final Audits navigate to locations and update the SIC & NAICS, estimate annual renumeration/payroll, double check the Rate, and click the blue hyperlink Calculate for every class code included in Audit.      1. For General Liability Final Audits – navigate to General Liability – Hazards and update the schedule of Hazards with updated Exposure, Rate & Premium.      1. Go to Servicing/Billing – Line in the Left navigation panel and update Estimated Premium per Audit.      1. Click on X in the Left Navigation Panel and whenthe **In Process Policy** box populates choose **Yes, perform action: Issue/Not Issue Endorsement** and click Finish. \*\*Issue/Not Issue Endorsement box will populate, click Finish.        1. Attach policy audit to the **CHGA** Activity and add notes including A/P or R/P  * Utilize the following naming convention when attaching Final Audit: * YY-YY (Line of Business) Audit, Carrier, AP/RP, i.e. 22-23 General Liability Final Audit Additional/Return Premium $35,827 * Utilize the following folder structure when attaching Final Audit: * Main Folder = Property & Casualty * Sub Folder 1 = Policies * Sub Folder 1 = Workers Compensation or Liability depending on the type of Audit * Under Client Access click the box next to Client accessible      1. Deliver the Audit to the client via the preferred method. Note the **CHGA** activity with the delivery detail.   **If Agency Bill Return Premium:**   * Create $IN1 activity for the invoicing team. * Create a $CRR activity with instructions for how the funds should be managed when received. * Return to Insured or; * Send to Finance Company or; * Hold funds on account.   **Downloaded policy Audits**:   1. Manually create **CAU1** Activity By clicking New>Activity or F9 and attach Policy audit from the carrier. 2. Review the daily download list to update any missing information. 3. Update the Service Summary Row to reflect the Audit and the AP or RP as indicated. **ACTIONS > Change the Service Summary Description** to show Audit and the AP or RP.      1. Deliver the audit to the client via the preferred method. Note the **CAU1** activity with the delivery details. |
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#### **Audit Dispute**

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| If a client requests to dispute the audit.   1. Reopen the closed **CHGA**/**CAU1 activity**. Document all correspondence with the client, carrier, broker, etc. Maintain the activity throughout the dispute process. 2. If it is an agency-billed audit, confirm the billing status with the carrier/broker. If need be, refer to the above accounting workflows to determine the next steps for transactions. 3. If a dispute results in another audit being issued, close the reopened **CHGA/CAU1** and Repeat the Process Audit steps |

## **[Cancel Policy Workflow](#_Cancel_Policy_Workflow)**

### **Best Practices**

### **When canceling a policy, the Best Practice is to obtain a signed LPR for all policies affected.**

### **Cancelation Activities**

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| Activity Code | Description |
| CPOL | System-generated activity created when utilizing Actions>Cancel on the Current/Renewed policy screen per insured request |
| CREW | System-generated activity created when utilizing Actions>Cancel on the Current/Renewed policy screen when rewriting to a new carrier |
| CCN1 | Manually created activity utilized when a Notice of Cancellation, Notice of Non-Renewal or Conditional Renewal is received from a carrier for any other reason except Non-Payment of Premium |
| CCN2 | Manually created activity utilized when a Notice of Cancellation received from a carrier due to Non-Payment of Premium |
| REIN | System-generated activity created when utilizing Actions>Reinstate on the Current/Renewed policy screen |
| ZCAN | Policy Cancellation Downloaded |
| ZNON | Policy Non-Renewal Downloaded |
| ZREI | Policy Reinstatement Downloaded |
| ZRNR | Reversal of Policy Non-Renewal Downloaded |
| XCRN | eDoc Conditional Renewal Notification |
| XREI | eDoc Reinstatement |
| XRNR | eDoc Reversal of Non-Renewal |
| XRWX | eDoc Non-Renewal |
| XXLC | eDoc Cancellation Confirmation |
| XXLN | eDoc Cancellation Request |
| XXLP | eDoc Cancellation Pending |

### **Cancel Monoline Policy**

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| * Locate Account * Select Policy * **ACTIONS > Cancel** * Select Policy Release or Cancellation request. * Enter the Effective Date of Cancellation * Enter a description. * Click DETAIL * Choose Activity - **CREW** if you are rewriting to another carrier midterm or flat canceling an automatic renewal rewritten with another carrier <or> **CPOL** for all other reasons.   **CPOL-** Leave open until cancellation endorsement/invoice is received. Close activity as unsuccessful and provide a reason.  **CREW –** For midterm rewrites, leave it open until cancellation endorsement/invoice is received, then close activity as successful. If flat cancelling an automatic renewal, close activity as successful   * From the left panel, enter Reason/Method, Additional Interest and Remarks (as applicable)      * X out of Policy (from the left navigation panel) * To generate the Lost Policy Release, click **PRINT > Cancellation** within the blue options bar**.** * Click the Distribution tab Select **Attach without Distributing** as the delivery method, click Finish. * Go to Attachments, locate LPR click Actions> **Edit Attachment Detail** to manually attach to the **CPOL/CREW** activity and update description per **Naming Conventions** then click **Finish.** * From Attachments, right-click on the LPR and select **Send to eSignature.** * Follow [JA.7 DocuSign Integration](#_JA.7_DocuSign_Integration) |

### **Signed LPR Received:**

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| 1. DocuSign will send a verification email confirming the LPR was signed and will automatically attach the signed LPR to the **CPOL/CREW** & **ESIG** Activities as an attachment. If the Certificate of Authentication is required, it can be dragged and dropped from the Email received from DocuSign. 2. Add notes to the **CPOL** or **CREW** Activity 3. **Option 1: Submit Cancellation request through Carrier Website**     * Enter cancellation on the carrier website.    * Select Policy and **ACTIONS** > **Update Stage to Submitted**—Click Finish   **Option 2: Submit Cancellation through Epic**   * + Select the signed LPR from the attachments.   + Right-click and **Send Via Email** to the carrier.   + Select the policy to be canceled; then click **ACTIONS > Update Stage to Submitted**  1. Add notes to the **CPOL** or **CREW** activity. |

### **Cancellation Confirmation Received from Carrier:**

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| **Download:**   * Attach Cancellation Confirmation to the **CPOL/CREW** activity—update the description and select the folder. * Will update the service summary stage to **Cancelled.** * Verify policy status: click Servicing/Billing > Line from the left navigation panel and verify/update the **policy status to Cancelled – CRN/CRR** (select based on original status) or **CRW** if rewritten. * Close the **CPOL** activity as **Unsuccessful** and select the reason; click Finish.   **Non-Download:**   * Attach Cancellation Confirmation to the **Activity**—update the description and select folder. * Select Policy then **ACTIONS** > **Issue Cancellation** – verify details. * The Status Description will auto-default to **CRN/CRR** depending on the status of the policy canceled. If the policy was rewritten, manually update the status description to **CRW.**      * Click Finish * Double Click on policy * In the left panel, click **Servicing/Billing > Line** and update “Line ID” with reason for cancellation (see below)      * Click the **Close Open Activity tab** and close the **CPOL** activity as **Unsuccessful** and select reason; add notes; click Finish.   + **OR** if the policy was rewritten, close the **CREW** activity as Successful add notes, and click Finish.   + Update policy status to **CRW.**   **If Agency Bill Return Premium:**   * Create $IN1 activity for the invoicing team. * Create a $CRR activity with instructions on how to manage the funds when they are received.   + Return to Insured   + Send to Finance Company   + Hold funds on account |

