

Personal Lines

Workflows & Procedures

*for*

Acrisure Southeast Partners Insurance Services, LLC

v03/27/20A picture containing text, sign

Description automatically generated25

# 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 **Workflows**, 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**      * The left pane will open and show a listing of topics      * Click on the topic to jump to that section/page. * Hyperlinks within the document will lead to specific pages or Job Aids.      * Some hyperlinks will connect to a webpage outside of the document. |

# 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 Done | **EDGE**    Click the star icon  Enter name and add to Favorites Bar; click Done | |

## Browser Tabs

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| Browser tabs will open at the top when accounts are located and selected    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 |

## 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 run on your computer. If you are experiencing functionality issues after shutting down, submit a ticket to [support@acrisure.com](mailto:support@acrisure.com).  ***Reminder: A hard shut down of your computer should be done at the end of each workday.*** |

## Logging out of Epic

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| **\*\*IMPORTANT\*\***  When **closing out of Epic,** click the **LOGOUT** button at the top right in the blue Options Bar. **Do not X out.** Epic will not close properly which may cause issues when signing back in again.  **NO** |

**Shutting Down Desktop**

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| **\*\*IMPORTANT\*\***  Log out of Epic and SHUT DOWN your computer **at the end of each workday.**   |  |  | | --- | --- | | 1. Shut down the computer by clicking the Start Menu in the bottom left-hand corner of your desktop |  | | 1. Click Power |  | | 1. Click Shut Down |  | |

# EPIC BASICS

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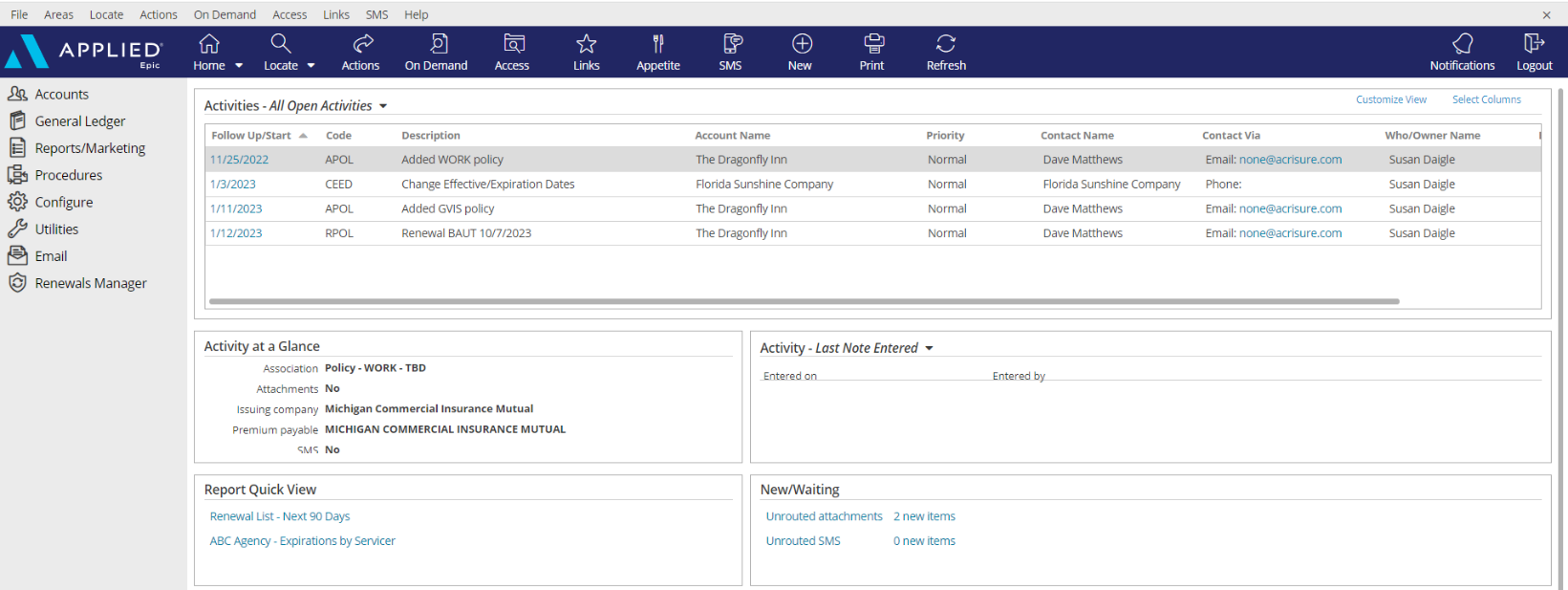
## Epic Icons

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|  | 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 options as found in 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 |  | Contacts in Outlook (from email) |

## Keyboard Shortcuts

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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** – when a task within an activity is assigned to you, the task will appear here but 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 to the client’s account. Items available will 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 will change depending on which screen is being utilized. 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 a list of the last 20 accounts accessed |

## Client Accounts

### Account Sources – REQUIRED FIELD

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
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| |  | | --- | | 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 - Client | | 2. Referral - Employee | | 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 | | Z. Update Needed | | **Account Source is a Required Field.**  **Be sure to select the appropriate Source for tracking and reporting purposes.**  If the policy source is unknown,  select “**Update Needed**” to update at a later time. |

### Servicing Roles

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| **External Service Team** | |  | | --- | | Acrisure Service Center | | Carrier Service Center | | GA - Emerson Reid | | GA - Martin 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 Service Team from the drop-down list.**  **Note:**  **An Acrisure-owned GA will be indicated with an asterisk.** |
| Marketing |
| P&C Producer 1 (Primary Producer) |
| P&C Producer 2 |
| P&C Servicer 1 (Primary Servicer) |
| P&C Servicer 2 |
| P&C Claims |
| P&C Account Executive |
| Surety Producer (Primary Producer) |
| Surety Servicer (Primary Servicer) |
| EB Producer 1 (Primary Producer) |
| EB Producer 2 |
| EB Servicer 1 (Primary Servicer) |
| EB Servicer 2 |
| EB Account Executive |
| Non-Insurance Producer |
| Non-Insurance Servicer |
| CRM Relationship Manager |
| Contract Producer/Consultant |  |
| Contract Servicer |  |

### Locate Account

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| * 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.) |

### 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. |

## Contacts

### 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 made available, such as date of birth, SSN, marital status, driver's license number, etc. Click the lock to the right of the PII fields to secure the field, making it private. |
| **Primary Contact** | This is an **individual contact** that 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 on the bottom left corner of the client’s account. |
| **Category** | Contacts are categorized based on their relationship to the Account: Contact Only—Policy Only—Both Contact & Policy |
| **Description** | Add **Description** **(required field)** 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   |  |  | | --- | --- | | \_\_User - Benefits Technology | \_EB Compliance | | \_\_User - CSR24/Portal | \_EB Compliance Newsletter | | \_\_User - HR Portal | \_EB Eligibility Contact | | \_\_User - Indio | \_EB HRLS Compliance Summit | | \_\_User - Insite Portal | \_EB Plan Admin | | \_\_User - Succeed | \_EB VIP | | \_\_User - Zywave | \_HR Leader | | \_\_User - Zywave LMS | \_Personal (DM) | | \_Certificates | \_Personal (PC) | | \_Commercial (DM) | \_Risk Management (PC) | | \_Commercial (PC) | \_Safety (PC) | | \_Cyber (DM) | \_Surety (DM) | | \_Cyber (PC) | \_Surety (PC) | | \_EB (DM) | \_Work Comp (DM) | | \_EB (PC) | \_Work Comp (PC) | | 401K Plan Administrator | Acrisure Webinars | |

## Add Additional Contacts

### Add Individual Contact

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| 1. From the client’s account, click **Contacts** in the left Navigation Panel 2. Click the **Add** Badge Follow outline 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 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** to add preferences and personal information such as date of birth, SSN, License # etc. 2. Click **Save Contact** |

### Add Additional Addresses (Mailing or Billing)

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| 1. From the client’s account, click **Contacts** in the left Navigation Panel 2. Click the **Add** Badge Follow outline button   A screenshot of a computer  Description automatically generated   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:** An L- description can be selected to indicate the type of address A screenshot of a computer     Description automatically generated 5. Enter the **Address**. Attn: or C/O should be added to Address line 2 as needed 6. An **Address Description** can be added to indicate the type of address 7. Enter phone number (indicate if mobile) and email address.   ***NOTE:*** If the contact does not have an email address, enter [none@acrisure.com](mailto:none@none.com)   1. Click **DETAIL** to add preferences and personal contact information. 2. Click **Save Contact** |

## 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 note 2. Collapse the note by clicking the double up arrows 3. Manage the Sticky Note by clicking the three vertical dots      1. Delete the Sticky Note by clicking the X 2. Add a New Sticky Note by clicking the + |

## Email

### Microsoft Outlook Integration with Epic

#### Set Outlook Email Integration Default

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| ***Setting Outlook as the Email Integration Option will allow the launch of Outlook from Epic. Emails sent from Epic will automatically attach to the client’s account and will also add a Sent Item in Outlook.***  ***This integration applies to emailing from Attachments or from any of the blue email links within a client’s account. This does NOT apply to the Distribution Manager.***   1. From the Home Base, click **Configure** from the left Navigation Panel 2. Click **User Options** and select **Email** 3. Select the Outlook radio button      1. Click **Finish** |

### Configuring Attach to Epic Plug-In in Outlook

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| 1. Open Microsoft Outlook 2. Find **Attach to Epic** in the ribbon and click the down arrow next to the word **Applied**      1. Select Browser 2. Enter the Applied Epic Browser URL 3. Choose a Default Browser      1. X out of this window |

### Email from Distribution Manager

#### Set up Distribution Manager Email Account

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| 1. From the **Home Base**, click **Configure** from the left Navigation Panel 2. Click **User Options** and select **Distribution Email Accounts** 3. If more than one account is listed, **delete all except Primary Email Account**      1. Highlight Email Account and click the **Edit** pencil 2. Enter the Distribution Email Details as follows    * Associated Agency =  * **1SE Acrisure Southeast Partners Insurance Services, LLC** * **NJV – NHG Specialty LLC** * **TUG – Acrisure Southeast Specialty Insurance Agency, LLC**   + Display Name = enter your full name   + Reply address = enter your email address  1. Click **Finish**   ***NOTE: For those whose legal entity name is being retained (Public Entity, Financial Services, etc.) it is important NOT to use the Acrisure email address; use your legal entity’s email address.*** |

#### Set up Distribution Email Signature

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| 1. From **Outlook**, Copy your email signature (Right Click/Copy or CTRL+C) 2. Go back to EPIC 3. From the **Home Base**, click **Configure** from the left Navigation Panel 4. Click **User Options** and select **Distribution Email Accounts** 5. With your DMS email account highlighted, click the edit pencil 6. Click the **Email Signature** tab 7. Click the **Add** Badge Follow outline button 8. Enter a **Description** for your signature and check the **Default** box      1. In the white space below the format buttons, paste the email signature which was copied in Step 1 above (Right Click/Paste or CTRL+V) |

#### \*If Acrisure Logo does not paste appropriately follow the steps below\*

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| 1. Right click your Acrisure logo from your email signature inside of outlook and click Save as picture.      1. Go back into Epic, Click to Highlight box where logo should appear. 2. Select Insert/Edit Image Button 3. Search for Logo saved to your computer      1. Once Logo is selected click Open, then Click blue Ok button. 2. Resize Acrisure logo as needed. 3. Click **Finish** 4. The email signature will now be listed    Click Finish |

#### Send 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. If the documents need to be sent to multiple contact recipients, Click on **“To”** Button      1. Contact Address Book will open. Double click on the Contact Name to add as an additional recipient. Once all additional recipients are added, click **Finish.** You can also blind copy by selecting Bcc. |

## Faxing

### From Distribution Manager

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

## Attachments

### Adding Attachments and Documents by Dragging & Dropping into Epic

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| 1. Drag & Drop from Outlook, Network folder, or Desktop into Epic 2. Attach all Documentation to the corresponding **ACTIVITY**  * **Mark as an Important Policy Document** if it is a Final Policy Document * Use this feature to quickly find important documents such as policy dec pages, audits, endorsements, or other important documents.   ***NOTE: When creating initial activity, it is Best Practice to attach Activity to the Policy level. If there is no Policy when Activity is created, attach Activity to the Account level.***    Check the Client Accessible box to make an attachment available in the client portal (CSR24)  Remove description and update using Platform [Naming Convention](#_JA.9***CONFIRM_Attachment_Naming)  Use this feature to quickly find important documents such as policy dec pages, audits, endorsements, or other important documents.  Select the appropriate access level for security |

### Attach using Add Attachment Button located in Attachment area:

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| 1. Click the **Add** Badge Follow outline button    1. Select **Existing File** (from outside of Epic (i.e., local or network drive))    2. Select **Document** to access the Form Letter library    3. Select **eForm** to add a form filler ACORD form from the eForms library |

### Add Attachments and Documents using Attach to Epic Plug–In

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| **Attaching New Email Using Attach to Epic Plug-In**   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. When finished with email and all relevant documents are attached, click **SEND**.      1. Attach To tab will open in Browser 2. Click Magnifying Glass to the right of the Code Field to Locate Client. Click **Finish** Once Account is found. 3. Under Attach To – Identify and select the appropriate dropdown (Policy or Activity) for where the Email and/or documents should be attached to. 4. Once all required fields are completed, Click **Finish** and email will be routed into Applied.   **Attaching Existing Email Using Attach to Epic Plug-In**   1. Highlight or right click 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 Box the **“Delete original after attaching”** box   ***NOTE: If this box does not get un-checked, your email will be deleted from outlook.***     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 generatedLet 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** |

### Attachment Access Levels

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| 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 | Financial Services | | 4 | Client Financials | | 5 | HR Consulting | |

### 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.9_Attachment_Naming)***.***

### Finding and viewing 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 |

### Folder Structure

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| |  |  |  | | --- | --- | --- | | Property & Casualty | Applications |  | | Appraisals |  | | Audits |  | | Auto IDs |  | | Bind Requests |  | | Binders |  | | Cancellations |  | | Cancellations/Reinstatements |  | | Certificates |  | | Change Requests |  | | Claims | Claim Correspondence | | Claim Invoices | | Claim Payments | | Estimates | | Loss Notice | | Loss Runs | | Photos | | Contracts and Agreements | Contracts | | Premium Finance Agreement | | Correspondence |  | | Endorsements |  | | Equine | Equine Mortality | | Evidence of Insurance |  | | Financial Statements |  | | Inspection Reports |  | | Loss Runs |  | | Marketing | Correspondence | | Quotes | | Submission | | Declinations | | MVR’s |  | | Policies |  | | Policy Checking |  | | Proposal |  | | Renewal | Non-Renewal | |  | | Risk Management |  | | Schedules |  | | Work Comp | Dividends | | Work Comp Forms | | Work Comp Mod Sheets | |