### **Cancel a Policy Line from a Package Mid-Term**

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| 1. From the Client’s account, click **Policies** from the left navigation panel. 2. Select the policy line to be canceled; click **ACTIONS > Cancel.** 3. Select Policy Release or Cancellation Request. 4. Enter the Effective Date of cancellation. 5. Enter a description as to why canceling. 6. **Uncheck all lines NOT being canceled** and **check only the line which IS being canceled.** 7. Click **DETAIL**      1. Select **CPOL Activity** - change the Description to reflect only the one line in the package policy being canceled.    1. Activity = Open for follow-up on receipt of cancel confirmation/endorsement from the carrier    2. Add notes as to why canceling.    3. Click **FINISH** 2. From the left panel, enter Reason/Method, Additional Interest, and Remarks (as applicable)      1. X out of Policy (from the left navigation panel)   11. To generate the Lost Policy Release form, click PRINT > Cancellation  12. Select Attach without Distributing  13. Go to Attachments, locate LPR click Actions> **Edit Attachment Detail** to manually attach to the **CPOL/CREW** activity and update description per **Naming Conventions** then click **Finish.**  **14.** From Attachments, right-click on the LPR and select **Send to eSignature.**  15. Follow the [DocuSign workflow](#_JA.7_DocuSign_Integration)  16. Send signed LPR to the carrier.  **Option 1: Submit Cancellation request through Carrier Website**   * 1. Enter cancellation on the carrier website.   2. Select Policy and **ACTIONS** > **Update Stage to Submitted**—Click Finish   **Option 2: Submit Cancellation through Epic**   * 1. Select the signed LPR from the attachments.   2. Right-click and **Send Via Email** to the carrier.   3. Highlight the policy in question; then click **ACTIONS > Update Stage to Submitted**   4. Add notes to the **CPOL** or **CREW** activity |

### **Cancel Confirmation Received from Carrier:**

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| **Download:**   * Attach Cancellation Confirmation to the **CPOL/CREW** activity—update the description and select the folder. * Will update the service summary stage to **Cancelled.** * Verify policy status: click Servicing/Billing > Line from the left navigation panel and verify/update the **policy status to Cancelled – CRN/CRR** (select based on original status) or **CRW** if rewritten. * Close the **CPOL** activity as **Unsuccessful** and select the reason; click Finish.   **Non-Download:**   * Attach Cancellation Confirmation to the **CPOL/CREW activity** —update the description and select folder. * Select Policy then **ACTIONS** > **Issue Cancellation** – verify details. * The Status Description will auto-default to **CRN/CRR** depending on the status of the policy canceled. If the policy was rewritten manually update the status description to **CRW.**      * Click Finish * Double Click on policy * In the left panel, click **Servicing/Billing > Line** and update “Line ID” with reason for cancellation (see below)      * Click the **Close Open Activity** tab and close the **CPOL** activity as **Unsuccessful** and select reason; add notes; click Finish.   + **OR** if the policy was rewritten, close the **CREW** activity as Successful add notes, and click Finish.   + Update policy status to **CRW.**   **If Agency Bill Return Premium:**   * Create $IN1 activity for the invoicing team. * Create a $CRR activity with instructions on how to manage the funds when they are received. * Return to Insured * Send to Finance Company * Hold funds on account |

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| **\*Important Notes:**   * **The Cancellation status will only show on the Service Summary Line of the policy to be canceled. All other lines will show N/A because the change/cancellation did not affect the other package lines.** * **The expiration date will change only for the line of business for which the cancellation was requested. The policy expiration date will not change.** * **ON RENEWAL, remember to uncheck the canceled line so it will not be included in the package policy renewal term.** |

### **Cancel Policy for BOR Midterm**

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| 1. Locate Account 2. Select Policy  * **ACTIONS > Cancel** * Select Policy Release or Cancellation request. * Enter the Effective Date of Cancellation * Enter a description. * Click DETAIL * Activity: **CPOL-** attach **BOR,** Add notes (who, what, where, when how) * Click Finish * From the left panel, enter Reason/Method, Additional Interest, and Remarks as needed.      * X out of Policy (from the left navigation panel) * Select Policy > ACTIONS > Issue Cancellation * The Status Description will auto-default to **CRN/CRR** depending on the status of the policy canceled.      * Click Finish * Double Click on policy * In the left panel, click **Servicing/Billing > Line** and update “Line ID” with reason for cancellation (Lost to BOR) * Close **CPOL** activity as Unsuccessful, choose Lost reason and click Finish. |

### **Cancellation Confirmation/BOR Received from Carrier Download Vs. Non-Download:**

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| **Download:**   * Attach Cancellation Confirmation/BOR to the **CPOL/CREW** activity—update the description and select the folder. * Will update the service summary stage to **Cancelled.** * Verify policy status: click Servicing/Billing > Line from the left navigation panel and verify/update the **policy status to Cancelled – CRN/CRR** (select based on original status). * Close the **CPOL** activity as **Unsuccessful** and select the reason; click Finish.     **Non-Download:**   * Attach Cancellation Confirmation/BOR to the **CPOL/CREW** activity—update the description and select the folder. * Select Policy then **ACTIONS** > **Issue Cancellation** – verify details. * **The policy status will automatically update to Cancelled – CRN or CRR** (based on original status) only for the line being canceled.      * Click the **Close Open Activity** tab and close the **CPOL** activity as **Unsuccessful** and select reason; add notes; click Finish. |

### **Notice of Cancellation for Non-Payment**

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| **Notice of Cancellation for Non-Payment Received**   * When NOC for Non-Payment is received, go to the Policies area in the Client’s account. * Click Policies in the left navigation pane. * Highlight the policy in question from the policy list view. * Click the **NEW** button in the top blue options bar and select Activity (or press F9) * Select the **CCN2** activity.      * Follow the Tasks that populate: * 1. If NOC is rec’d less than 7 business days before cancellation * 2. Confirm Mailing address * 3. Check for payment/reinstatement notice * Update the Follow-up/Start date to the Date of Cancellation * Add Notes * Click Detail * Drag and Drop the Pending Cancel notice into this activity. * Update the Attach To description following your Platform’s document [naming conventions](#_JA.7_Attachment_Naming)      * Click **Finish** * Follow the appropriate steps below based on whether the client did or did not make payment.   1. If a client makes payment by the due date, drag & drop the carrier Rescind Notice to the open CCN2 activity on the Home Base. Update the description according to the Platform’s [naming conventions](#_***JA.7_Attachment_Naming). Add to the folder as needed.      + Right-click on the activity and select Close.      + Mark as **Successful**      + Add Final note (i.e., Payment received – cancel notice rescinded)      + Click FINISH   2. If a client does not make payment by the due date, drag & drop the carrier Final Cancel Notice to the open CCN2 activity on the Home Base. Update the description according to the Platform’s [naming conventions.](#_JA.7_Attachment_Naming)  Add to Cancellation folder as needed.      + Locate Account – Select Policy -- **ACTIONS > Cancel**      + Select Policy Release—Enter the Effective date of Cancellation and description      + Click Finish      + Activity: **CPOL-** Add notes (who, what, where, when how)      + Select Policy then **ACTIONS** > **Issue Cancellation** – verify details.      + The Status Description will auto-default to **CRN/CRR** depending on the status of the policy canceled.      * + Click Finish and double-click on the policy   + In the left panel, click **Servicing/Billing > Line** and update “Line ID” with reason for cancellation (see below)      * + Click the **Close Open Activity** tab and close the **CPOL** activity as **Unsuccessful** and select reason; add notes; click Finish.   **If Agency Bill Return Premium:**   * Create $IN1 activity for the invoicing team * Create a $CRR activity with instructions on how to manage the funds when they are received * Return to Insured * Send to Finance Company * Hold funds on account |

### **Notice of Cancellation from Carrier**

**Notice of Cancellation for any reason other than Non-Payment I.E. N*on-compliance for Audit, Loss control requirements, Underwriting, Inspection:***

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| * When NOC is received, go to the Policies area in the Client’s account. * Click Policies in the left panel. * Highlight the policy in question from the policy list view. * Click the **NEW** button in the top blue options bar and select Activity (or press F9) * Select the **CCN1** activity.      * Label the activity as follows:  1. YY-YY Line of Business Cancellation Eff MM-DD-YY, Reason  * Click on Save & Go to Detail * Code the **CCN1** Activity to Servicer 1 and leave the Follow-up/Start date to the same day as entered in the system. * Drag and Drop the Pending Cancel notice into this activity and label the Document as follows:   1. YY-YY Line of Business Cancellation Eff MM-DD-YY, Reason * Add Notes and Click Finish * Follow the appropriate steps below based on whether the client did or did not provide the requirements.   1. If a rescission notice is received, drag & drop to the open **CCN2** activity on the Home Base. Update the description according to the Platform’s [naming conventions](#_JA.9_Attachment_Naming). Add to the folder as needed.      + Right-click on the activity and select Close.      + Mark as **Successful**      + Add Final note (i.e., Payment received – cancel notice rescinded)      + Click **FINISH**   2. If the final cancelation notice is received, drag & drop to the open **CCN2** activity on the Home Base. Update the description according to the Platform’s [naming conventions.](#_JA.9_Attachment_Naming)  Add to Cancellation folder as needed.      + Locate Account – Select Policy -- **ACTIONS > Cancel**      + Select Policy Release—Enter the Effective date of Cancellation and description      + Click Finish      + Activity: **CPOL-** Add notes (who, what, where, when how)      + Select Policy then **ACTIONS** > **Issue Cancellation** – verify details.      + The Status Description will auto-default to **CRN/CRR** depending on the status of the policy canceled.      * + - * Click Finish       * Double Click on policy       * In the left panel, click **Servicing/Billing > Line** and update “Line ID” with reason for cancellation (see below)      * + Click the **Close Open Activity** tab and close the **CPOL** activity as **Unsuccessful** and select reason; add notes; click Finish.   **If Agency Bill Return Premium:**   * Create $IN1 activity for the invoicing team * Create a $CRR activity with instructions on how to manage the funds when they are received * Return to Insured * Send to Finance Company * Hold funds on account |

## **Policy Not Renewed Workflow**

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| **If a policy non-renews at expiration and is not rewritten with our Agency…Examples below:**   1. **Insured calls/emails and states that he/she will not renew with our agency.** 2. **Non-renewal received from a carrier, and we are unsuccessful in rewriting with another carrier.** |

### **Mark Policy as Not Renewed**

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| * Create **GNRN** activity & set Follow up/Start Date to expiration date of policy.   + Add notes as to why the policy was not renewed. * When **GNRN** appears on Follow up/Start Date go to the Policy screen and double click the policy which is not renewing * In the left panel, click **Servicing/Billing > Line.** * **Update the policy status:** (Select based on original policy status)   + **NRN** (Not-Renewed NEW) – The Policy was a new business.   + **NRR** (Not Renewed REN) - The policy was a renewal. * Add note to Line ID: Example: No response from the client.      * Click the X on the left panel. * Click Finish * Close **GNRN** Activity as **Unsuccessful – Lost – Reason** |

## **Policy Not Renewed for BOR**

### **Mark Policy as Not Renewed**

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| * Create **GNRN** activity & set Follow up/Start Date to the expiration date of the policy.   + Add notes as to why the policy was not renewed. * When GNRN appears on Follow up/Start Date go to the Policy screen and double click the policy which is not renewing * In the left navigation pane, click **Servicing/Billing > Line.** * **Update the policy status to NRN (Not-Renewed NEW) or NRR** **(Not Renewed REN)**   (Select based on original policy status)   * 1. Add a note to Line ID: Example: Lost to BOR. * Click the X on the left navigation pane. * With the policy highlighted, press F9 (or click **NEW > Activity**) and select the **GNRN** Activity   + Add notes as to why the policy was not renewed.   + Mark as Closed – Unsuccessful; select reason Lost - **BOR**   + Click Finish |

## **Policy Reinstated Workflow**

### **Reinstate Policy**

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## **Claims Workflow**

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| **(Future State) If referring Claims to the Platform Centralized Claims Department:**   * Highlight the policy * Click NEW Activity (or F9) and select **CCRF** * Assign to Claims Team for handling (Who/Owner = CLM Work Group) * Add notes regarding conversation with client; leave open, click Finish |

### **Add New Claim**

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| 1. Locate Account 2. Click **NEW** Claim    * When receiving **claims download**, enter data in required fields only. Download will populate claims details.    * If **NOT receiving claims download**, manually enter all details. 3. Click **Detail** 4. **ACLM** Activity – leave open for follow-up.    * Add notes (who, what, where, when, how, why, etc.) - Click **Finish.** 5. Click all screens in the Navigation Panel to enter claim details 6. Click the X in the left panel to close out the claim detail 7. Attach PDF documents, pictures, and correspondence from the Insured to the **ACLM** activity. 8. To **issue a Loss Notice**, highlight the claim; click **ACTIONS > Issue Loss Notice**      * To add pertinent pdf’s or pictures; click Forms/Attachments and Add button * Choose Existing client document and click Continue      * Locate the pictures/documents, check box, and click Finish. * Added pictures/documents will populate under the Loss Notice      * Click the Distribution tab * Select Contact (use the lookup button to locate) * Select Via (Print, Email) and enter additional details * Click Finish  1. From Attachments right-click Loss Notice to Edit Attachment Detail and add to the **ACLM** Activity 2. Repeat with the Email sent from the Distribution Manager. |

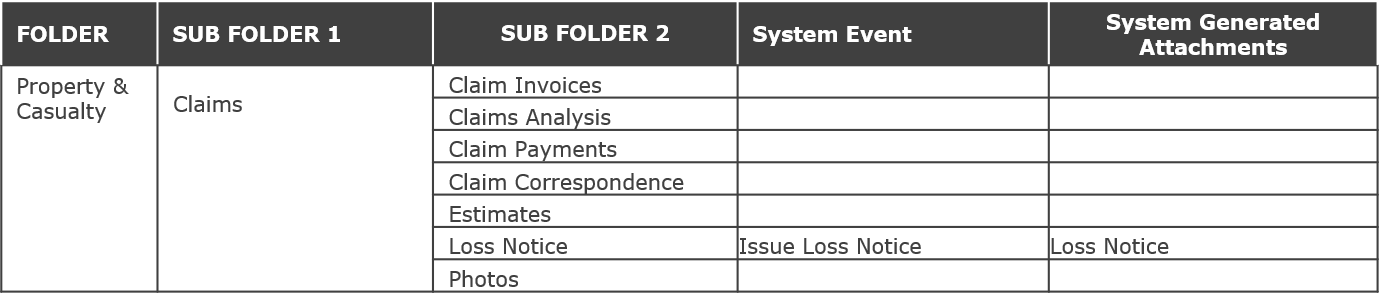
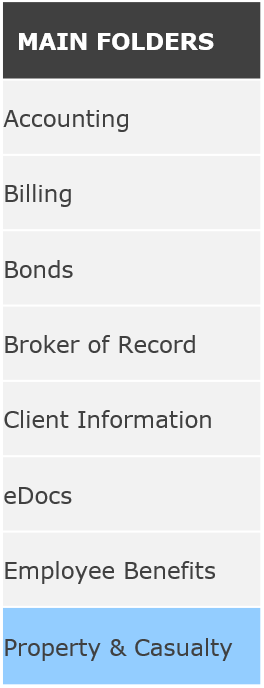
### **Claim Updates**