### 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 Navigation Panel to see sub folders |

### Folder Structure

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| |  |  |  | | --- | --- | --- | | **Property & Casualty** | Applications |  | | Appraisals |  | | Audits |  | | Auto IDs |  | | Bind Requests |  | | Binders |  | | Cancellations |  | | Certificates |  | | Change Requests |  | | Claims | Claim Correspondence | | Claim Invoices | | Claim Payments | | Estimates | | Loss Notice | | Loss Runs | | Photos | | Contracts and Agreements | Contracts | | Premium Finance Agreement | | Correspondence |  | | Endorsements |  | | Equine | Equine Mortality | | Evidence of Insurance |  | | Financial Statements |  | | Inspection Reports |  | | Loss Runs |  | | Marketing | Correspondence | | Quotes | | Submission | | Declinations | | MVR’s |  | | Policies |  | | Policy Checking |  | | Proposal |  | | Renewal |  | | Risk Management |  | | Schedules |  | | Work Comp Mod Sheets |  | | **Sales** |  |  | |

### Form Letter Templates

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| To select a form letter:   1. Click the Attachments area in the Client account 2. Click the **Add** Badge Follow outline button 3. Select Document – click Continue      1. Select a **Template Folder** (i.e., Personal) 2. Select the form letter from the dropdown list      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.    1. If “Send Via Email” an attachment screen will pop up. The description can be changed for the email attachment if needed. |

### Access Filter

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| The **Access** button will filter items for a specific policy, activity, 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_CSR24_–) Portal    * **Notifications** = displays notifications related to the selected policy   ***Note: Use the Access button to filter attachments, Example: Highlight policy, Access/Attachments, and only the attachments associated with the policy will appear.*** |

## Activities

|  |
| --- |
| Activities in Epic perform three essential functions:   * Add a record to the client file to reflect an action was performed. * Allow a follow up or Open Activity serves as a reminder to do something at a current or future date * Permanently documents the file with the use of Notes within Activities   ***NOTE: Activities or Notes in an Activity cannot be moved to another account*** |

### Home Base Open Activities

|  |  |
| --- | --- |
| **Select Columns** | Check or uncheck the columns desired to reflect within the Home Base View |
| **Customize View** | Allows 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, will move selected activity to their Home Base* * **View All Notes** – *Read all notes related to a specific activity process*      * **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*** |

### Activity Access Levels

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

### Activity Workgroups

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| |  |  | | --- | --- | | **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 | | CERT | Certificates | | CIDT | ACRISURE Centralized Interface Download Team | | CJRP | 3rd Party Workgroup – Jupiter/Resource Pro | | CML3 | 3rd Party CL Workgroup – Miami Lakes/Resource Pro | | CPRM | 3rd Party Workgroup – Miami / Resource Pro | | CPRT | 3rd Party Workgroup – Tampa/Resource Pro | | CPTL | 3rd Party Workgroup – Leesburg/Patra | | CPTN | 3rd Party Workgroup – Naples/Patra | | DBSC | Direct Bill Service Center | | INVO | Invoicing | | PSER | PL Workgroup - Leesburg | |  |  | |  |  | |

### System Generated Activity Codes

|  |  |  |
| --- | --- | --- |
| **Code** | **Description** | **Event** |
| **@APY** | Applied Pay payment received from &ContactName& | Payment from Client |
| **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 |
| **ADJR** | # Adjust Receipt | Adjust Receipt |
| **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 ( &OintNm& ) | 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 |
| **CLBT** | # Close Binder Transaction | Close Binder Transaction |
| **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 |
| **Code** | **Description** | **Event** |
| **I-CS** | # Indio Carrier Submission Added | Indio Carrier Submission Added |
| **LOS1** | # Lost Opportunity: &AcctName& | Close Opportunity |
| **MQS** | # Mark Quote Sold - &PolDesc& | Mark Quote Sold |
| **NPQS** | # New Personal Quote Started - &PolDesc& | Generate New Quote in Epic Quotes |
| **PMT1** | # Receipt for Payment | Generate Receipt for Payment |
| **PMT2** | # Receipt for Payment - SWEEP | Generate Receipt for Payment |
| **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 |
| **RPQS** | # Rewrite Personal Quote Started &PolDesc& | Generate Rewrite Quote in Epic Quotes |
| **SCAS** | # Submitted to Carrier &PPEName& for quote on &PolDesc& | Submit to Carriers |
| **SMR** | # SMS Routed | SMS Routed |
| **SMS** | # SMS Sent | SMS Sent |
| **WON1** | # Won P&C Opportunity: &AcctName& | Close Opportunity |
| **WON2** | # Won EB 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 |
| **WON9** | # Won FIN Opportunity: &AcctName& | Close Opportunity |

### Manual Activity Codes (F9)

#### For Accounting Workflow Activities – See [SharePoint](https://acrisure.sharepoint.com/:w:/s/ACR-ABSAccountingTeam/ESAdZgcBwPdJt0_n5-hNILkBueeqZpQWrGK6rg54rr9l7g?e=4LVSdM&clickparams=eyJBcHBOYW1lIjoiVGVhbXMtRGVza3RvcCIsIkFwcFZlcnNpb24iOiI0OS8yMzExMzAyODcyNCJ9) for Platform Activity Guide

#### Personal Lines Workflow Manual Activities

|  |  |  |
| --- | --- | --- |
| **Code** | **Description** | **When to Create Activity** |
| **GACR** | Acrisure Real Estate Services Referral | Created by an Account Executive or Account Manager to track when a Real Estate Referral is Received |
| **GACS** | Acrisure Cyber Services Referral | Created by an Account Executive or Account Manager to track when a Cyber Services Referral is Received |
| **GAPT** | Appointment with &AcctName& | Created when an Appointment is made with a Client |
| **GCAL** | Call from &AcctName& | Created when a general call or email is received. |
| **GNRN** | Policy Not Renewed | Created to attach the notice or communication of a client policy not being renewed. |
| **GXFL** | Ex-date follow-up for &AcctName& | Created to reach out to the client in the future to win back their business. |
| **PAPR** | PL - Appraisal | Created when an Appraisal is received |
| **PARV** | PL – Account Review | Created when an Account Review is initiated |
| **PBFO** | PL – BOR Follow Up | Created when a Future BOR is requested. |
| **PBIQ** | PL - Billing Inquiry | Created when a Billing Inquiry is received |
| **PBND** | PL Bind Request to Carrier | Created when a Bind Request is to be sent to the carrier. |
| **PCIQ** | Coverage Inquiry | Created when a Coverage inquiry is received from the client or an additional interest. |
| **PCN1** | PL - Carrier Notice of Cancellation | Created when a carrier notice of cancellation (NOC) is received. |
| **PCN2** | PL - Notice of Cancellation for Non-Payment | Created when a notice of cancellation (NOC) for non-payment is received. |
| **PCRF** | PL - Refer Claim to Claims Team | Created when a Claim is referred to our Internal Claims Team |
| **PEOP** | PL - EOP Request | Created when an Evidence of Property is Requested from our client or an additional interest. |
| **PLCR** | PL - Loss Control Recommendation | Created when a Loss Control Program is created for the client. |
| **PLRR** | PL – Renewal Review | Created when reviewing an upcoming renewal policy to be sure the incumbent is still the best fit. |
| **PMVR** | PL - MVR Request | Created when we receive an MVR Request. |
| **PNCO** | New PL Client Onboarding | Created when we are Onboarding a New Client to our Agency |
| **PPCK** | PL - Policy Checking | Created for Checking Policy Shell information for accuracy after adding, renewing, or endorsing a policy. |
| **PPIN** | PL – Property Inspection | Created when a Property Inspection is received or notified by the carrier inspection has been scheduled. |
| **PPRN** | Personal Pre-Renewal Review | Created for documenting the Pre-Renewal Notice |
| **PRPL** | Pre-Renewal Notice PL HNW &PolExpDate& &PolDesc& | Created for documenting the Pre-Renewal Notice for HNW |
| **Code** | **Description** | **When to Create Activity** |
| **PRSK** | Account At Risk | Created for review of an Account at Risk. |
| **PSLF** | PL – Surplus Lines Tax Documents | Created for Surplus Lines documents |
| **PUND** | PL – Underwriting | Created for any underwriting correspondence not regarding an Action Event (applications, endorsement, etc) |
| **QNEW** | Quote - New Business | Created for documentation during the new business quoting process |
| **QREW** | Quote – Renewal / Rewrite | Created for documentation during the rewrite quoting process for midterm or at renewal |

## Policy Basics

### Policy 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 – 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 | | 4. Other/Unknown | | 5. Win Back | | 6. Call In/Walk In | | Z. Update Needed | | **Account Source is a Required Field.  Be sure to select the appropriate  Source for tracking and reporting purposes.**  If the policy source is unknown, select “**Update Needed**” for update at a later time. |

### Policy Types

|  |  |  |
| --- | --- | --- |
| **CODE** | **DESCRIPTION** | **APPLICATION DETAIL** |
| **PANI​** | PER Animal Mortality | < None >​ |
| **PARA** | PER Roadside Assistance |  |
| **PAU1​** | PER Automobile​ | Personal Auto Detail​ |
| **PAU2​** | PER Automobile - Antique​ | Personal Auto Detail​ |
| **PAU3​** | PER Motorcycle​ | Personal Auto Detail​ |
| **PAU4​** | PER Recreational Vehicle​ | Personal Auto Detail​ |
| **PAU5** | PER Golf Cart |  |
| **PAV1​** | PER Aircraft​ | < None >​ |
| **PBR​** | PER Builders Risk​ | < None >​ |
| **PCL1** | PER Cyber Liability | < None > |
| **PCON​** | PER Condominium​ | Residential Section - Homeowners​ |
| **PDF1​** | PER Dwelling Fire​ | Residential Section - Dwelling Fire​ |
| **PDF2​** | PER Dwelling Fire - Farm​ | Residential Section - Dwelling Fire​ |
| **PDIC** | Per Difference in Condition | Residential Section - Homeowners |
| **PEP1** | PER Employment Practices Liability |  |
| **PEQ1​** | PER Earthquake (HO)​ | Residential Section - Homeowners​ |
| **PEQ2** | PER Earthquake (DF) | Residential Section - Dwelling Fire​ |
| **PEQU** | PER Equine | < None >​ |
| **PFL1​** | PER Flood (NFIP)​ | Flood Insurance Preferred Risk Policy Application​ |
| **PFL2​** | PER Flood (Private)​ | Flood Insurance Preferred Risk Policy Application​ |
| **PFL3​** | PER Flood - Excess​ | Flood Insurance Preferred Risk Policy Application​ |
| **PGPL** | PER Gap Liability | < None > |
| **PHO1​** | PER Homeowners​ | Residential Section - Homeowners​ |
| **PIM​** | PER Inland Marine​ | Inland Marine Detail​ |
| **PKR** | PER Kidnap & Ransom | < None >​ |
| **PLG1** | PER Group Personal Excess Liability | < None >​ |
| **PLG2** | PER Group Personal Cyber Liability | < None >​ |
| **PMH1​** | PER Mobile Home​ | Residential Section - Mobile Home​ |
| **PPET​** | PER Pet​ | < None >​ |
| **PPKG​** | PER Personal Package​ | < None >​ |
| **PPKP** | PER Personal Farm Package (CL) |  |
| **PSEV​** | PER Special Event​ | < None >​ |
| **PTEN​** | PER Tenant​ | Residential Section - Homeowners​ |
| **PTRV​** | PER Travel Accident​ | < None >​ |
| **PUMB​** | PER Umbrella​ | Personal Umbrella Detail​ |
| **PUMX** | Per Umbrella (Excess) | Personal Umbrella Detail |
| **PVAL** | PER Valuable Articles and Fine Art |  |
| **PWAT​** | PER Watercraft​ | Watercraft Detail​ |
| **PWC1** | PER Workers Compensation | < None >​ |
| **PWI1​** | PER Wind (HO)​ | Residential Section - Homeowners​ |
| **PWI3** | PER Wind Deductible Buy Back | Residential Section - Homeowners​ |
| **PWI4** | PER Wind – Assigned Risk | Residential Section - Homeowners​ |
| **PWI5** | PER Wind (DF) | Residential Section - Dwelling Fire​ |
| **PYAC** | PER Watercraft (Over 26’) | Watercraft Detail |

### Policy Statuses

|  |  |  |
| --- | --- | --- |
| **Code** | **Description** | **When Used** |
| **NBR** | New - BOR | New policy acquired via BOR |
| **NEW** | New | Net-new policy |
| **NX1** | New – Cross Sell – Under 10K | New policy cross sold within the Platform if Total Annual Account revenue is under $10,000 |
| **NX2** | New – Cross Sell – Over 10K | Renewal of a cross sold policy if Total Annual Account revenue is under $10,000 |
| **REN** | Renewal | Renewed policy with same carrier |
| **REW** | Renewal – Rewrite (First renewal w/new carrier) | Policy rewritten with another carrier on renewal |
| **RX1** | Renewal – Cross Sell – Under 10K | Renewal of a cross sold policy if Total Annual Account revenue is under $10,000 |
| **RX2** | Renewal – Cross Sell – Over 10K | New policy cross sold within the Platform if Total Annual Account revenue exceeds $10,000 |
| **CNW** | Cancelled (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) | Cancelled from original carrier and rewritten with another carrier |
| **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 |

Issuing Company / Premium Payable

|  |
| --- |
| **EPIC 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. |

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

|  |
| --- |
| * **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 Issuing Company (ICO)

|  |
| --- |
| **When setting up a policy, it is critical to select the correct writing/issuing company. This selection will pre-fill the correct Billing Company (PPE).** |

### Select the Correct Broker Payable Contract

|  |
| --- |
| * **If the PPE is a Broker,** change the Premium Payable CA to BR and select the Broker from the dropdown list * Select the correct Payable Contract by clicking the dropdown arrow * **This step is critical to align accurate Accounting functions** |