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| 1. Double-click the Claim to open the left panel 2. Click the section to be updated (i.e., Claim Payments, Update Reserves, Enter Subrogation or Litigation Detail, etc.) 3. Click the X in the left panel to close out the claim detail 4. To add notes to the **ACLM** Activity:    * Click once on the claim from the list view    * Click **ACCESS > Activity – Open Activities**    * Add notes, Click Finish |

### **Close Claim in Epic when Claim closed by Carrier**

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| 1. Select Claim 2. Click **ACTIONS > Close Claim**; add close date, and click Finish 3. With the claim highlighted, click **ACCESS > Activity – Open Activities**    * Select the open **ACLM** Activity    * Add notes    * Mark as Closed – Successful and Click Finish. |

### **Add Attachment**



## **Client Contracts/Services Workflow**

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| **\*\*This area allows the recording of fee-based agreements. These are used for Service/Consulting Agreements and fees in Lieu of Commission Agreements.**   1. Locate Client's Account 2. On the left Navigation Pane, click Client Contracts 3. Click Services 4. Click the **ADD** button. 5. Select a **Service Code** from the dropdown menu that best represents the service provided.  * Many codes will have 2 options, one for an annual fee and one for a one-time fee.  |  |  |  |  | | --- | --- | --- | --- | | **CODE** | **DESCRIPTION** | **DEPARTMENT** | **PROFIT CENTER** | | \*FLC | CL Fee in Lieu of Commission | Match Policy | Match Policy | | HCSA | Compliance Services - Annual | SRV | CHS | | HCSP | Compliance Services - Project (NR) | SRV | CHS | | HHRA | HR Services - Annual | SRV | CHS | | HHRP | HR Services - Project Specific | SRV | CHS | | RCMP | Certificate Management Services - Project (NR) | SRV | RMG | | RCMA | Certificate Management Services - Annual | SRV | RMG | | RSSA | Safety Services & Consulting - Annual | SRV | RMG | | RCTA | Contract Review - Annual | SRV | RMG | | RPCA | P&C Insurance Coverage Analysis (NR) | SRV | RMG | | RCLP | Claim Services & Consulting - Project (NR) | SRV | RMG | | RCLA | Claim Services & Consulting - Annual | SRV | RMG | | RCTP | Contract Review - Project (NR) | SRV | RMG | | RFZ1 | Flood Zone Correction (NR) | SRV | RMG | | RRMA | Risk Management - Annual | SRV | RMG | | RRMP | Risk Management - Project (NR) | SRV | RMG | | RSSP | Safety Services & Consulting - Project (NR) | SRV | RMG | | RTSP | Technology Solutions - Project (NR) | SRV | RMG |  1. Enter the Contract number, if applicable  ***NOTE: When adding a New Service and including billable fees if there isn’t a policy association, be sure to add #NEW in the Contract Number field. At renewal remove.*** 2. Enter the Description of the Service provided. 3. Enter the term of service from the dropdown menu and the inception and expiration dates.  * The inception and Expiration date should match what is on the fee agreement signed by the client. * If there isn’t an expiration date, use the month and day of the inception and make the year 9999. * If a single event, the Term should be Other, and the inception and expiration date should be the date the service will be performed.  1. **Be sure to enter the correct Agency/Branch, Department, and profit Center** 2. Click DETAIL 3. **ADSC** Activity defaults    * Verify Who/Owner    * Defaults as Closed, but mark as Open if follow-up is needed and verify follow-up/start date.    * Add Notes 4. Add Type of Fee (Flat or Hourly) 5. Enter contracted fee / contracted hours as needed. 6. Click the **Association** tab: Click ADD to associate this service with existing client policy(ies) 7. Click the **Itemizations** tab: Click ADD   - Enter the description of the service  - Name of the person who provided the service  - Account Contact  - Mileage (if applicable)  - Hours of service provided  - Hourly rate  - Calculate total   1. Click the Servicing Tab:  * Enter Contract Producer & Contract Servicer  1. Click the PR/BR Commissions Tab:    * Click ADD if someone should receive a commission on the service fee and enter their percentage of commission and production credit. 2. Click Attachments from the Navigation Panel and click the **ADD** button to add any attachments associated with the service (i.e., Service Contract, etc.) 3. When finished, close the Service from the left Navigation Pane. 4. Create an [Accounting](#_RMS_Workflow_Manual) Activity that corresponds with the Client Contract/Service  * Highlight Service>Click F9 to add Manual Activity * Attach the signed fee agreement for INVO team to provide the invoice.  1. Once a Service Contract is expired, close the contract – **Actions>Close Service.** |

# JOB AIDS

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## **JA.1 Marketing Module Lite (New or Renewal Business) QNEW/QREW PER EACH CARRIER**

### **Add Master Marketing Submission**

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| 1. Click the **Policies** area from the left Navigation Panel of the Client’s account. 2. Change policy view from **Current** to **Marketed**      1. Click the **ADD** button (+) 2. Enter a name for the Submission (Name: 24-25 Master Submission) 3. Enter the required information (Source, Department & type of business)   A screenshot of a computer  Description automatically generated   1. Add policies to the submission by clicking the **ADD** button under Policies to Market 2. **Add New Line**—Create new policy(ies) for marketing or, 3. **Add Existing Line** – Marketing existing lines. Check all policies going out to market. ***Include ALL lines of business going out to market.*** 4. Click **DETAIL** 5. The **AMMK** Activity will auto-set to Closed as Successful; click Finish. 6. Click the **ATTACHMENTS** Tab and drag & drop or click the (+) to add existing Client Documents or browse your files outside of Epic for attachments to be included in the submission. A screenshot of a computer     Description automatically generated   A screenshot of a computer  Description automatically generated   1. Enter/update policy details by clicking each line in the navigation panel and completing/updating each of the screens to fill in details in the ACORD apps (be sure to add detail to the Commercial AP/ACORD 125 first) 2. When finished, close Submission from the navigation panel (X) |

### **Add QNEW (New Business) or QREW (Renewal) Activity for each carrier**

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| 1. From the **Policies Marketed** list view, highlight the Master Submission 2. Click the **NEW** button at the top in the blue bar; select **Activity** (or press F9) 3. Click **Continue** 4. Code = **QNEW or QREW** 5. Description = Add Carrier name and Estimated Premium 6. Add the **Premium Payable** code in the **Detail area.** 7. Leave OPEN; add notes. 8. Click **Finish** 9. Repeat Steps 1-8 for **each** carrier.   A screenshot of a computer  Description automatically generated |

### **Applications to Carriers**

#### **Save & Submit ACORD Applications**

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| 1. Right-click on the Master Marketing Submission created above. 2. Select **Review Application** 3. Select the “Master Marketing Submission” radio button; click **Continue.** 4. Click the **Organization Contact** tab and verify/update the agency address. 5. Click the **Distribution** tab. 6. Under **Delivery Options** select **“Attach Without Distributing”** 7. Click **Finish** 8. With the submission highlighted, click **ACCESS >** **Attachments**, **right-click** on the ACORD, and select **Send Via Email** if emailing to the underwriter. 9. If quoting online, add notes to the specific carrier’s Open **QNEW** or **QREW** Activity. |

#### **Attach quote-related documents to QNEW/QREW**

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| 1. Drag & drop onto the **QNEW or QREW** activity all emails, documents, applications, etc. to the specific carrier **QNEW** or **QREW** Activity. 2. Select the **Marketing** Folder 3. Click Finish on the **Attach to** screen. |

### **Carrier Responses Received**

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| 1. Record carrier responses by adding NOTES in the **QNEW** **or QREW** activity for the appropriate carrier.    1. Right-click on the carrier’s **QNEW** **or QREW** activity    2. Select Add Note and enter a detailed note.    3. If the carrier responded with a quote, enter the amount of the quote in the amount field on the activity. Use “Premium Quoted” as the amount qualifier.   A screenshot of a computer  Description automatically generated  Drag & Drop Carrier emails to the carrier’s **QNEW** **or QREW** Activity |

### **Carrier Selected for Binding**

1. When a carrier is selected for **binding**, close that carrier’s **QNEW/QREW** as **Successful** and add notes.
2. **All other QNEW or QREW** activities should be **closed as Unsuccessful**, select a reason, and add notes as to why the carrier declined, or why the quote was rejected.

### **Move Binding Carrier Submission to Current Policies**

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| These steps must be followed in order **ONLY FOR THE BINDING CARRIER:**   1. Right-click the Master Submission and select **Create Carrier Submission**    1. Premium Payable = select the binding carrier    2. Submission Status = Completed    3. Click Finish 2. Right-click the Master Submission and select **Update Stage to Entered/Submitted**   A screenshot of a computer  Description automatically generated   * + Click Finish   ***The steps above must be done to Generate an Epic Proposal.***   1. Right-click the submission and select **Create Carrier Response**    * Description = Quoted / Bound    * Date Received = current date    * Carrier Response = Quote    * Enter Response Line Premium, carrier commission rate, and click Calculate.    * Click **Finish**   A screenshot of a computer  Description automatically generated   * + On the popup, select Yes Perform Action and select **Move Marketed Lines to Current Policies**   **A screenshot of a computer  Description automatically generated**  ***Policies Tab****:*   1. Select **Add new Policy for New Business** or **Renew existing policy** (to keep the lineage of the original policy) 2. Enter Policy Line, Description, Effective & Expiration Dates (if choosing Renew existing policy above, click the drop-down to search for the appropriate policy) 3. Update Stage to **Submitted** or **In Process** if policy detail edits are needed or if an invoice is required to bind. 4. Select **Contracted** policy unless an invoice is required to bind then choose **Prospective**.   A screenshot of a computer  Description automatically generated  ***Lines Tab:***   * Select the line(s) needing to be added to the new policy, renewal, or existing policy. * Select either   + **Add to this policy** - Add the line to the policy added under the Policies tab.   + **Add to a** **different policy**   + **Do not add to any policy.** * Keep in mind, that the choices made here affect only the highlighted line. * Use **Apply to All Lines** if the choices apply to all lines and not just the highlighted line. * **LINE** tab, select Status = NEW; enter Issuing Co (writing co); enter carrier commission rate   A screenshot of a computer  Description automatically generated   * **Billing** tab – verify the Main Business Contact (or whoever is to populate on an agency billed invoice) A screenshot of a computer    Description automatically generated * If the contact is not the Main Business Contact, click on the magnifying glass and choose the Main Business Contact from the Contact area:   A screenshot of a computer  Description automatically generated   * Delivery Method should always be **Mail** so when an invoice is transacted it is not emailed to the client without any explanation. * **SERVICING** tab – verify the employees in each servicing role.   A screenshot of a computer  Description automatically generated   * **PR/BR COMMISSIONS** tab.   A screenshot of a computer  Description automatically generated   * + Click the **ADD** button to add the producer who will be paid a commission on this policy.   + Producer Commission will default, if there are any discrepancies please reach out to your REA – Regina Kanen and SA – Eric Trueblood for guidance.   + Production credit should be 100%. * ***Attachments Tab*:**   + If Attachments were added to the Master Marketing Submission, they would show here.   + Check the attachments being moved with this Policy. * ***Activities Tab:***   + Any open activities existing for this Carrier Submission can be closed here. * When finished, click **MOVE.** * Update Submission status to Completed; click Finish. * **BND1** Activity – Bind Policy via Master Marketing   + Leave open for receipt of the policy.   + Add Notes and click Finish. * Change Policy view from MARKETED to CURRENT |

### **Policy Received from Carrier**

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| 1. Drag & drop the policy dec to the **BND1** Activityand check mark as **Important Policy document**. 2. **BND1** - Policy Check for accuracy    * When the policy is attached to the **BND1** Activity, **Mark as an Important Policy Document** – this will automatically attach to the policy and activity.   A screenshot of a computer  Description automatically generated   * + If the Policy is inaccurate, leave **BND1** open for follow-up; send to carrier or account servicer for correction.   + Processor will create a note when the policy checking is complete.  1. Issue the Policy in Epic:    * Highlight the policy.    * Click **ACTIONS > Issue/Not Issue Policy** and **Issue**    * Verify Policy #, Effective/Expiration Dates, and Policy Status (**NEW/REN/REW**)    * Click the **Close Open Activities** tab, close the open **BND1** activity as Successful, and add a final note.    * Click **FINISH** |

## **JA.2 Marketing Module (Full Version) (New or Renewal Business) SCAS PER EACH CARRIER**

### **Add Master Marketing Submission**

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| 1. Click the **Policies** area from the left Navigation Panel of the Client’s account. 2. Change policy view from **Current** to **Marketed**      1. Click the **ADD** button (+) 2. Enter a name for the Submission (Name: 23-24 Master Submission) 3. Enter the required information (Source, Department & type of business)   A screenshot of a computer  Description automatically generated   1. Add policies to the submission by clicking the **ADD** button under Policies to Market 2. **Add New Line**—Create new policy(ies) for marketing or, 3. **Add Existing Line—**Select from existing policies. Check all policies going out to market. **Include ALL lines of business going out to market.** 4. Click DETAIL 5. The **AMMK** Activity will auto-set to Closed as Successful; click Finish. 6. Click the **ATTACHMENTS** Tab and drag & drop or click the (+) to add existing Client Documents or browse your files outside of Epic for attachments to be included in the submission.   A screenshot of a computer  Description automatically generatedA screenshot of a computer  Description automatically generated   1. Enter/update policy details by clicking each line in the navigation panel and completing/updating each of the screens to fill in details in the ACORD apps (be sure to add detail to the Commercial AP/ACORD 125 first) 2. When finished, close Submission from the navigation panel (X) |

### **Create Carrier Submission**

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| 1. From the **Policies Marketed** list view, highlight the Master Submission. 2. Click **ACTIONS** > **Create Carrier Submission** 3. Enter the PPE (Premium Payable) Carrier (CA) or Broker (BR) name. 4. Update carrier submission description. 5. Check each line to submit to the specific carrier. 6. Enter the requested premium/commission (if desired)   A screenshot of a screenshot of a carrier submission  Description automatically generated A screenshot of a computer  Description automatically generated   1. Click the Attachments tab.  * Uncheck attachments that are not needed for this carrier. * Click the **ADD** button to attach additional documents, if needed  1. Click the **ADD** button to add additional carriers or, 2. Click **Finish**   A white rectangle with blue text  Description automatically generated |

### **Submit to Carriers**

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| 1. From the **Policies Marketed** list view, highlight the Master Submission. 2. Click **ACTIONS** > **Submit to Carriers** 3. Click **Continue.** 4. Choose the Radio button - Create one activity per Carrier Submission 5. Place a checkmark next to each carrier in which a submission should be sent or click the hyperlink **Select all.** 6. Highlight the first carrier and review all tabs related to the selected carrier. 7. Review attachments and ADD additional attachments if needed. 8. Highlight the next carrier (if applicable) and review all tabs as above. 9. Distribution—select Print, Email, or Fax and complete the details. Utilize the **Apply To** hyperlink to have Epic input the Subject line and/or Message to all carriers selected. 10. Preview by clicking on the Download & Print button if desired; Click Finish 11. **Activity** = **SCAS** defaults to open for 3 weeks; click Finish |