### Service Summary Rows and Stages

|  |
| --- |
| 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 #4 *will default to* 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 internal changes because Service Summary row #1 will only reflect the details of the policy when the policy term began.    ***NOTE: When viewing a multi-line package, 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.***    **Single click on a line of business then the most recent Service Summary Row will default.**  **See below***.*    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 |

### Change Policy Dates

|  |
| --- |
| 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)      1. Activity **CEED** - Change to Closed if no follow-up needed |

### Copy Policy

|  |
| --- |
| Use this workflow when a copy of an entire policy needs to be moved 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 the 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 details 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     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 |

### 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 * A prefill can then be added when a policy is created by clicking the dropdown list then selecting the appropriate prefill option      * Prefills can also be added while in the application (navigation panel is open to the policy form), then clicking **Actions / Select Prefill**. The Service Summary Stage must be - In Process – to perform this action |

### Multi-Year Policies

|  |
| --- |
| * 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 a multi-year commission agreement. Please reach out to your REA **Amy Merrill Rice** 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 is known, enter expiration date as reflected on service contract.   + If a service contract/fee policy type and expiration date is not known, enter expiration date as a one-year term and renew annually until the contract is cancelled.   + This process would be continued until the carrier is no longer collecting annual premiums or is cancelled. |

# Southeast Platform Epic Structure

|  |  |  |  |
| --- | --- | --- | --- |
| **AGENCIES** | | | |
| 1SE | Acrisure Southeast Partners Insurance Services, LLC | | |
| NJV | NHG Specialty LLC | | |
| TUG | Acrisure Southeast Specialty Insurance Agency, LLC | | |
| **BRANCHES** | | | |
| **1SE** | **SE – Beyond FL** | \*\*The following agencies will continue to use their branch code and name. | |
| **2SE** | **SE – Central Florida** |
| **3SE** | **SE – South Florida** |
| **5SE** | **SE - Ohio** |
|  | | | |
| AAP | Adcock-Adock Property & Casualty | JMB | JM Berenguer & Associates |
| ALN | All Lines Insurance Agency | NAV | Navinsure |
| ATS | Atlantic Shield | NJV | NHG Specialty LLC |
| AVS | AV Insurance Services | OCI | Old Colony Insurance |
| BPF | Bradley & Parker of Florida | RH1 | R.H. Benson & Company |
| CGI | CGI Benefits | RKA | RK Asset Management |
| DCI | Daniels Insurance | SVI | Service Insurance Agency |
| DJJ | DJJ Insurance | SMI | Smith Insurance & Bonds |
| FSA | Elemental and FSA Risk | SAH | Spears & Houston Insurance |
| GSA | Gerald Scroggs Insurance Agency | TLC | The LINQ Companies |
| HHI | Humston Holt Insurance Agency | TUG | The Upton Group |
| JB1 | Johnson Brady Insurance Agency | VAR | Varcas Insurance |
| JC1 | Jeff Clark Insurance Agency |  |  |

|  |  |
| --- | --- |
| **1SE SE - Beyond FL** | |
| ***Agencies*** | |
| ACHS | JLP Interests |
| ACHS Lynn Sanders | MC Blair Insurance |
| Benefit Coordinators Inc | Morris Consulting Solutions Book |
| Brett A Virgin | Nicholson Insurance Agency |
| Don Bullard | Palmer-Hampton Agency |
| Emmett Hall Book | PCB Insurance |
| Fiser Insurance Agency | Peachtree Benefit Group |
| Fullerton | PentaRisk Holdings (ATL) |
| GCH Insurance Group | Premier Insurance Consultants of Augusta |
| Head Capital Advisors | Selina Simpson Book |
| Hicks Insurance Agency | Shubert & Associates |
| Insurance Marketing Group | Smith Manus Surety |

|  |  |
| --- | --- |
| **2SE SE - Central FL** | |
| ***Agencies*** | |
| Alltrust Ins | Insurance Seguros of America |
| Bissell & Associates Insurance | Jeffrey A. Persky Book of Business |
| Carl Roberge Book | John Adcock Insurance Agency |
| Citrus Insurance Group | JTR Insurance Strategies |
| COBIA | Keyser Insurance Group (FL) |
| CorePRO Non-Core Book of Business | Labor for Hire Book of Business |
| Crevello Financial Services | Lassiter Ware Insurance |
| Fletcher & Company | Lucy Singer – RRL |
| ForeRunner Insurance Group | RRL Agency |
| Gambrell & Sturges | The Holmes Organisation of FL |
| Gary Robles Book | Thomas Insurance Services |
| Glenn E Martin Insurance | Thompson Bostrom & Assoc |
| Gulfshore Insurance | V&R Insurance |
| Helman & Associates | Versured Personal Lines Book of Business |
| Insurance Resources and Risk Management | Wallace Welch & Willingham |

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| **3SE SE - South FL** | |
| ***Agencies*** | |
| Bryan Hoyo Book | Lucy Singer BOOK - Insource |
| FloodZone | Nielson Group Holdings |
| Frank H. Furman | One Source of Florida Insurance Services |
| Furman Insurance | South Atlantic |
| Global Assurance | Southgate Insurance Agency |
| InSource |  |

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| **5SE SE - Ohio** | |
| ***Agencies*** | |
| Bob Love Book - RRL |  |

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| **DEPARTMENTS** | | |
| PEL | Personal Lines – Large | $1000 Rev + |
| PEM | Personal Lines - Middle | $250-1000 Rev |
| PES | Personal Lines - Small | <$250 Rev |
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| REF | Non-Insurance Referrals | Non-Insurance Products - PEO, ACS, Title Referrals |
| SRV | Services | Revenue (Service Codes) generated from Loss Control, P&C Claims, Consulting HR & Consulting P&C, Compliance Services and other HR/EB services, etc. |
| **PROFIT CENTERS** | | |
| EEA | PL Employee Account |  |
| HNW | PL High Net Worth |  |
| PER | Personal Lines |  |
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| REF | Non-Insurance Referrals | Non-insurance related revenue (ACS referrals, PEO brokering, Payroll Services referrals, etc) |
| RMG | Risk Management Services |  |
| XSC | Acrisure Service Center | HO Use Only |

# EPIC WORKFLOWS

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Description automatically generated

## New Business Workflow

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| **Best Practice:**   * Before adding New Business, make sure to search client through Locate * Add **Prospect** in Epic as soon as Prospect is received * Including Client name(s), addresses, phone numbers, email addresses, and contacts living in the household. * Add notes to the **ADD2** (adding a prospect) or ADD1 (if already bound business) activity - describe who, what, why, etc. - then close the activity successful |

### Add New Client (Prospect or Insured)

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| 1. Click **Locate** 2. Click the **Add** Badge Follow outlinebutton 3. **Add Account**    1. Select the **Individual** radio button    2. Type of Business = **Personal**      1. **Account Information**    1. **Client Type** – Prospect or Insured    2. **Account Source** – Select from the dropdown list **(required field)**    3. **Structure** – Select Agency & Branch from dropdown lists      1. **Contact Information**    1. **Primary Contact**: Enter First Name, Last Name, Date of Birth    2. **Additional Contact**: Enter First Name, Last Name, Date of Birth (if applicable)    3. **Address**: Enter Street Address on first line (address verification tool will find the correct address and a pop-up will alert if any duplicate addresses are found)      1. **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      * 1. Click **+Phone** to add additional phone numbers      1. **Email**    1. Enter **Primary Contact Email** and **contact preferences**      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 as a VIP account)    2. **Relationships** – add related accounts (i.e., account subsidiaries)      1. Click **Save Account**      1. **Activity**: **ADD2** (add Prospect) or **ADD1** (Insured)    1. Defaults closed    2. Add **Notes** (how account was acquired, what has been done for this account thus far, etc.)    3. Click **Finish** 2. **Account Details**    1. Click **Servicing** Tab and enter all applicable staff names within the Servicing Roles |

### Quoting/Marketing/Binding

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| **Best Practice:**   * Quote through Carrier or Broker website or Quoting Software * [EpicQuotes](#_JA._1_Epic) for rating * If an ACORD form(s) is needed utilize [Marketing Lite](#_JA.2__Marketing) |

#### Quoting on Carrier or Broker Website or Quote Software

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| **Add manual activity: (F9) / New > Add Activity**  Create**QNEW** for **each** carrier quoted to document file and save attachments, update Activity with quoted PPE and Quoted Premium in the Amount field.   1. Go to Full Screen Add 2. Enter activity code: **QNEW** (New Business) 3. Enter PPE and Quoted premium 4. Present quotes to the client   **Update Activity When Quote Selected**   * For **binding carrier,** close the **QNEW** for the carrier as successful add final notes. * For **non-binding carriers,** close each **QNEW** as unsuccessful and select reason; add notes   If policy is bound, [Add Policy Shell](#_Add_New_Policy) in Epic |

## Add Policy

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| **Best Practice:**   * Add Policy as soon as policy has been submitted to the carrier for binding * Add Policy prior to download |

### Add New Policy

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| 1. Click **Policies** from the left Navigation Panel 2. Click the **Add** Badge Follow outlinebutton - 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. **Description** – Update Description if needed (ex. Excluding Wind, Location, etc)      * 1. **Policy number** – enter Policy Number or TBD if unknown   2. **Effective/Expiration date**: update as needed   3. **Source** – Choose from the drop down **(Required Field)**   4. **Agency =** * **1SE Acrisure Southeast Partners Insurance Services, LLC** * **NJV – NHG Specialty LLC** * **TUG – Acrisure Southeast Specialty Insurance Agency, LLC**   1. **Branch =** Select from the following branches **unless** the entity you work for is in earnout or must use its legal business name. (If you are unsure of your branch review [Southeast Platform Epic Structure](#_Southeast_Platform_Epic).) * **1SE** – Beyond FL * **2SE** – Central Florida * **3SE** – South Florida * **5SE** - Ohio   1. **Department:** Select the department based on the **account** **revenue** size  |  |  |  | | --- | --- | --- | | **PEL** | Personal Lines - Large | $1,001 Rev + | | **PEM** | Personal Lines - Middle | $250 - $1,000 Rev | | **PES** | Personal Lines - Small | <$249 Rev |  * 1. **Status** = Select **NEW**   2. **Issuing Location** – verify   3. **Bill type**: Select Agency or Direct Bill   4. Select **Profit Center** = Select **PER** **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 dropdown list (Click description header to sort by Name)   6. **Premium Payable Entity** - Select from dropdown list (Click description header to sort by Name)   7. If PPE is a Broker, change **CA** to **BR** and enter broker name from dropdown list     **NOTE: Be sure to select the appropriate PPE Contract if BR is selected**     1. **Line Commission**: 2. If Carrier Commission **is** Known: Enter carrier policy commission percentage. This can be found on the quote or carrier/broker invoice. 3. If Carrier Commission **is NOT** Known: Mark Checkbox **‘Use Commission Agreement’**  * Commission Agreement will Prefill * Verify Selected Agreement – **Policy – ‘Acrisure Estimated Rate’**  1. **Line estimated premium:** Estimate Annual Premium only (no taxes or fees). Enter premium quoted. **Package policies – Estimated Premium MUST be split between each line.** 2. Hit the blue **Calculate** next to Commission and Epic will calculate the commission. 3. Click **Detail**      1. Select **APOL** activity    1. Verify Who/Owner    2. Follow-up/Start Date    3. Add Notes    4. Click **Finish** 2. **IMPORTANT:** Epic will automatically transfer you to tab; if it does not, click **Servicing/Billing > Line** from left Navigation Panel.    1. **Pr/Br** tab **(REQUIRED):** Click the **Add** Badge Follow outlinebutton. If a **Producer** is getting paid commission on a policy, select the **Producer** and click **‘Use Commission Agreement’**. By clicking the box Commission Agreement will automatically fill in **%** of commission.   **DO NOT AMEND COMMISSION % UNLESS APPROVED BY LEADERSHIP**   * **If ‘Use Commission Agreement’ box is not checked an ADC – Agency Defined Category of ‘Commission Agreement Exception’ must be added.**      * 1. Each policy requires at least one **PPAY** (Note: PPAYs are Employees; BPAYs are outside Brokers). \*\*If there is **no** Producer involved select House.   2. Verify **Production Credit** is 100% unless splitting with other Producers. (Note: This is not commission related but gives the Producer credit for booking the business written. **BPAYs** never receive Production Credit). **If House Code – Production Credit will be 100%.**   3. Refer to the [**Pr/Br Commissions Guide**](#_New_Policies)  1. Click **Servicing** tab: Verify Servicing Roles for Producer and Servicer. 2. **For Non-Download Carriers only:** Update Policy Detail with coverage in the left Navigation Panel prior to moving to step 10. 3. Click the **X** on the left Navigation Panel to close out of the policy detail 4. Click Yes, Perform Action > **Update Stage to Submitted**   \*\* If an ACORD form needs to be sent to the carrier, Click Yes, Perform Action > **Submit Application** to generate the ACORD for distribution) click **Finish**. |

#### Policy Received from Carrier

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| **DOWNLOAD:**   * Downloaded policies will automatically update policy stage to **Issued** with the policystatus **- NEW.** * **ZNEW** activity will generate and is set to close automatically * Review **Daily Download Report** to view downloads received and the **Download Audit Report** to update policy/client record with missing information.   **Policy Check for Downloaded and Non-Downloaded Policies:**   1. **Policy Check for Accuracy –** Add additional notes in **APOL, MQS** or **BND1** activity or if additional activity is needed, manually create **PPCK** Activity (F9 or NEW > Activity); reassign to Third-Party Vendor or Processor. 2. Verify notes in **APOL, MQS** or **BND1** activity and verify policy change from carrier to ensure it was completed as requested.  * If Policy is **NOT** accurate, leave activity open for follow up; send to carrier or account servicer for correction. * If Policy is **Correct**, add notes in activity and close the **APOL, MQS** or **BND1** activity  1. If **(PPCK)** activity is open for Third-Party Vendor/Processor – verify notes and close activity. 2. Download will update the service summary row and **Issue** the policy 3. Attach policy renewal documents to the **APOL, MQS** or **BND1** activity in Epic (if not already attached as eDoc download)   **Non-Downloaded Policies:**   1. Double click on policy 2. Click **Servicing/Billing** > **Line**; update **Line Estimated Premium** per line 3. From policy, click **Actions > Issue/Not Issue Policy** 4. Verify effective date of change and other details 5. Issue 6. If activity was not closed in Policy Checking; Click **Close Open Activities** tab: Add note if needed; Update the **APOL** or **BND1** activity status as Closed Successful; click **Finish**   ***\*\*Manual Policy Check Activity PPCK – Create Manual Activity to Check for Accuracy – reassign Who/Owner to Policy Servicer/Account Manager or Third-Party Vendor. PPCK activity has Tasks specifically for Policy Checking.***  **\*Send Welcome Letter to Client**  [Issue EPIC Auto ID Cards](#_EPIC_Auto_ID)  [Issue Evidence of Property Insurance](#_EPIC_Evidence_of)  For Agency Billing Questions & Accounting Activities see [SharePoint](https://acrisure.sharepoint.com/:w:/s/ACR-ABSAccountingTeam/ESAdZgcBwPdJt0_n5-hNILkBueeqZpQWrGK6rg54rr9l7g?e=4LVSdM&clickparams=eyJBcHBOYW1lIjoiVGVhbXMtRGVza3RvcCIsIkFwcFZlcnNpb24iOiI0OS8yMzExMzAyODcyNCJ9) for Platform Activity Guide |