### **Create Carrier Response**

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| 1. Select the appropriate Master Marketing Submission 2. Click **ACTIONS** > **Create Carrier Response** 3. Enter a Description for the Response (i.e., Quoted $1,000; declined due to claims, etc.) 4. Enter Date Received 5. Click the Dropdown for Carrier Response and select Decline, Not Received, or Quote. 6. If multiple lines were submitted and the carrier response applies to all lines, click the hyperlink **Apply to All Lines** in the gray bar, right.   A screenshot of a computer screen  Description automatically generated   1. Click Detail 2. Update policy lines as needed per the Left navigation pane.   A screenshot of a computer  Description automatically generated   1. Close policy from the Navigation Panel (X) 2. If quoted, update stage: “Yes Perform Action” - choose **Update Stage to Entered** if still waiting on other carrier responses or **Move Marketed Lines to Current** if the client has accepted the carrier’s quote.   A screenshot of a computer screen  Description automatically generated |

### **Attach Quote-Related Documents to SCAS Activity**

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| 1. Be sure to attach all emails, documents, applications, etc. to **the specific carrier SCAS activity.** 2. Drag & drop onto the **SCAS** activity. 3. Select the **Marketing** Folder 4. Click Finish on the **Attach to** screen |

### **Bind/Accept Quote**

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| 1. When a carrier is selected for binding, leave the carrier **SCAS** activity Open until the policy dec is received from the carrier. 2. Close All other **SCAS** activities as Unsuccessful and select the reason from the dropdown list 3. Add notes as to why you’re not binding with each specific carrier, if applicable. |

### **Move Marketed Lines to Current Policies**

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| * If “Move Marketed Lines to Current” was chosen in STEP 3, continue to the Policies tab (below); otherwise, highlight the submission being moved, and click **ACTIONS > Move Marketed Lines to Current** * ***Policies Tab*:** * Select **Add new Policy** if this is a new policy/new business or, * Select **Renew Existing Policy** if creating the Marketing Submission from a Renewal * Select **Update Existing Policy** if adding policy lines to an existing policy. * Enter Policy Line, Description, Effective & Expiration Dates (if choosing to Renew the existing policy above, click the drop-down to search for the appropriate policy) * Update Stage to **Submitted**, **Issued**, or **In Process** (if policy detail edits are needed or if an invoice is required to bind). * Select **Contracted** policy unless an invoice is required to bind then choose **Prospective**.   A screenshot of a computer  Description automatically generated   * ***Lines Tab*:** * Select the line(s) needing to be added to the new policy, renewal, or existing policy. * Select either   + **Add to this policy** - Add the line to the policy added under the Policies tab.   + **Add to a** **different policy**   + **Do not add to any policy.** * Keep in mind, that the choices made here affect only the highlighted line. * Use **Apply to All Lines** if the choices apply to all lines and not just the highlighted line.   + **Billing** tab – verify the Main Business Contact (or whoever is to populate on an agency billed invoice) A screenshot of a computer      Description automatically generated * If the contact is not the Main Business Contact, click on the magnifying glass and choose the Main Business Contact from the Contact area:   A screenshot of a computer  Description automatically generated   * Delivery Method should always be **Mail** so when an invoice is transacted it is not emailed to the client without any explanation. * **SERVICING** tab – verify the employees in each servicing role.   A screenshot of a computer  Description automatically generated   * **PR/BR COMMISSIONS** tab.   A screenshot of a computer  Description automatically generated   * + Click the **ADD** button to add the producer who will be paid a commission on this policy.   + Producer Commission will default, if there are any discrepancies please reach out to your REA – Regina Kanen and SA – Eric Trueblood for guidance.   + Production credit should be 100%. * ***Attachments Tab*:**   + If Attachments were added to the Master Marketing Submission, they would show here.   + Check the attachments being moved with this Policy. * ***Activities Tab:***   Go to the Activities Tab and Close your **SCAS** activity  A screenshot of a computer  Description automatically generated   * When finished, click **MOVE.**   + Update Submission status to **Completed**; click Finish. * **BND1** Activity—Bind Policy via Master Marketing   + Leave open to follow up on receipt of policy or confirmation of coverage.   + Add Notes and click Finish * Change Policy view from MARKETED to CURRENT |

### **Policy Received from Carrier**

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| * Drag & drop the policy dec to the appropriate **Policy** in the client’s account. * **BND1** - Policy Check for accuracy   + When the policy is attached to the **BND1** Activity, **Mark as an Important Policy Document** – this will automatically attach to the policy and activity.   A screenshot of a computer  Description automatically generated   * + If the Policy is inaccurate, leave **BND1** open for follow-up; send to carrier or account servicer for correction.   + Processor will create a note when the policy checking is complete. * Issue the Policy in Epic:   + Highlight the policy.   + Click **ACTIONS > Issue/Not Issue Policy** and **Issue**   + Verify Policy #, Effective/Expiration Dates, and Policy Status (**NEW/REN/REW**)   + Click the **Close Open Activities** tab close the open **BND1** activity as Successful and add a final note.   + Click **FINISH** |

## **JA.3 Opportunities**

***This job aid shows how to set up an opportunity, update opportunity, and navigate the Dashboard and Opportunities sections on your home screen.***

**TIP:** First you will want to go to **Home<Configure<User Options<Customize Homebase<Select Dashboards and Opportunities** to show on your Home Base

### **Creating a new Opportunity**

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| **TIP:** If the opportunity pertains to a new client, a new prospect must be created before creating the opportunity.  **TIP:** A Sales Manager and Sales Team needs to be created before they can set up a new opportunity. Send request to [support@acrisure.com](mailto:support@acrisure.com) |

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| 1. Under client/prospect select **Opportunities** on the left navigation panel   A screenshot of a computer screen  Description automatically generated   1. To create a new opportunity, select the **+** to start.   A screenshot of a computer  Description automatically generated   1. Complete sections of the **Opportunity Detail.** Remember **RED** sections are required fields    1. Select whether the Opportunity is New or Renewal    2. Type a brief description of what business you are trying to obtain    3. Enter target close date (salespeople will know what this means)   A screenshot of a computer  Description automatically generated   1. Add a department to the **Structure** section.   A screenshot of a computer  Description automatically generated   1. Complete the **Estimated Value** section.    1. Make sure you fill in estimated **Revenue** since this is what pulls to your **Dashboard**, but other information may be entered   A screenshot of a computer  Description automatically generated   1. Choose your **Sales Team** and the **Owner** of the **Opportunity**. The Owner could be you as the servicer, or it could be the producer if entering behalf of the salesperson.A screenshot of a computer     Description automatically generated 2. Complete **Stage Details** to show what stage you are in your Opportunity.    1. Choose your Stage Group if you have one created for your team. If not, you can use **Default Group**    2. The **Stage** identifies the opportunity’s position in the sales pipeline*.* It also updates the percent of probability of winning the Opportunity.   A screenshot of a computer  Description automatically generated   1. Use the **Comments** section to add other information about this Opportunity. Click **Detail** when done.   A screenshot of a computer  Description automatically generated   1. An automatic **AOP** activity will be created and set to open to document and attach documents and correspondence. 2. More information sections will appear on your left **Navigation Panel**.   A screen shot of a computer  Description automatically generated   1. In the **Detail/Summary** section, there is a **Categories** tab. You can add **Agency Defined Categories** for your Opportunity if desired.    1. Add a Category by selecting the **(+)**   A screenshot of a computer  Description automatically generated   1. Under **Contact/Business Info**, you will addthe nameof the individual in contact with about this Opportunity.    1. You will use the **+** button to add their information   A screenshot of a computer  Description automatically generated   1. Under **Associated Items**, you can associate this Opportunity with a current **Marketing Submission,** **Policy**, or **Service**.    1. You will use the **+** button to add this information.   A screenshot of a computer  Description automatically generated |