### Add BOR Policy

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| **Best Practices**   * If Broker of Record Policy is confirmed in advance, enter manual activity **PBFO** to add notes and attach documents. Follow Add BOR Policy workflow below 60 days prior to effective date. * If Broker of Record Policy is being serviced or accepted from the carrier immediately; follow the Add BOR Policy workflow below. * Add manual activity **PARV** to conduct full review, coverage discussion and discuss any necessary corrections and/or recommendations * **Documents and Procedure to Follow:** * AOR/BOR signed by insured and attached to activity * Any applicable forms (UM, PIP, etc) signed by insured and attached to **BORP** activity |

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| Follow [Add Account Workflow](#_Add_New_Account) for new clients or if existing client locate Client Account.  1. Click Policies from the Navigation Panel 2. Click the **Add** Badge Follow outlinebutton - Select whether the policy is Prospective or Contracted 3. Enter Policy Type from dropdown list 4. Change Policy Description as needed 5. Enter policy number if known or TBD 6. Verify the following:    1. **Effective and expiration dates** (defaults to system date and one year term)    2. **Source:** choose from the dropdown **(required field)**    3. **Structure**: Verify Agency, Branch, Department    4. **Lines of Business**:    5. Policy Line    6. Status = **BOR**    7. Select Profit Center    8. [Issuing Company](#_Select_the_Correct)    9. [Premium Payable Company](#_Select_the_Correct_1). If PPE is a Broker, change **CA** to **BR** and enter broker name from dropdown list    10. Add Carrier Commission percentage or check box to use agreement    11. Click **Detail**    12. Select **BORP** activity    13. Add detailed notes (leave open for follow up on receipt of policy) - click **Finish**. 7. Complete:    1. **PR/BR Tab:** Enter PR/BR name from dropdown list if area is not defaulted.    2. **Servicing Tab:** Enter Policy Producer and Policy Servicer    3. **Billing Tab:** Verify Invoice information and delivery method    4. **Line Tab:** Enter Estimated Premium and Estimated Commission if known 8. Follow Steps for [Policy Received from Carrier](#_Policy_Received_from) above. 9. After Policy Checking is Complete, close out **BORP** activity with detailed notes and attach final documents to the **BORP** activity. |

## Renewal Policy Workflow

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| **Best Practices**   * Review upcoming renewal list **30, 60, 90 days** in advance depending on policy (or use [Renewal Manager](#_JA.4_Renewal_Manager)) or Expiration Report * If manual activity is needed for Downloaded or Non-Downloaded Renewal Review or Pre-Renewal Process add manual activity **PLRR - PL – Renewal Review** |

### Downloaded Renewals

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| * Downloaded policies will automatically renew. The new term will be Issued, and the **status updated to REN.** * **ZREN** automatic closed activity * Review **Daily Download Report** to review downloads received and the **Download Audit Report** to update policy/client record with missing information. * If Separate Policy Check Activity is needed for accuracy – Add Open **PPCK** Activity to Third-Party Vendor or Account Manager * **eDoc** attached (depending on carrier) |

### Non-Downloaded Renewals

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| * 1. Receive renewal from carrier   2. Select Policy in Epic   3. Click **Actions > Renew**   4. Review policy details (policy number, effective/expiration dates, etc.)   5. Policy Status will automatically update to **REN for Renewal**   6. Click **Detail**   7. Select **RPOL**Activity - add notes, update follow up and status of activity.   8. Click **Finish**   9. From left Navigation Panel - update policy detail ACORD form (if needed based on renewing term) * If Policy has been Issued - Close Policy detail > Update **Stage to Issued** * If Policy has been submitted for Binding – Close Policy Detail > Update **Stage to Submitted**  1. Attach carrier dec pages to the **RPOL** Activity 2. Policy Check for Accuracy – **RPOL** Activity or Create Manual **CPCK** Activity; activity can be reassigned to Policy Checker. 3. If Renewal is complete and no follow up is needed close **RPOL** activity 4. If Renewal is not complete and follow up is needed leave **RPOL** activity open 5. Send copy to client with form letter if not sent by carrier   [Issue EPIC Auto ID Cards](#_EPIC_Auto_ID)  [Issue Evidence of Property Insurance](#_EPIC_Evidence_of)  For Agency Billing Questions & Accounting Activities see [SharePoint](https://acrisure.sharepoint.com/:w:/s/ACR-ABSAccountingTeam/ESAdZgcBwPdJt0_n5-hNILkBueeqZpQWrGK6rg54rr9l7g?e=4LVSdM&clickparams=eyJBcHBOYW1lIjoiVGVhbXMtRGVza3RvcCIsIkFwcFZlcnNpb24iOiI0OS8yMzExMzAyODcyNCJ9) for Platform Activity Guide |

## Rewrite Policy Workflow

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| **Best Practices**   * Remarket through Carrier or Broker website or Quoting Software * Remarket to carriers via [EpicQuotes](#_JA.1_Epic_Quotes) for rating * If ACORD form(s) are needed utilize [Marketing Lite](#_JA.2__Marketing) * When Rewriting a policy, it is **required** to create a policy shell to ensure the downloaded policy comes through properly. The below steps must be done **within 24 hours** of binding the policy with the carrier. Confirm Policy Status is **REW** – Renewal - Rewrite * Review upcoming Expiration Renewal list **30 days** in advance (or use [Renewal Manager](#_JA.3_Renewal_Manager)) * If expiring carrier has already downloaded a renewal and policy and policy is remarketed to a new carrier follow the Cancellation Workflow to cancel the downloaded renewal flat with **CREW** activity code. |

### Quote/Remarket on Carrier or Broker Website or Quote Software

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| **Add manual activity: (F9) or New > Activity**  Create**QREW** for **each** carrier quoted to document file and save attachments; update Activity with quoted PPE and Quoted Premium in the Amount field.   1. Go to Full Screen Add 2. Enter activity code: **QREW** (Rewrite Business)        1. Enter PPE and Quoted premium 2. Present quotes to the client   **Update Activity When Quote Selected**   * For **binding carrier,** close the **QREW** for the carrier as successful add final notes. * For **non-binding carriers,** close each **QREW** as unsuccessful and select reason; add notes |

**Remarket Downloaded Policies:**

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| |  | | --- | | **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 cancelled flat.**  **Copying the policy instead of renewing it will make sure the Rewritten policy is downloaded correctly. Confirming the expiring carrier renewal download is cancelled will remove the policy from Expiration and Potentially Missed Renewal reports.** |   If Remarketed Policy **Downloads:**   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 dropdown 14. Issuing Company/Premium Payable 15. **Line Commission –** Enter carrier commission percentage if known  * **If Commission is Unknown –** * Check the box to use commission agreement * Select the policy type with **Acrisure Estimated Rate** in the dropdown   **A screenshot of a computer screen  AI-generated content may be incorrect.**   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 Producer & Commission % - click ‘Use Commission Agreement’ box do not amend %.  1. Click the **X** on the left Navigation Panel to close out of Policy Detail 2. If Policy has been Submitted to the Carrier for binding – Close Policy Detail > **Update Stage to Submitted** 3. Click **Finish** 4. If Activity is needed for following up policy issuance, utilize **PLRR** activity. 5. When **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) to cancel the downloaded renewal flat. Policy status of **CRW – Cancelled – Rewritten** and utilize the **CREW** activity code if needed. |

**Remarket Non-Downloaded Policies:**

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| If Remarketed Policy **Does NOT Download:**   1. Select **EXPIRING** policy term 2. Click **Actions > Renew 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 dropdown 14. Issuing Company/Premium Payable 15. **Line Commission** - Enter Carrier Commission Percentage – this can be found on the quote or carrier/broker invoice.  * **If Commission is Unknown -** * Check the box to use commission agreement * Select the policy type with **Acrisure Estimated Rate** in the dropdown   **A screenshot of a computer screen  AI-generated content may be incorrect.**   1. Click **Detail** 2. Select **RPOL** Activity – Update Description (if needed), add notes, update follow date for follow up. 3. Policy Opens - Click **Servicing/Billing > Line** on left Navigation Panel 4. **Servicing** tab – Verify required Servicing Contacts 5. **Pr/Br Commissions** tab –  * Verify Producer & Commission % - click ‘Use Commission Agreement’ box do not amend %.  1. Update any **Policy Detail/Application Coverages** on left Navigation Panel for Line(s) of Business. 2. Click the **X** on the left Navigation Panel to close out of Policy Detail 3. If Policy is still In Process for additional data entry; leave stage **‘In Process’** 4. If Policy has been Submitted to the Carrier for binding – Close Policy Detail > Yes, perform action: **Update Stage to Submitted** 5. If Policy has been Issued by the Carrier – Close Policy Detail > Yes, perform action: **Issue/Not Issue Policy** 6. Click **Finish** |

#### Policy Received from Carrier

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| **Downloaded Policies:**   * Review **Daily Download Report** to view downloads received and the **Download Audit Report** to update policy/client record with missing information. * Downloaded policies will automatically update policy stage to Issued * **Download** activity will generate and is set to close automatically   **Policy Check for Downloaded and Non-Downloaded Policies:**   1. **Policy Check for Accuracy –** Add additional notes in **PLRR, RPOL, MQS** or **BND1** activity or if additional activity is needed, manually create **PPCK** Activity (F9 or NEW > Activity); reassign to Third-Party Vendor or Processor. 2. Verify notes in **PLRR, RPOL, MQS** or **BND1** activity and verify policy change from carrier to ensure it was completed as requested.  * If Policy is **NOT** accurate, leave activity open for follow up; send to carrier or account servicer for correction. * If Policy is **Correct**, add notes in activity and close the **PLRR, RPOL, MQS** or **BND1** activity  1. If **(PPCK)** activity is open for Third-Party Vendor/Processor – verify notes and close activity. 2. Download will update the service summary row and **Issue** the policy 3. Attach policy to the **PLRR, RPOL, MQS** or **BND1** activity in Epic (if not already attached as eDoc download)   **Non-Downloaded Policies:**   1. Double click on policy 2. Click **Servicing/Billing** > **Line**; update **Line Estimated Premium** per line 3. From policy, click **Actions > Issue/Not Issue Policy** 4. Verify effective date of change and other details 5. Issue 6. If activity was not closed in Policy Checking; click **Close Open Activities** tab: Add note if needed; Update the **RPOL** activity status as Closed Successful; click **Finish**   [Issue EPIC Auto ID Cards](#_EPIC_Auto_ID)  [Issue Evidence of Property Insurance](#_EPIC_Evidence_of)  For Agency Billing Questions & Accounting Activities see [SharePoint](https://acrisure.sharepoint.com/:w:/s/ACR-ABSAccountingTeam/ESAdZgcBwPdJt0_n5-hNILkBueeqZpQWrGK6rg54rr9l7g?e=4LVSdM&clickparams=eyJBcHBOYW1lIjoiVGVhbXMtRGVza3RvcCIsIkFwcFZlcnNpb24iOiI0OS8yMzExMzAyODcyNCJ9) for Platform Activity Guide |

## 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. * Policy check (Create **CPCK** manual activity) or reassign existing **CHGE** activity to policy checker or Third-Party Vendor/Workgroup * **If/when there is a Marketing Representative, be sure to communicate any changes to the policy.** |

### Process Change Request (Existing Line)

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| 1. Receive policy change request from client 2. In Epic – **Actions > Endorse/Revise Existing Line;** enter:    1. Effective date of change    2. Description of change    3. Click **Detail**    4. Select **CHGE** Activity    5. Add detailed notes:  who called, what did they ask for, your responses or direction, etc.    6. Click **Finish**   **Downloaded policies**:   1. Click the **X** on the left Navigation Panel 2. Click Yes, Perform Action: **Update Stage to Submitted** 3. Process changes on carrier website 4. Attach bind confirmation, emails with client/carrier, etc. to the **CHGE** activity 5. Attach actual policy dec endorsement to the **CHGE** activity in Epic   **Non-Downloaded Policies Requiring an ACORD Change Request:**   1. Update ACORD detail in Epic to include the change requested. 2. Click the **X** on the left Navigation Panel to close out of the policy detail 3. Click Yes, Perform Action > **Submit Change Request** 4. Click **Finish** 5. Prepare ACORD Form - Submit Change Request > Confirm and Update tab(s)    1. Update Detail tab with Underwriter name (if specific)    2. Confirm Line(s) of Business – if more than one line, both have to be submitted.    3. Confirm Forms/Attachments    4. Add Additional Remarks in **Remarks** tab if applicable.    5. Confirm Organization Contact    6. **Distribution** tab —select Email via the dropdown box and complete the applicable detail.    7. Choose **Download & Print** if a Preview Copy is needed. 6. Click **Finish** 7. ACORD form change has been emailed to underwriter/carrier and automatically attached at policy level.    1. Go to Attachment > Right Click > Edit Attachment Details    2. Click (+) Add to **CHGE** Activity 8. Leave Activity Open for follow up.   **Non-Downloaded Policies Not Requiring an ACORD Change Request:**   1. Update ACORD detail in Epic to include the change requested. 2. **Actions > Update Stage to Submitted.** 3. Click **Finish** 4. Email change to carrier or upload to carrier website. 5. Attach email/change request to the **CHGE** activity. 6. Leave Activity Open for follow up.   ***\*\*Manual Policy Check Activity PPCK – Create Manual Activity to Check for Accuracy – reassign Who/Owner to Policy Servicer/Account Manager or Third-Party Vendor. PPCK activity has Tasks specifically for Policy Checking.*** |

#### Endorsement Received from Carrier

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| **Downloaded Policies:**   * Review daily download list – review download audit report and update missing information * Download will update the service summary row and **Issue** the endorsement   **Policy Check for Downloaded and Non-Downloaded Policies:**   1. **Policy Check for Accuracy –** Add additional notes in **CHGE** activity or if additional activity is needed, manually create **PPCK** Activity (F9 or New > Activity); reassign to Third-Party Vendor or Processor. 2. Verify notes in **CHGE** activity and verify policy change from carrier to ensure it was completed as requested.  * If Endorsement is **NOT** accurate, leave activity open for follow up; send to carrier or account servicer for correction. * If Endorsement is **Correct**, add notes in activity and close the **CHGE** activity  1. IF **(PPCK)** activity is open for Third-Party Vendor/Processor – verify notes and close activity. 2. Download will update the service summary row and **Issue** the endorsement 3. Attach policy endorsement to the **CHGE** activity in Epic (if not already attached as eDoc download)   **Non-Downloaded Policies:**   1. Double click on policy 2. Click **Servicing/Billing** > **Line**; update **Line Estimated Premium** to show the Additional or Return Premium. (Example – Current premium is $4,000; a chance was made increases premium by $400. Change Line Estimated Premium to $4,400) 3. From policy, Click **Actions > Issue/Not Issue Endorsement** 4. Verify effective date of change and other details 5. Issue 6. If activity was not closed in Policy Checking; Click **Close Open Activities** tab: Add note if needed; Update the **CHGE** activity status as Closed Successful; click **Finish**   **Issue Proofs:**  [Issue EPIC Auto ID Cards](#_EPIC_Auto_ID)  [Issue Evidence of Property Insurance](#_EPIC_Evidence_of)  For Agency Billing Questions & Accounting Activities see [SharePoint](https://acrisure.sharepoint.com/:w:/s/ACR-ABSAccountingTeam/ESAdZgcBwPdJt0_n5-hNILkBueeqZpQWrGK6rg54rr9l7g?e=4LVSdM&clickparams=eyJBcHBOYW1lIjoiVGVhbXMtRGVza3RvcCIsIkFwcFZlcnNpb24iOiI0OS8yMzExMzAyODcyNCJ9) for Platform Activity Guide  ***\*\*Manual Policy Check Activity PPCK – Create Manual Activity to Check for Accuracy – reassign Who/Owner to Policy Servicer/Account Manager or Third-Party Vendor. PPCK activity has Tasks specifically for Policy Checking.*** |

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

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| **Best Practices**   * This process should only be followed if we are adding an additional Line of Business to a policy Mid-Term. Add **Line Mid-Term** may include adding a watercraft, scheduled jewelry, umbrella, etc. as an additional line of business to existing policy with **same policy number**. * When Endorsing a policy, the ***ACTIONS>Endorse/Revise Add Line Mid-Term*** workflow is **required** to generate a detailed service summary row and to ensure the download comes through properly. The below steps must be done **within 24 hours** of binding the endorsement. |

|  |
| --- |
| 1. Receive policy change request from client 2. In Epic – Select/Highlight Policy 3. Click **Actions > Endorse/Revise Add Line Mid-Term;** enter:    1. Effective date of change    2. Description of change    3. Click **Add** Badge Follow outline 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 or check box to use agreement    7. Click **Detail**    8. Select **CHGL** Activity    9. Add detailed notes:  who called, what did they ask for, your responses or direction, etc.; click **Finish**   **Downloaded Policies:**   1. Process change on carrier website 2. Attach bind confirmation, emails with client/carrier, etc. to the **CHGL** activity 3. Click the **X** on the left Navigation Panel to close out of 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 change to carrier    1. Attach email/change request to the **CHGL** activity    2. Leave Activity Open for follow up 3. Click the **X** on the left Navigation Panel – Yes, Perform Action **Update Stage to Submitted** |

#### Endorsement Received from Carrier

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| **Downloaded Policies:**   * Review daily download list – review download audit report and update missing information * Download will update the service summary row and **Issue** the endorsement   **Policy Check for Downloaded and Non-Downloaded Policies:**   1. **Policy Check for Accuracy –** Add additional notes in **CHGL** activity or if additional activity is needed, manually create **PPCK** Activity (F9 or New > Activity); reassign to Third-Party Vendor or Processor. 2. Verify notes in **CHGL** activity and verify policy change from carrier to ensure it was completed as requested.  * If Endorsement is **NOT** accurate, leave activity open for follow up; send to carrier or account servicer for correction. * If Endorsement is **Correct**, add notes in activity and close the **CHGL** activity  1. If **(PPCK)** activity is open for Third-Party Vendor/Processor – verify notes and close activity. 2. Download will update the service summary row and **Issue** the endorsement 3. Attach policy endorsement to the **CHGL** activity in Epic (if not already attached as eDoc download)   **Non-Downloaded Policies:**   1. Double click on policy 2. Click **Servicing/Billing** > **Line**; update **Line Estimated Premium** to show the Additional or Return Premium. (Example – Current premium is $4,000; the change was made increases premium by $400. Change Line Estimated Premium to $4,400) 3. From policy, Click **Actions > Issue/Not Issue Endorsement** 4. Verify effective date of change and other details 5. Issue 6. If activity was not closed in Policy Checking; Click **Close Open Activities** tab: Add note if needed; Update the **CHGL** activity status as Closed Successful; click **Finish**   **Proofs:**  [Issue EPIC Auto ID Cards](#_EPIC_Auto_ID)  [Issue Evidence of Property Insurance](#_EPIC_Evidence_of)  For Agency Billing Questions & Accounting Activities see [SharePoint](https://acrisure.sharepoint.com/:w:/s/ACR-ABSAccountingTeam/ESAdZgcBwPdJt0_n5-hNILkBueeqZpQWrGK6rg54rr9l7g?e=4LVSdM&clickparams=eyJBcHBOYW1lIjoiVGVhbXMtRGVza3RvcCIsIkFwcFZlcnNpb24iOiI0OS8yMzExMzAyODcyNCJ9) for Platform Activity Guide  ***\*\*Manual Policy Check Activity PPCK – Create Manual Activity to Check for Accuracy – reassign Who/Owner to Policy Servicer/Account Manager or Third-Party Vendor. PPCK activity has Tasks specifically for Policy Checking.*** |

## Cancel Policy Workflow

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| **Best Practice**   * Received Cancellation Request from Insured or Cancel Policy to Rewrite * Start the Cancellation Process in EPIC * You will choose either **CPOL** (Lost Business) or **CREW** (Rewrite coverage Mid-Term or Renewal) * Make sure to document your appropriate activity. * When completed, close **CPOL** as **Unsuccessful** and **CREW** as **Successful** |

### Cancel Policy

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| --- |
| 1. Locate Account 2. Select Policy 3. Click **Actions > Cancel** 4. Select Policy Release 5. Enter Effective Date of Cancellation 6. Enter a description 7. Click **Detail**    * Activity: **CPOL-** Add notes (who, what, where, when how) or **CREW** if rewriting with a new carrier    * Click **Finish** 8. From the left Navigation Panel, enter Reason/Method, Additional Interest, and Remarks as needed. 9. Click the **X** on the left Navigation Panel to exit policy 10. To generate the Lost Policy Release, click **Print > Cancellation** 11. Select **Attach without Distributing** 12. If utilizing [DocuSign](#_JA.5_DocuSign_Integration) > From Attachments, right click on the LPR and select **send to eSignature** 13. If utilizing Indio > Save Cancellation as PDF and upload to Indio |

#### Signed LPR Received:

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| 1. Once Signed Cancellation/LPR has been received 2. Add notes to the **CPOL** or **CREW** Activity 3. **Submit Cancellation request through Carrier Website or Email**    * Enter cancellation on carrier website or right click on attachment **Send Via Email** to Carrier    * Select Policy and **Actions** > **Update Stage to Submitted**    * Click **Finish** |

#### Cancel Confirmation Received from Carrier

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| **Download Policies:**   * Review Download Report and/or open **ZCAN** or **ZNON** Activity * Download will automatically update the: * Service Summary Stage to **Cancelled** * Expiration Date of Policy * Policy Status to **Cancelled (Renewal)** * Policy Status will need to be verified: From the left Navigation Panel click Servicing/Billing > Line and update the **Policy Status** to**:** * **Cancelled – CNW or CRN** (select based on original status) * **Cancelled – Rewritten – CRW** (Cancel/Rewrite) * If **Lost Policy** - * If there **is** a **CPOL** activity – Close as **Unsuccessful** and select reason; add notes and click **Finish**. Close the **downloaded** activity as **Successful** to prevent duplication. * If there is **not** a **CPOL** and only a **ZCAN** / **ZNON** activity – Close as **Unsuccessful** and select reason; add notes and click **Finish**. * If **Rewritten Policy** – * Close the **CREW** / **ZCAN / ZNON** activity as Successful; add notes and click **Finish**.   **Non-Download Policies:**   1. Select Policy then **Actions** > **Issue Cancellation** – verify details 2. Policy Status will need to be verified: From the left Navigation Panel click Servicing/Billing > Line and update the **Policy Status to:**  * **Cancelled – CNW or CRN** (select based on original status) * **Cancelled – Rewritten – CRW** (Cancel/Rewrite)  1. Click the **Close Open Activity** tab and close the **CPOL** activity as **Unsuccessful** or **CREW** activity as Successful add notes, click **Finish**. 2. Attach Cancellation Confirmation to **Activity**. |

### 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 cancelled; click **Actions > Cancel** 3. If the client’s signature is required on a Lost Policy Release form, select Policy Release, otherwise, select Cancellation Request 4. Enter Effective Date of cancellation 5. Enter description as to why cancelling 6. **Uncheck all lines NOT being cancelled** and **check only the line that IS being cancelled** 7. Click **Detail** 8. Select **CPOL Activity** - change Description to reflect only the one line in the package policy being cancelled    1. Activity = Keep open for follow-up on receipt of cancel confirmation/endorsement from the carrier    2. Add notes as to why cancelling    3. Click **Finish** 9. Once Received Confirmation Line has been Cancelled - Follow [Cancel Confirmation Received from Carrier](#_Cancel_Confirmation_Received) |
| **\*Important Notes:**   * **The Cancellation status will only show on the Service Summary Line of the policy to be cancelled. 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 cancelled line so it will not be included in the package policy renewal term.** |

### Notice of Cancellation for Non-Payment

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| **Notice of Cancellation for Non-Payment Received**   1. When NOC for Non-Payment is received, go to Policies area in the Client’s account 2. Click **Policies** in the left Navigation Panel 3. Highlight the policy in question from the policy list view 4. Click the **New** button in the top blue options bar and select Activity (or press F9) 5. Select **PCN2** activity      1. Update the Follow-up/Start date to the Date of Cancellation 2. Add Notes 3. Click **Detail** 4. Drag and Drop the Pending Cancel notice into this activity 5. Update the Attach To description in accordance with your Platform’s document [naming conventions](#_JA.9***CONFIRM_Attachment_Naming)      1. Click **Finish** 2. Follow appropriate steps below based on whether the client did or did not make payment    1. If client makes payment by the due date, drag & drop the carrier Rescind Notice to the open PCN2 activity on the Home Base. Update the description according to the Platform’s [naming conventions](#_JA.9_Attachment_Naming). Add to folder as needed.       1. Right click on the activity and select Close       2. Mark as **Successful**       3. Add Final note (i.e., Payment received – cancel notice rescinded)       4. Click **Finish**    2. If client does not make payment by the due date, drag & drop the carrier Final Cancel Notice to the open PCN2 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.       1. Right Click on the activity, select Close       2. Mark as **Unsuccessful**       3. Add Final note (i.e., Payment not received by due date – carrier cancelled)       4. Click **Finish** |

## Policy Not Renewed Workflow

### Mark Policy as Not Renewed

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| * With the policy highlighted, press F9 (or click **NEW > Activity**) and select the **GNRN** Activity; add notes as to why the policy not renewed.   **Download Policies:**   * Review **Download Report** and/or open **ZCAN** or **ZNON** Activity * Download will **automatically** update the: * Service Summary Stage to **Cancelled** * Policy Status to **Cancelled (Renewal)** * Verify policy status: From the left Navigation Panel click Servicing/Billing > Line and update the **Policy Status** to represent the following:   If **Lost Policy/Coverage Not Replaced** –   * Update policy status to **Not-Renewed – X-N or X-R** (select based on original status) * If there **is** a **GNRN** or **CPOL** activity – Close as **Unsuccessful** and select reason; add notes and click **Finish**. Close the **downloaded** activity as **Successful** to prevent duplication.   **Non-Download Policies:**   * From the client’s account, click **Policies** from the left Navigation Panel * Double click the policy * Verify policy status: From the left Navigation Panel click Servicing/Billing > Line and update the **Policy Status** to represent the following:   If **Lost Policy/Coverage Not Replaced** –   * Update policy status to **Not-Renewed – X-N or X-R** (select based on original status) * If there **is** a **GNRN** or **CPOL** activity – Close as **Unsuccessful** and select reason; add notes and click **Finish**. |