### **Updating the Opportunity**

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| **TIP:** As you are working on your Opportunity, you will want to update the Stage. |

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| 1. From your **Home** screen, your created Opportunities will show in the **Opportunities** section. You can view by **30 Days, 60 Days, 90 Days**… From this section, you can click on the blue hyperlink, and it will take you to the **Opportunities Detail** or **Right Click** and update *the* information from there.    1. **Add Activity** – Add an F9 activity    2. **Change Stage** – Updated your stage    3. **Change Stage Group** – Amend your Stage Group    4. **Close** – Close your Opportunity either Won or Loss    5. **Renew** – Renew your Opportunity   A screenshot of a computer  Description automatically generated   1. As you work through your Opportunities, update the Stage to keep the Dashboard updated.    1. Each time you select **Change Stage**, it will automatically update to the next **Stage** in your **Group.**   A screenshot of a computer screen  Description automatically generated   1. Once an **Opportunity** is complete, you can **Right Click** on the Opportunity, and then **Close**.   A screenshot of a computer  Description automatically generated   1. Once you have selected **Close**, you will choose **Lost** or **Won**. If **Opportunity** is lost, choose a **Reason** for the loss. Once done, click **Finish**.   A screenshot of a computer screen  Description automatically generated   1. An **Automatic Activity** will appear. Select which code applies, add notes, and then **Finish** out Activity.   A screenshot of a computer  Description automatically generated |

### **Working through the Dashboard**

Your Home screen will show your **Dashboard**. As a team manager, you will have the opportunity to look at each team member's Dashboard.

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| **TIP:** Double-clicking on each graph will provide more detail about that information. Dates and values can also be changed in the more detailed view.  **TIP:** Graphs default to Revenue. |

A diagram of a business pipeline

Description automatically generated with medium confidence

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| * **Combined Sales**   + This shows up to 150 Days of new & renewal **Opportunities** and expiring policies. * **New Business YTD**   + This shows your sales goal that was set and your status with that sales goal. * **New Business Pipeline**   + This will show you the new business opportunities and where you are in the different sales stages. You may change your target date if needed. * **Renewal Pipeline**   + Shows your upcoming renewals and renewal **Opportunities.** * **Hit Ratio**   + This section will give you the Opportunities you have won and/or lost |

## **JA.4 Renewal Manager**

### Renewal Stages

***Details in the Renewals Manager view is related to the expiring policy.***

|  |  |
| --- | --- |
| **Stage Description** | **How it functions** |
| **Renewal Not Started** | Tied to the Event: **Policy Created** (display policies with this stage in the RM "**0**" days after expiration) |
| **Pre-Renewal In-Process** | Manual - (display policies with this stage in the RM "**30**" days after expiration) |
| **Submitted For Quote** | Manual - (display policies with this stage in the RM "**30**" days after expiration) |
| **Quote Received** | Manual - (display policies with this stage in the RM to "**30**" days after expiration) |
| **Proposed** | Manual - (display policies with this stage in the RM to "**30**" days after expiration) |
| **Renewal In-Process** | Tied to the event: **Policy Renewed** (display policies with this stage in the RM "**30**" days after expiration) |
| **Renewed** | Manual - (display policies with this stage in the RM "**0**" days after expiration) |
| **Did Not Renew** | Tied to the event: **Policy Cancelled** (display policies with this stage in the RM "**0**" days after expiration) |

### **Renewal Events**

#### **Policy Created**

This Event is responsible for a new policy as well as a renewed policy to be given the Stage Renewal Not Started. This Stage begins the renewal effort. Policies coming up for renewal will show in the RM, in advance of the renewal date with the Stage Renewal Not Started, according to the time frame assigned to the policy type.

* 120 days for commercial lines policy types
* 60 days for personal lines policy types
* 90 days for employee benefits policy types

#### **Policy Renewed**

This Event is tied to the Actions>Renew process. When the expiring policy (the current term…the policy currently being worked for renewal) is renewed (via Actions>Renew), the expiring policy (i.e., the current term… the policy currently being worked for renewal) will be given the Stage Renewal In-Process. The renewed policy (i.e., the policy created through the Actions>Renew process) will not show in the RM but will show in the Policy list view (e.g., Policies – Current/Renewed). The renewed policy will be given the Stage Renewal Not Started. This Stage should remain as is until ready to work on the policy renewal the following year. The renewed policy (i.e., the one created via Actions>Renew) will need to be Issued as normal. The Stage given to the expiring policy (i.e., the current term… the policy currently being worked for renewal) will need to be changed, by the user, to Renewed once the renewal policy has been Issued. This Stage, Renewed, will be the final Stage given to the expiring policy in the RM. An expiring policy with the Stage Renewed will drop from the RM view on the expiration day.

#### **Policy Cancelled**

This Event is tied to the Actions>Cancel>Issued process. The Stage shown on a policy canceled via the Actions>Cancel>Issued process will be Did Not Renew. Note: if the policy is reinstated, the Stage will automatically revert to the Stage it was assigned before it was canceled.

### **Renewal Manager Workflows**

#### **View Renewals**

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| 1. From the **HOME** screen select **Renewals Manager** from the Navigation Bar   A screenshot of a computer  Description automatically generated   1. Assigned Servicers accounts will be displayed with a **Renewal Not Started** Renewal Stage   A screenshot of a computer  Description automatically generated   * **Personal Lines**: 60 Days before expiration * **Commercial Lines**: 120 Days before expiration * **Employee Benefits**: 90 Days before expiration  1. Click once on renewal to select:      * **Go to Policy** – Moves directly into the policy under the client’s account * **Renew** – Starts the renewal process from the client’s account * **Marketing Submission** – Starts a marketing submission from the client’s account * **Update Renewal Stage** – Allows for manual update to the renewal stage * **Market Appetite** – Launches IVANS Market Appetite with a list of possible markets |

#### **Renew Policy**

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| 1. Select **Renew** then refer to the **Renewal Process**/**Non-Downloaded Policies** section within the Workflows Document      1. Once the renewal is started, the Renewal Stage will change to **Renewal In Process** 2. Manually update the stage as needed:   A white background with black text  Description automatically generated |

#### **Marketing Submission**

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| 1. Select **Marketing Submission** then refer to the **Marketing Module** section within the Workflows Document      1. The Renewal Stage will NOT automatically update while working through the Marketing Module. The Renewal Stage must be updated manually by selecting **Update Renewal Stage.**   A white background with black text  Description automatically generated |

#### **Canceled/ Non-Renewed Policies**

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| **Cancelled Policies:**   1. Refer to the [**Cancellations**](#_Cancel_Policy_Workflow) section within the Workflows Document 2. Once **Cancellation** has been issued, the Renewals Manager Stage will automatically be updated to **DID NOT RENEW** and will drop off the Renewals Manager list   **Non-Renewed policies:**   1. Refer to the [**Policy Not Renewed**](#_Policy_Not_Renewed) section within the Workflows Document 2. The Renewal Stage will NOT automatically update after the Policy has been manually non-renewed. Update the Renewal Stage by selecting **DID NOT RENEW** from **Update Renewal Stage**. This policy will NOT drop off the Renewals Manager list but will stay for one day AFTER expiration |