## Policy Reinstated Workflow

### Reinstate Policy

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Download:**   |  | | --- | | **Download will automatically amend your policy/line status to Renewal. If the original policy status was other than Renewal, status will need to be updated appropriately.**  **If a policy status is Cancelled, it will NOT show up on your expiration reports or create system generated renewal activities.** |      * Review **Download Report** and/or open **ZREI** or **ZRNR** activities. * Download will **automatically** update the: * Service Summary Stage to **Reinstated** * Expiration date to the original **Expiration Date** * Policy Status to **REN** - **Renewal** * Policy status will need to be verified: from left navigation panel click **Servicing/Billing > Line** and update the policy status to the appropriate “New” or “Renewal” option:  |  |  |  |  | | --- | --- | --- | --- | | **NBR** | New - BOR | **REN** | Renewal | | **NEW** | New | **REW** | Renewal – Rewrite (First renewal w/new carrier) | | **NX1** | New – Cross Sell – Under 10K | **RX1** | Renewal – Cross Sell – Under 10K | | **NX2** | New – Cross Sell – Over 10K | **RX2** | Renewal – Cross Sell – Over 10K |  * Mark task on **ZREI** or **ZRNR** as completed and close Activity as **Successful**, add notes and click Finish * If closed, reopen the **ZCAN / ZNON**Activity and close as **Successful**; add notes and click Finish. * If there is an original closed **CPOL or CREW** Activity; Reopen Activity, then close as **Successful**; add notes and click Finish.   **Non-Download:**   * From the client’s account, click Policies from the left Navigation panel * Select the **CANCELLED** policy to be reinstated * Click **ACTIONS > Reinstate** * Enter date the policy was reinstated * Add Description * Click **Finish** * Activity = **REIN**: Add detailed notes as to why the policy was reinstated   + Close Activity Successful; click **Finish** * Verify the Policy Status was updated correctly per the original Policy Status * If there is an original closed **CPOL** Activity; Reopen **CPOL** Activity then Close as Successful |

## Client Contracts/Services Workflow

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| 1. Locate Client Account 2. On the left Navigation Panel, click **Client Contracts** 3. Click **Services** 4. Click **Add** Badge Follow outline button 5. Select a **Service Code** from the dropdown menu  |  |  |  | | --- | --- | --- | | **CODE** | **DESCRIPTION** | **DEPARTMENT** | | \*FLP | PL Fee in Lieu of Commission | PEL, PEM, PES |  1. Enter Contract number, if applicable  ***NOTE: When adding a New Service and including billable fees where there is no policy association, be sure to add #NEW in the Contract Number field*** 2. Enter Description of the Service provided 3. Enter term of service from the dropdown menu, and the inception and expiration dates 4. If Monthly Fee Installment is Consistent – Set up Term of Service as Annual 5. **Be sure to enter the correct Agency/Branch & Department** 6. Click **Detail** 7. **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 8. Add Type of Fee (Flat or Hourly) 9. Enter contracted fee / contracted hours as needed 10. Click the **Association** tab: Click **Add** Badge Follow outline associate this service with existing client policy(ies) 11. Click the **Itemizations** tab: Click **Add** Badge Follow outline   - Enter description of service  - Name of person who provided the service  - Account Contact  - Mileage (if applicable)  - Hours of service provided  - Hourly rate  - Calculate total   1. Click the **Servicing** Tab: 2. Enter Policy Producer & Policy Servicer 3. Click the **PR/BR Commissions** Tab:    * Click **Add** Badge Follow outlinebutton if someone will be receiving commission on the service fee and enter their percentage of commission and production credit 4. Click Attachments from the Navigation Panel and click the **Add** Badge Follow outlinebutton to add any attachments associated with the service (i.e., Service Contract, etc.) 5. When finished, close the Service from the Navigation Panel 6. Create Manual Activities that corresponds with Client Contract/Service  * Highlight Service > Click F9 to add Manual Activity  1. Create Accounting Activity to get Service Invoiced |

## Claims Workflow

### Add New Claim

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| 1. Locate Account 2. Locate Policy 3. Click **New** Claim    * When receiving **claims download**, enter data in required fields only. Download will populate claims details.    * If **NOT receiving claims download**, enter all detail in all fields manually. 4. Add Date of Loss, Reported by, Claim Description, Date reported, Reported to 5. Add Risk by selecting lookup button (ie Location, Subject, Vehicle, Driver, Hazards etc) and Sub risk 6. Add Claim type 7. Click **Detail** 8. **ACLM** Activity – leave open for follow up.    * Add notes (who, what, where, when, how, why, etc.) - Click **Finish**. 9. Click all screens in the Navigation Panel to enter claim details 10. Click the **X** in the left Navigation Panel to close out of claim detail 11. To **Issue a Loss Notice**, highlight the claim; click **Actions > Issue Loss Notice**  * Click the **Distribution** tab * Select Contact (use lookup button to locate) * Select Via (Print, Email) and enter additional details * Click **Finish**  1. Attach all claims documentation to the **ACLM** Activity |

#### Claim Updates

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| 1. Double click the Claim to open the left Navigation 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 Navigation Panel to close out of 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**   Example -  ***Assignment of claim***  ***Submitted claim to carrier via XXXX***  ***Notified insured that claim was reported to Carrier*** |

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

|  |
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| 1. Select Claim 2. Click **Actions > Close Claim**; add close date, click **Finish** 3. With the claim highlighted, click **Access > Activity – Open Activities**    * Select the open **ACLM** Activity    * Add notes    * Mark as **Closed – Successful** 4. Click **Finish** |

### Add RECORD ONLY Claim – Filing Claim through Other Party

|  |
| --- |
| 1. Locate Account 2. Locate Policy 3. Click **New** Claim 4. Add Date of Loss, Reported by, Claim Description, Date reported, Reported to 5. Click **Record only** 6. Add Risk by selecting lookup button (ie Location, Subject, Vehicle, Driver, Hazards etc) and Sub risk 7. Add Claim type 8. Click **Detail** 9. **ACLM** Activity – leave open for follow up.    * Add notes (who, what, where, when, how, why, etc.) - Click Finish. 10. Click all screens in the Navigation Panel to enter claim details 11. Click the **X** in the left Navigation Panel to close out of claim detail |

## Claim Details

|  |
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| * **Servicing Section**   + If adding an older claim, confirm current Account Producer and Servicer are selected.   + In Policy Other, enter the name of the Claims Advocate who will be assigned to the claim * **Insured/Contact Section**   Identification Section:   * Insured Location Code – Enter Location Code (if applicable) * Report Purpose Code – Enter Claimant Name * Jurisdiction – Enter State * **Insured / Contact Section:** * Insured Tab – Confirm Correct Insured is selected * Contact Tab – Click on Magnifying glass and select Insured Claim Contact * If contact not listed, add information manually * Authority Contacted – Enter Police Report data on this tab (if applicable) * **Litigation Section (if applicable)** * Add Case #, Court and Date Served * **Additional Parties Section** * Add all parties to claim here and they will pull to other sections of the Loss Notice * Claimant, GC, Subcontractor, Driver, Injured parties, Witnesses, etc. * **Continue to Coverage Section (Line of Business in BOLD beneath Payments/Expenses)**   *\*Note: Only complete this section if it is relevant to reporting the claim. If an incident report or DWC-1 form is available to send to carrier or claim has already been reported, no need to complete the detail in this section.*   * **Loss Section** – Add and/or confirm loss location and description \*   *\*Description on Acord Loss Notice pulls from this section and does not auto update if Claim Summary is updated.*   * **Policy Section** – Verify coverage / deductibles are correct (View Policy Detail) * **Injured** – Complete if any injured parties. * **Property Damaged** – Complete for Owner of Property and note what was damaged. * **Witnesses** – Add any witnesses * **Remarks** – Add any additional information on claims * If to be printed on form with claim notice, check the box ‘Print on Form’ |
| Add Attachment |

# JOB AIDS

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Description automatically generated

# JA. 1 Epic Quotes

|  |
| --- |
| Epic Quotes is a Personal Lines rater used for quoting New and Remarket Business. |

## Available Carriers by State

1. Use this Interactive Map for available carriers
   1. A map of the united states

      Description automatically generated<https://cast.semcat.net/pub/carrier_state_map>

## User Configuration

1. Select **Configure** from left Navigation panel
   1. Select **Quotes** from left Navigation panel
   2. Select **Quotes Setup Personal**

* Data Prefills are available depending on what tab you are on in Epic Quotes
* Proposals template is configured automatically



### Carriers Tab

1. **State Selection -** Set up automatically; if you are missing a state you write business in, reach out to your REA
2. **Available Carrier Websites -** Click **Add** for all carriers that you have login credentials which will add them to **Your Carrier Websites**

### Credentials Tab

1. Select/Highlight the first carrier to add your login credentials
   1. Click the **(+)** to add Type, Nickname, User ID and Password
      1. Click **Add**
   2. Click the **(+)** to enter Agent/Producer code for carrier
      1. Click **Add**

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AI-generated content may be incorrect.

1. Repeat for each carrier listed

### Quoting Defaults Tab

1. **Primary Rating State –** Select Primary Rating State
2. **Quoting Defaults per State and Line of Business**
   1. Select Field Default for Auto Policy Term from the dropdown 6 Months or 12 Months

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AI-generated content may be incorrect.

* 1. Update ANY defaults that are needed for Auto and/or Home **per** state by selecting the specific state in the dropdown

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AI-generated content may be incorrect.

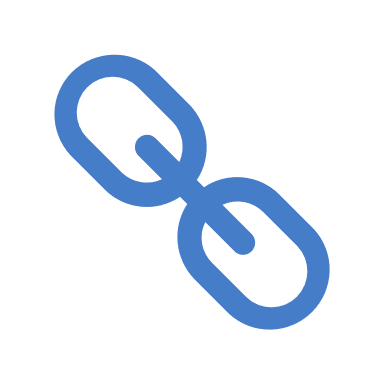
## Remarket Existing Policy

1. Locate Existing Client from locate screen

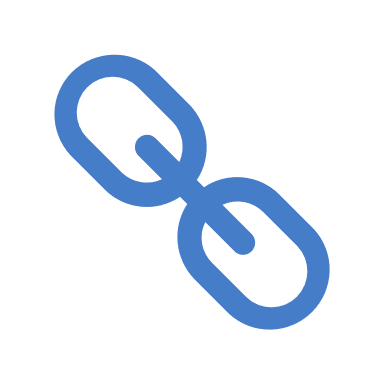
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AI-generated content may be incorrect.

1. Remarket Existing Policy (2 Options)
   1. Select **Policies** from left Navigation Panel
      1. Select/Highlight Policy to Remarket; Click **Actions > Remarket**
   2. Select **Quotes > Personal Lines** from left Navigation Panel
      1. A screenshot of a quote

         AI-generated content may be incorrect.Click the **Remarket Existing Policy** hyperlink in right corner and select existing policy from the dropdown
2. Remarket - Quote Information
   1. Verify **Policy Type** and **Description**
   2. Enter **Effective Date**
   3. Enter **Policy Source**
   4. Enter **Agency, Branch, Department** and **Profit Center**
   5. Click **Add**
3. Activity: **NPQS** *(used to document and save all attachments through the quoting process)*
   1. Defaults as **open**
   2. **Owner** - Verify
   3. Add **Notes**
   4. Click **Finish**
4. Continue to [](#_Client_Advisor_1) [**Select Applicants**](#_Select_Applicants)

## New Business Quote

1. For a [](#_Client_Advisor_1) [**New Prospect or Client:**](#_Add_New_Prospect_1)
   1. Create New Prospect or Client and complete the detail screen
   2. Click **Continue** to add additional contacts and contact information
   3. Click **Quotes** from the left Navigational Panel
      1. If no existing quotes or policies exist; Quote Information ‘New Quote’ will appear
      2. If existing quotes or policies; click the (+) or ‘Remarket Existing Policy’ hyperlink
2. A screenshot of a computer

   Description automatically generatedSelect **Policy Type**
   1. Enter **Description**
   2. Enter **Effective Date**
   3. Enter **Policy Source**
   4. Enter **Agency, Branch, Department** and **Profit Center**
   5. Click **Add**
3. Activity: **NPQS** *(used to document and save all attachments through the quoting process)*
4. Defaults as **open**
5. **Owner** - Verify
6. Add **Notes**
7. Click **Finish**

### Select Applicants

1. Applicants will generate based on **Contacts** from Account
   1. Enter Applicant and Co-Applicant
      1. If Co-Applicant is not in drop down; additional Contact must be added to [**Contacts**](#_Add_Additional_Contact)
   2. Click **Select Applicants**

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Description automatically generated

### Data Pre-Fill

* If you are a license for the data prefill program, this screen will appear. Select the Appropriate option to proceed.

A screenshot of a car registration form

Description automatically generated

1. Data Prefills will be made available for specific policy types (i.e. Vehicles, Dwelling information)
   1. You have the ability to select which Prefills you want to replace or be added
   2. A screenshot of a computer

      Description automatically generatedSelect **Prefill ‘#’ Total Fields**

### Quoting Session

1. If Remarketing Existing Policy; Quoting Session will contain information from Existing Policy
2. Select **EACH** tab to fill in the appropriate information for quoting. Completed required fields will appear green; a tab missing required information will appear red.

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Description automatically generated

A screenshot of a computer

Description automatically generated

1. **Address** tab
   1. A screenshot of a message

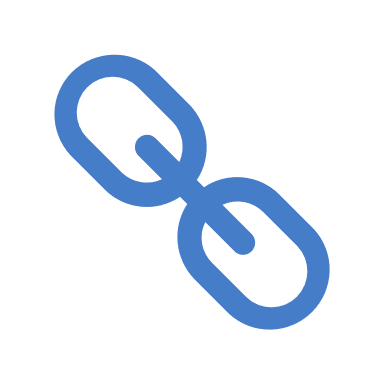
      Description automatically generatedIf the address is not UPS validated, type the correct address then click **Validate**
   2. **A screenshot of a computer

      Description automatically generated**If still no match, use the **Full Edit** button to enter the address.
   3. **Mailing Address** – Add additional address if different than Current Address

*\*\*Quotes can be edited at any time and will automatically save if quote has not been completed at time of being entered.*

### A screenshot of a computer Description automatically generatedDwelling – Quoting Session

1. **Dwelling** tab
   1. Offers various options (i.e. Search Google, Find on Zillow, Visit Assessor, Distance to Coast, etc.) The view can also be changed from map to satellite.
2. **Coverages** tab
   1. Limits
   2. Deductibles
   3. Enhanced Coverages
3. **Underwriting** tab
   1. Dwelling Characteristics
   2. Renovations
   3. Animals
   4. Losses
4. **Carrier Specific** tab
   1. **Shared Carrier-Specific Information** – Carriers who have the same required information
   2. **Carrier-Specific Information** – Carriers specific information needed for quote

**\****Carriers are based on the location of Applicant; some carriers do not write in certain states. Refer to* [](#_Client_Advisor_1)[*Available Carriers by State*](#_Available_Carriers_by)*.*

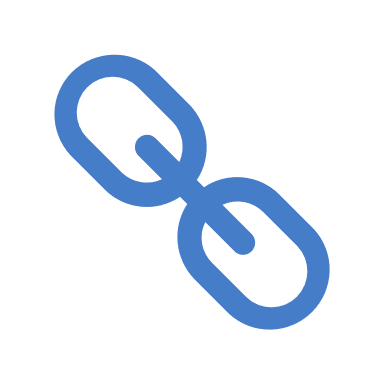
### Auto – Quoting Session

A screen shot of a computer

AI-generated content may be incorrect.