## **JA.5 Proofs of Insurance**

### **Auto ID Cards**

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| 1. Select Policy 2. **ACTIONS >** **Issue Auto ID Card** 3. Highlight the appropriate vehicle—make sure there’s a **Y** under the Issue Column or Click Select to Issue if not 4. Click the Distribution Tab 5. Select Contact (use the magnifying glass to locate) 6. Select Via (Print, Email, Fax) and enter additional details 7. Click **Finish**—AUID Activity defaults closed   A screenshot of a computer  Description automatically generated   1. To Issue a Fleet ID card click the pencil on the left and using the drop-down arrow choose Fleet Card, click select to Issue and Finish.   A screenshot of a vehicle registration form  Description automatically generated |

### **Evidence Of Insurance**

#### **Add New Evidence**

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| 1. Locate Account 2. Click the **NEW** button—**Proofs > Evidence** 3. Select the appropriate ACORD form; enter a Title 4. Under Type, select the appropriate policy and service summary row 5. Click Detail 6. Click each section and enter details 7. When completed, click **ACTIONS >** **Issue Evidence** 8. Click the Additional Interest Distribution Tab    * Select Contact (use the magnifying glass to locate)    * Select Via (Print, Email, Fax) and enter additional details    * Click Finish 9. Click the X in the Navigation Panel to close the EPI |

#### **Renew Evidence**

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| * + - 1. Locate Account       2. Click Proofs of Insurance from the Navigation Panel       3. Select Evidence       4. Highlight the appropriate EPI       5. Click **ACTIONS** > **Renew Evidence**   + Select the renewal policy and service summary row   + Select the lines of business to include   + Check the defaults to include   + Click **Detail**     - 1. **Activity REVI** defaults closed—add notes, click Finish |

#### **Issue Single / New Additional Interest**

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| * + - * 1. Locate Account         2. Click Proofs of Insurance and select Evidence         3. Click **ACCESS** > Activities—all activities         4. Select the **REVI** Activity and review notes         5. Click **ACCESS** **> Attachments** from the **REVI** Activity and review         6. Click Proofs of Insurance and edit the appropriate EPI         7. Highlight the additional interest—click the **ADD** button to add new AI and detail         8. Click **ACTIONS > Issue Singe Additional Interest**         9. Uncheck Insured if not needed. Verify AI distribution.  1. Click **Finish** |

### **Certificate Processing in Epic**

#### **Step 1: Add Master Certificate Template**

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| 1. Locate Client 2. Highlight the client on the **Locate** screen and click **Proof of Insurance** on the left navigation panel 3. Under the Certificates – Liability Section, click the **ADD** button   A screenshot of a computer  Description automatically generated   1. Select the ACORD type and enter a title (i.e., 2022-23 Master Certificate)   A close up of a certificate  Description automatically generated   1. Click **DETAIL** at the bottom right 2. Verify the Insured’s name and address 3. On the left panel click **General Liability** to build the GL template 4. Click the **ADD** button under **Available Templates** A screenshot of a computer screen     Description automatically generated 5. Click the dropdown in the **Line of Business** field and select the current GLIA policy 6. Enter a **Description** (i.e., GL 2022-23) 7. The limits will pull in from the policy detail. If not, go back to the policy detail enter the coverage and limits detail first before creating the certificate templates. 8. Be sure to check the **Default Template** box to ensure the limits will pull in for each Certificate Holder added.   A screenshot of a computer  Description automatically generated   1. Repeat the process for the Auto Liability, Excess Umbrella Liability, Work Comp Liability, etc.   A screenshot of a computer  Description automatically generated  A screenshot of a computer  Description automatically generated  A screenshot of a computer  Description automatically generated  A screenshot of a computer screen  Description automatically generated   1. Under **Descriptions of Operations** on the left panel, enter the descriptions of operations here if the language pertains to **ALL** certificate holders. Any holder-specific language should be entered at the Holder level.   A screenshot of a computer  Description automatically generated   1. Adding **Attachments** at the master level means the attachment pertains to **ALL** certificate holders. If attachments are holder-specific, add them at the holder level only.   A screenshot of a computer  Description automatically generated |

#### **Step 2: Add Certificate Holders**

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| 1. To add **Holders**, click Holders on the left panel   A screenshot of a computer  Description automatically generated   * 1. If the **certificate holders** exist on another Certificate Master in this account, they can be copied by clicking the **Copy from Another Certificate Link** at the top right of the screen. A blue rectangle with white text       Description automatically generated   2. Select the Master containing the holders needed and then select which holders to copy. The holder description of operations and attachments existing on the other master can also be defaulted.   A screenshot of a computer  Description automatically generated   * 1. Click Finish  1. To add a new holder, click the **ADD** button under Holders   A screenshot of a computer  Description automatically generated   1. Enter the name, address, and distribution method of the new Certificate Holder. Templates will default.   A screenshot of a computer  Description automatically generated   1. Click the **Description of Operations** tab and enter the **holder-specific** description of operations. If adding language to the summary field, check the box to Print Holder Summary so it will appear on the certificate. There is room below this field to add more detailed information if needed.   A screenshot of a computer  Description automatically generated   1. Click the **Documents Attached** tab to attach **holder-specific** attachments, such as an Additional Insured Coverage form. Click the **Holder Details** tab and select the appropriate checkboxes as needed. 2. Verify the **Named Insured**. Click the magnifying glass to select the appropriate Named Insured from the **Contacts** area of the client’s account. ***\*\*Important*** *this is the Named Insured that pulls into the Certificates.*   A screenshot of a computer  Description automatically generated |

#### **Step 3: Issue Certificate**

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| 1. From the **Certificates** list view, select the appropriate **Master** and **Holder**   A screenshot of a computer  Description automatically generated   1. Click **ACTIONS > Issue Certificate** for multiple holders, or **Issue Single Holder** for one holder.   A screenshot of a computer  Description automatically generated   1. Enter a **Contact Name** (required) from the dropdown list 2. Click the **Organization Contact** tab to verify the agency’s address and contact information 3. Click the **Holder Distribution** tab    1. Check the Holder and click on the holder to highlight. The information shown beneath the **Distribute To** list pertains to the highlighted item.    2. Check **scanned signature** default. This is a required field.    3. Enter **Delivery Options**. If emailing, the subject is a required field. The certificate delivery can also include a cc and bcc.    4. To preview the Certificate before sending it, click the **PREVIEW** button.   A screenshot of a computer  Description automatically generated   * 1. Click Finish.  1. A system-generated **CERT** Activity will default. Click **Finish**. 2. A copy of the Certificate is automatically attached to the client’s Attachments.   A screenshot of a computer  Description automatically generated |

### **[JA.6 DocuSign Integration](#_JA.7_DocuSign_Integration)**

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| **From Attachments in the Client’s account**:   1. Right-click the attachment and select **Send to eSignature**   A screenshot of a computer  Description automatically generated   1. A screenshot of a login form     Description automatically generatedA screenshot of a login screen     Description automatically generatedLog into **DocuSign** using your email address and password. 2. Allow DocuSign permission to integrate with Epic.   A screenshot of a computer  Description automatically generated   1. Select an Epic Contact; click the TO button   A screenshot of a computer  Description automatically generated   1. Please wait while Epic directs the document to DocuSign for signature fields. 2. Add appropriate fields for signature, date, text, etc. by dragging and dropping them onto the document.   A close-up of a document  Description automatically generated   1. If using a template, remove the extra recipient. Actions>Edit Recipient. A computer screen shot of a application     Description automatically generated 2. Once finished, select Actions>Edit Message.   A computer screen shot of a application  Description automatically generated   1. Edit the email subject line and personalized message to the client and select Done.   A screenshot of a application  Description automatically generated   1. Select Send via the top right or bottom right corner when finished.   A application form with text and numbers  Description automatically generated   1. DocuSign will redirect you to sign into your account to manage your envelopes. Close out when finished. 2. A system-generated **ESIG** activity will appear and is set to remain open for follow-up. If another activity is open and related to the process, close **ESIG** as successful. |