1. **Contract** tab
   1. Policy Information
   2. Current Insurance Information
   3. Carrier Discount Information (Home Insurance, Multi-Policy Discount, Affiliations)
2. **Drivers** tab (*Ability to launch Data Prefill)*
   1. Driver(s) Information (If updated on Contact Level – information will pull automatically)
   2. Driver Discounts and Surcharges
3. **Vehicles** tab (*Ability to launch Data Prefill)*
   1. Vehicle Information via Vin # or Year, Make, Model
   2. Usage of Vehicle
   3. Location of Vehicle
   4. Safety of Vehicle
4. **Coverages** tab
   1. **General Coverages** – Select from dropdown for Coverages. Asterisk will show depending on State Requirements
      1. A screenshot of a computer screen

         AI-generated content may be incorrect.Enrollment Settingsdepends on Carrier Programs
   2. **Vehicle Specific Coverages** – Select from dropdown for Physical Damage Coverage for each vehicle
5. **Incidents** tab
   1. Add any incidents for driver(s) in household (Accidents and/or Violations)
6. **Carrier Specific** tab
   1. **Shared Carrier-Specific Information** – Carriers who have the same required information
   2. **Carrier-Specific Information** – Carriers specific information needed for quote

**\****Carriers are based on the location of Applicant; some carriers do not write in certain states. Refer to* tab [](#_Client_Advisor_1)[*Available Carriers by State*](#_Available_Carriers_by)*.*

## Get Quotes

1. Once **ALL** tabs have been completed they will highlight green



1. Click **Get Quotes**

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AI-generated content may be incorrect.

### Instant Rate

1. IVANS or Instant rate quotes will display automatically

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Description automatically generated

### Get Rate

1. Some Carriers may not participate in IVANS. If they do not, select the **Get Rate** which will launch into the carrier site.



### Save Manual Quote

* 1. If a carrier does not provide online quote; manually add a quote by clicking **Save Manual Quote**
  2. Enter Rate Details and Coverages; click **Save Quote**

**A close up of a sign

AI-generated content may be incorrect.A screenshot of a computer

AI-generated content may be incorrect.**

## Quote Results

* + - 1. A screenshot of a computer

         AI-generated content may be incorrect.Select/Highlight carrier quote to view **Quote Details**
      2. Carriers may perform a credit check

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### Proceed to Carrier to Review

* + - 1. Click the box with arrow to proceed to launch carrier’s website and review the quote

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AI-generated content may be incorrect.**

### Proposal

1. Click **Prepare Proposal**
   1. Select all carrier quotes needed for Proposal

A screenshot of a computer screen

AI-generated content may be incorrect.

* 1. Click **Next**

1. **Prepare Proposal** will generate with Agency Info
   1. Click **Update Preview** to preview proposal before exporting
   2. Click **Save and Export**

*\*Proposal does not save in Epic; it saves to Download folder*

* 1. Drag and Drop Proposal to **NPQS** activity

## Quote Sold or Declined

### Mark Quote as Sold

1. A green rectangle with white text

   AI-generated content may be incorrect.Select/Highlight Carrier Quote that has been Bound/Submitted to Carrier
2. Click **Mark as Sold; Accept Quote** will generate
3. **Quote Detail** tab
   1. Policy Detail
      1. Policy Type will automatically generate based on Quote
      2. Enter Policy # and Confirm Stage of Policy
      3. Effective/Expiration will automatically generate based on Quote; if different Quote Effective Date must be updated
   2. Line of Business
      1. Line Type will automatically generate based on Quote
      2. Verify Status – **NEW** for New Business or **REW** for Remarket/Rewrite
      3. Issuing Location will automatically generate based on location of Quote
      4. Profit Center will automatically generate Personal Lines
      5. Verify Agency or Direct Bill
   3. Carrier
      1. Select Issuing Company and Premium Payable from dropdown
   4. Line Commission
      1. Check ‘Use Commission Agreement’ or manually enter % Carrier Commission
   5. Activity
      1. You have the ability to *Close* Associated Add Quote Activity as *Successful*; uncheck if you are not completed with associated activity.

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AI-generated content may be incorrect.

1. **Servicing Contacts** tab
   1. Select **P&C Producer 1**
   2. Select **P&C Servicer 1**
2. **Pr/Br Commissions** tab
   1. Add or Verify Producer and Commission % - click **Use Commission Agreement** box do not amend defaults (unless you have an agreement with leadership)
   2. If policy is remarketed – Verify Commission Agreement
3. A screenshot of a computer

   AI-generated content may be incorrect.Click **Accept**
4. Activity**: MQS** # Mark Quote Sold *(Automatically generates for your follow for the policy to be issued by the carrier)*
   1. Verify Who/Owner
   2. Follow-up/Start Date
   3. Add Notes
   4. Attach any Documents (Application, supplemental forms, etc)
   5. Click **Finish**
5. If **NPQS** activity was not closed in prior steps, close activity as Successful.

### Mark Quote as Declined

1. Select **NPQS** activity and close activity as *Unsuccessful* with a Reason as to why quote(s) were not written
2. Click **Finish**

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AI-generated content may be incorrect.

# JA.2 Marketing Module Lite (New or Renewal Business) QNEW PER EACH CARRIER

### Add Master Marketing Submission

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| 1. Click **Policies** area from the left Navigation Panel of the Client’s account 2. Change policy view from **Current** to **Marketed**      1. Click the **Add** Badge Follow outline button 2. Enter a name for the Submission (Name: 23-24 Master Submission) 3. Enter required information (Department & type of business)     Add policies to the submission by clicking the **Add** Badge Follow outline button under Policies to Market   1. **Add New Line**—Create new policy(ies) for marketing 2. Click **Detail** 3. Close the **AMMK** Activity - **Finish** 4. Enter policy detail by clicking each line in the navigation panel and completing each of the screens to fill in detail in the ACORD apps (be sure to add detail to the Personal AP/ACORD 88 first) 5. Click the **ATTACHMENTS** Tab and drag & drop all attachments to be included in the submission      1. When finished, close Submission from the **X** on left Navigation Panel |

### 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     **IMPORTANT! – Be sure to add this information** |

### Send 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

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| Be sure to attach all emails, documents, applications, etc. to **the specific carrier QNEW or QREW activity**   1. Drag & drop onto the **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    3. Enter detailed note    4. If 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.      1. Drag & Drop Carrier emails to the carrier’s **QNEW** **or QREW** Activity |

### Carrier Selected for Binding

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| 1. When a carrier is selected for binding, close **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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| Follow these steps 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**      * + Click **Finish**  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**      * + On the popup, select Yes, Perform Action and select **Move Marketed Lines to Current Policies**     ***Policies Tab****:*   1. Select **Add new Policy** 2. Enter Policy Line, Description, Effective & Expiration Dates 3. Update Stage to: Submitted or In Process if policy detail edits are needed 4. Select Contracted policy     ***Lines Tab:***   1. Select the lines to add to the new policy, renewal, or existing policy 2. Select **Add to this policy** - Adds the line to the policy added under the Policies tab  * Keep in mind, 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.  1. Under the LINE tab, select Status = NEW; enter Issuing Co (writing co); enter carrier commission rate      1. Click the **SERVICING** tab – verify the employees in each servicing role      1. Click the **PR/BR COMMISSIONS** tab      * + Click the **Add** Badge Follow outline button to add the producer who will be paid commission on this policy   + Producer Commission will default   + Production credit should be 100%  1. When finished, click **MOVE**  * Update Submission status to Completed; click **Finish**  1. **BND1** Activity – Bind Policy via Master Marketing    * Leave open for receipt of policy    * Add Notes 2. Change Policy view from MARKETED to CURRENT |

### Policy Received from Carrier

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| 1. Drag & Drop the policy dec to the appropriate **activity** in the client’s account 2. Downloaded Policy – Updates Stage to Issued automatically. Verify download.    * Click **Access > Open Activities** and close the open **BND1** activity as Successful and add final note    * Click **Finish** 3. Non-Downloaded Policy - Issue the Policy in Epic:    * Highlight the policy    * Click **Actions** > **Issue/Not Issue Policy** and **Issue**    * Verify Policy #, Effective/Expiration Dates, Estimated Premium and Policy Status (NEW)    * Click the **Close Open Activities** tab and close the open **BND1** activity as Successful and add final note    * Click **Finish**   **Review** [**Policy Checking**](#_Add_Policy_Shell) **for further workflow** |

# JA.3 Proofs of Insurance

### EPIC Auto ID Cards

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| 1. Select Policy 2. Click **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 magnifying glass to locate) 6. Select Via (Print, Email, Fax) and enter additional details 7. Click **Finish**—AUID Activity defaults closed |

### EPIC Evidence of Property Insurance

#### Add New Evidence

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| 1. Locate Account 2. Click **New** button—Proofs > Evidence 3. Select the appropriate ACORD form; enter a Title 4. Under Type, select 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 Additional Interest Distribution Tab    * Select Contact (use magnifying glass to locate)    * Select Via (Print, Email, Fax) and enter additional details    * Click **Finish** 9. Click the **X** in the left Navigation Panel to close the EPI |

#### Renew Evidence

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| * + - 1. Locate Account       2. Click **Proofs of Insurance** from the left 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 edit appropriate EPI         3. Highlight the additional interest—click the **Add** Badge Follow outline button to add new AI and detail         4. Click **Actions > Issue Singe Additional Interest**         5. Uncheck Insured if not needed. Verify AI distribution.         6. Click **Finish** |

# JA.4 Renewal Manager

### Renewal Stages

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

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| **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

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| 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

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| 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

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| This Event is tied to the Actions>Cancel>Issued process. The Stage shown on a policy cancelled 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 to before it was cancelled. |

### Renewal Manager Workflows

#### View Renewals

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| 1. From **HOME** screen select **Renewals Manager** from Navigation Bar      1. Assigned Servicers accounts will be displayed with a **Renewal Not Started** Renewal Stage      * **Personal Lines**: 60 Days prior to expiration * **Commercial Lines**: 120 Days prior to expiration * **Employee Benefits**: 90 Days prior to 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 list of possible markets |

#### Renew Policy

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| 1. Select **Renew** then refer to the [**Renewal Process**/**Non-Downloaded Policies**](#_***REVIEW_Non-Downloaded_Renewals)section in the Workflows Document      1. Once renewal is started, the Renewal Stage will change to **Renewal in Process** 2. Manually update the stage as needed: |

#### Marketing Submission

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| 1. Select **Marketing Submission** then refer to the **Marketing Module** section in 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.** |

#### Cancelled/ Non-Renewed Policies

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| **Cancelled Policies:**   1. Refer to [**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 Manger list   **Non-Renewed policies:**   1. Refer to [**Policy Not Renewed**](#_Policy_Not_Renewed) section of 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 DocuSign Integration

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| **From Attachments in the Client’s account**:   1. Right-click the attachment and select **Send to eSignature**      1. Log into **DocuSign** using your email address and password. 2. Allow DocuSign permission to integrate with Epic.      1. Select an Epic Contact; click the TO button      1. Please wait while Epic directs the document to DocuSign for signatures fields. 2. Add appropriate fields for signature, date, text, etc. by dragging and dropping onto the document.      1. If using a template, remove the extra recipient. Actions>Edit Recipient      1. Once finished, select **Actions > Edit Message**      1. Edit the email subject line and personalized message to client and select Done.      1. Select Send in the top right or bottom right corner when finished.      1. DocuSign will redirect you to sign into your account to manage your envelopes. Close out when finished. 2. **ESIG** will be the automatic activity generated once finished and will automatically remain open for follow up. Close **ESIG** as successful if there is another open activity related to this process. |

# JA.6 CSR24 – Set Up Portal User from EPIC Contacts

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| To set up a Contact as a Portal User:   1. Locate the Client’s Account in Epic 2. Click **Contacts** 3. Click **Create Client Portal Account** button      1. Click the Contact who should be set up as the Portal User 2. In the top blue options bar, click Portal      1. Username defaults to contact’s email address; change if necessary 2. Click the blue “Change Password” link and enter a temporary password      1. Check the box to Require User to change password on next login      1. Select a Start Page to assign to this client contact (your agency’s start page(s) will reflect in the dropdown list) 2. At the bottom of the screen, click this link      1. At the top of the screen, click the SAVE button      1. Notice in the Contacts area, the Portal user box will be checked for the contact just added.      1. Repeat the process for any contact listed as needed. |

# JA.7 CSR24 – Making Attachments Client Accessible

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| 1. LOCATE Client 2. Click Attachments from the left Navigation Panel 3. Right click on the attachment to give your client access, and select **Edit Attachment Detail**      1. In the Attachment Details window:    * Update the description as needed    * Select the appropriate folder (select a folder only from this list)    * Check the **Client Accessible** box    * Click **Finish** |

# JA.8 Attachment Naming Conventions

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| **Document Type** | **Naming Convention** | **Example** |
| Renewal Policy – CL or PL Policy | YY-YY (Line of Business) Policy, Carrier, Effective Date, Premium | 23-24 General Liability Policy, Travelers Eff 6-29-2023 $500 |
| New Policy - PL | YY-YY (Line of Business) Policy, Carrier, Effective Date, Premium | 23-24 Workers Comp Policy, Travelers, Eff 6-29-22, $1,500 |
| New Policy -CL | YY-YY (Line of Business) Policy, Carrier, Effective Date, Premium | 23-24 General Liability Policy, Travelers, Eff 6-29-23, $20,000 |
| Endorsement to carrier | YY-YY (Line of Business) Endt (#) to(Carrier) Eff MM-DD-YY change description, | 23-24 Auto Endt to Travelers Eff 6-29-23 Adding 2024 Ford Explorer Vin (last 4)  23-24 General Liability to Fran @ Travelers Endt Eff 6-29-23 Amend Sales to $500,000  23-24 Home Endt to processing team Effective 6-29-23 Increase home limit to $550,000 |
| Cancellation Confirmation | YY-YY (Line of Business) Cancellation, Eff MM-DD-YY, Reason | 23-24 Auto Cancellation, Effective 6-29-23, Non-Payment of Premium |
| Audit | YY-YY (Line of Business) Audit, Carrier, AP/RP | 22-23 General Liability Audit, Travelers, RP $500 22-23 Workers Comp Audit, Travelers AP $1,500 |
| Intent to Cancel | YY-YY (Line of Business) Intent to Cancel, Eff MM-DD-YY, Carrier, reason | 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 |
| Nonrenewal Notice | YY-YY (Line of Business) Non-Renewal Notice, Eff MM-DD-YY, Carrier, reason | 23-24 Auto Non- Renewal Notice, Eff 6-29-23 Travelers, no longer a market |
| Reinstatement | YY-YY (Line of Business) Reinstatement Eff MM-DD-YY | 23-24 Auto Reinstatement Eff 06-29-23 |
| Quotes | YY-YY (Line of Business) Quote Carrier, Quote $ | 23-24 Workers Comp Quote, Hartford, $500 |
| Applications | YY-YY (Line of Business) Application, Carrier (to be Completed, signed etc.) YY-YY (Line of Business) Application, Carrier (completed, signed etc.) | 23-24 Auto Application Travelers, to be completed/signed 23-24 General Liability Hartford Contractor Supp completed and signed |
| Carrier Submissions | YY-YY (Line of Business) Submitted to (Carrier) | 23-24 General Liability, Auto Umbrella Submission to Mike@Hartford |
| Endorsement Received | YY-YY (Line of Business) Endt (#) received EFF DATE change description AP/RP | 23-24 General Liability, Endt #5 received, Eff 5-1-23 amending sales to $500,000 AP $1,000 |
| Emails |  | Request to Sam/Insd for information on 2012 Ford |
| Request to Jim/Liberty/UW request for MVR information |

# JA.9 Creating a Proposal or Summary in Epic

### General Information

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| Epic has been configured with templates to allow users to generate Platform branded Proposal and Summary that can be used to present to clients when marketing coverage for new or renewal business. The Summary template is accessed using On Demand>Proposal – Do not use On Demand>Summary of Insurance.    **The following are highlights and pointers to consider:**   * The same proposal group works from either the Current/Future lines or the Marketed lines (at the carrier response stage) * Each line of business is configured to pull the following four (4) areas from the Epic policy details into the Line of Business page on the Proposal:   + Additional Coverages   + Forms & Endorsements   + Remarks (only when the Print on form is checked)   + Additional Interest * When using the Summary Group, users will have to associate the Line of business to both the Premium Summary pages and the Detail pages for each selected policy. This will ensure that the policies will appear on the premium summary page as well as the policy detail pages.      * Remember to enable Macros when the Word document generates as this is how the data merges into the document. * The overall formatting of each page of the Proposal and Summary templates has been designed to meet the legal specifications of Acrisure and to meet general needs of most of the users. The word document will need to be reviewed carefully as some data may need to be manually updated. Tables and data fields with no information should be updated or deleted and spacing should be adjusted to provide a professional look and feel. |

### How to Generate a Proposal

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| 1. Within the Client Account navigate to the Policies tab.  2. Click on a policy (or package header)   * 1. If creating a proposal for Marketed, change the view from Current/Renew to Marketed and then select the Submission.   3. On the Option Bar/Menu (top navy bar) click On Demand>Proposal.  **Refer to the screen shot below and the corresponding numbers with the following steps:**    See Notes  1. Add/Remove the policies that will need to be included in the proposal.   * 1. Click on the **Add** Badge Follow outline button and choose from either:   2. the available current/renewed policies, if generating from the current/renew policies view   3. the available lines being in the marketing submission, if generating from the marketing area   \* You do not need to reposition the LOBs on the top half of the proposal box.  2. Pick the Proposal Group. The SE Platform has the following options and each one has preselected pages within the group. Choose the option that best suits your needs.   * 1. 1. Acrisure Standard Proposal   2. 1. CL Acrisure Summary of Insurance   3. 1. PL Acrisure Summary of Insurance   3. The Proposal Templates/Proposal Documents box will display all the preselected pages available based on the selected Proposal Group. This list must be reviewed, and pages deleted or rearranged based on guidelines determined by your leadership.   * 1. You must have a cover page and it must be in the top position   2. Associate a Line of Business to the Location Summary page to pull premises data   4. Individual Contacts are from the Account Contacts tab and will default with the Primary contact. added here will pull through to the Authorized Persons page.  **Notes:**  1. Before pressing Finish, you can add/move/delete pages, using the buttons on the left.  2. If you have multiple LOB of the same type, extras will drop to the bottom of the list. Be sure to reorder them before pressing Finish.  3. The premium summary page must appear after all the LOBs. Note: after merging, it can be moved.  4. LOBs without an associated Line will be suppressed by default. Uncheck the box next to Suppress blank templates to bring in the page even if there is not a LOB connected yet (e.g. you want to offer Cyber but it is not included on your account yet). |

# JA. 10 Pr/Br Commissions

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| * Pr/Br Commission Tab for Producer / Broker Commission is a **REQUIRED** field in Epic  New Policies  * + - 1. When adding New Policies the Pr/Br Commission Tab will automatically open   **Pr/Br** tab **(REQUIRED):**   1. Click the **Add** Badge Follow outlinebutton. 2. If a **Producer** is getting paid commission on a policy, select the **Producer** from the drop-down menuand click **‘Use Commission Agreement’**. By clicking the box Commission Agreement will automatically fill in **%** of commission.   **DO NOT AMEND COMMISSION % UNLESS APPROVED BY LEADERSHIP**   * + - * 1. A screenshot of a computer             Description automatically generated**If ‘Use Commission Agreement’ box is not checked an ADC – Agency Defined Category of ‘Commission Agreement Exception’ must be added.**   A screenshot of a computer  Description automatically generated   1. Each policy requires at least one **PPAY** (Note: PPAYs are Employees; BPAYs are outside Brokers). \*\*If there is **no** Producer involved select **House**. 2. Verify **Production Credit** is 100% unless splitting with other Producers. (Note: This is not commission related but gives the Producer credit for booking the business written. **BPAYs** never receive Production Credit). **If House Code – Production Credit will be 100%.**  Renewal/Rewrite Policies **Actions** > **Renew** for Renewal with same carrier or Rewrite to a different carrier the Pr/Br Commission will default to the same Producer as prior term and update commission to Renewal Status.  Verify Producer, Check ‘Use Commission Agreement’, Verify Commission Agreement  A screenshot of a computer  Description automatically generated  Agency Defined Category (ADC)   * If different commission was agreed from Leadership, an ADC must be added to the **Policy**.   + - 1. Double Click on **Policy**       2. Select **Servicing/Billing > Line**       3. Select **Categories/History** Tab  1. Click **Add** Badge Follow outlinebutton 2. Click check box for **Comp Agreement – Non-Standard Commission Agreement** 3. A screenshot of a computer     Description automatically generatedClick **Finish**   A white rectangular object with a black stripe  Description automatically generated |

# JA. 11 Referral Workflow (Real Estate, Cyber, PEO, Payroll, etc)

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| * Referrals and related correspondence will be documented with Activities in the Epic system * Whenever a Referral is given to the Real Estate or Cyber division at Acrisure, or any outside carrier or vendor where we get a share of commission or referral fee, a policy need to be set up to receive the renewal commission. |

### Manual Activity and Policy Types

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| * **Manual Activity with the Corresponding Code:**  |  |  | | --- | --- | | **Manual Activity Code** | **Description** | | **GREF** | Non-Insurance Referral |  * **Policy Type and Description:**  |  |  | | --- | --- | | **Policy Code** | **Description** | | **R401** | 401K Referral | | **RACS** | Acrisure Cyber Services | | **RODP** | On Demand Pay Referral | | **RPA2** | Payroll Referral | | **RPE0** | PEO | | **RPE1** | PEO Benefits Package | | **RPED** | PEO Dental | | **REPM** | PEO Medical | | **RPEU** | PEO Voluntary | | **RPEV** | PEO Vision | | **RPEW** | PEO Workers Compensation | | **RPRP** | Portable Retirement Plan Referral | | **RSLO** | SMB Loan Referral | | **RSUB** | Subscription/Membership | | **RTIT** | Acrisure Title Referral | |

Add Monoline Policy

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| 1. Go to **Policies** in the left Navigation Panel within the client account. 2. Click the plus (+) button to **Add** a Policy   A screenshot of a computer  Description automatically generated   * 1. **Type**: Select from the R-type PEO policies   2. **Policy #**: Enter the policy # from the carrier   3. **Effective/Expiration Dates**: Enter the dates to match the policy term   4. **Source**: Select applicable   5. **Agency/Branch**: Select applicable   6. **Department:** Will default to OTH Non-Insurance Products   7. **Line:** Will default based on the policy type   8. **Status:** Select applicable   9. **Issuing Location:** Will default based on the primary location   10. **Bill Mode:** Select applicable agency or direct bill   11. **Profit Center:**       1. Select **PEO: PEO – AcriSource** when coverage has been placed with our AcriSource team       2. A screenshot of a computer           Description automatically generatedSelect **OTH: Non-Insurance Products** when coverage has been placed directly with a PEO   12. **Issuing Company:** Select the applicable insuring carrier   13. **Premium Payable:** Use the dropdown to change to BR and select the broker that coverage has been placed with   14. **Line Commission:** Enter the accurate commission percentage   15. **Premium:** Enter premium   16. **Commission:** Use the blue hyperlink to calculate commission  1. Click **Detail** 2. Select the **APOL** activity code   A screenshot of a computer  Description automatically generated   * 1. Add applicable notes   2. Status will default to Open; amend to **Closed** > **Successful** if policy documents have been received and no follow up is needed   3. Click **Finish**  1. Go to the **Servicing/Billing > Pr/Br Commissions** tab   A screenshot of a computer  Description automatically generated   1. Click the plus (+) button to add a PPAY 2. Use the dropdown to select the appropriate producer who wrote the business or House 3. Use the defaulted commission agreement 4. Click **Finish** 5. Go to the **Servicing/Billing > Servicing** tab and use the dropdown to select the policy servicer in the **Non-Insurance Product Sales** field   A screenshot of a computer  Description automatically generated   1. Add application detail as needed 2. Click the **X** in the left Navigation Panel to close the policyA screenshot of a computer     Description automatically generated 3. **In Process Policy**    * 1. Select No, leave “In Process” if further details need to be entered      2. Select the **Yes, perform action** radio button if all details have been entered         + Use the dropdown to select **Issue/Not Issue Policy** if all policy documents have been received         + A screenshot of a computer            Description automatically generatedUse the dropdown to select **Update State to Submitted** if policy docs are pending 4. Click **Finish** |

Add a Package Policy

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| 1. Go to **Policies** in the left Navigation Panel within the client account. 2. Click the plus (+) button to **Add** a Policy   A screenshot of a computer  Description automatically generated   1. **Line:** Select from the R-type PEO policies 2. **Status:** Select applicable 3. **Issuing Location:** Will default based on the primary location 4. **Bill Mode:** Select applicable agency or direct bill 5. **Profit Center:**    * 1. Select **PEO: PEO – AcriSource** when coverage has been placed with our AcriSource team      2. A screenshot of a computer          Description automatically generatedSelect **OTH: Non-Insurance Products** when coverage has been placed directly with a PEO 6. **Issuing Company:** Select the applicable insuring carrier 7. **Premium Payable:** Use the dropdown to change to BR and select the broker that coverage has been placed with 8. **Line Commission:** Enter the percentage 9. **Premium:** Enter premium 10. **Commission:** Use the blue hyperlink to calculate commission 11. Click **Detail** 12. Use the dropdown to select the **APOL** activity code   A screenshot of a computer  Description automatically generated   * 1. Add applicable notes   2. Status will default to Open; amend to Closed > Successful if policy documents have been received and no follow up is needed   3. Click **Finish**  1. Go to the **Servicing/Billing > Pr/Br Commissions** tab   A screenshot of a computer  Description automatically generated   1. Click the plus (+) button to add a PPAY 2. Use the dropdown to select the appropriate producer who wrote the business or House 3. Use the defaulted commission agreement 4. Click **Finish** 5. Go to the **Servicing/Billing > Servicing** tab and use the dropdown to select the policy servicer in the **Non-Insurance Product Sales** field   A screenshot of a computer  Description automatically generated   1. Return to the **Servicing/Billing > Line** screen to add additional lines to the package 2. Click the plus (+) button to **Add** a Line   A screenshot of a computer  Description automatically generated   * 1. **Line:** Select from the R-type PEO policies   2. **Line Commission:** Enter the percentage   3. **Premium:** Enter premium   4. **Commission:** Use the blue hyperlink to calculate commission   5. To add additional lines, click **Add** and repeat steps a-d   6. Once all lines have been added to the package, click **Finish**  |  | | --- | | If there is no breakdown of premium by line, enter all estimated premium and commission under one line of business. |  1. Add application detail as needed 2. Click the **X** in the left Navigation Panel to close the policy detail   A screenshot of a computer  Description automatically generated   1. **In Process Policy**    * 1. Select No, leave “In Process” if further details need to be entered      2. Select the **Yes, perform action** radio button if all details have been entered         + Use the dropdown to select **Issue/Not Issue Policy** if all policy documents have been received         + Use the dropdown to select **Update State to Submitted** if policy docs are pending      3. Click **Finish**   A screenshot of a computer  Description automatically generated |

Add a PEO Admin Fee

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| 1. Go to **Policies** in the left Navigation Panel within the client account. 2. Click the plus (+) button to **Add** a Policy   A screenshot of a computer  Description automatically generated   1. **Type**: Select the RPEO policy type 2. **Policy #**: Enter a member number or the word Fee 3. **Effective/Expiration Dates**: Enter the dates to match the policy term of the other policies 4. **Source**: Select applicable 5. **Agency/Branch**: Select applicable 6. **Department:** Will default to OTH Non-Insurance Products 7. **Line:** Will default based on the policy type 8. **Status:** Select applicable 9. **Issuing Location:** Will default based on the primary location 10. **Bill Mode:** Select applicable agency or direct bill 11. **Profit Center:**     1. Select **PEO: PEO – AcriSource** when coverage has been placed with our AcriSource team     2. A screenshot of a computer         Description automatically generatedSelect **OTH: Non-Insurance Products** when coverage has been placed directly with a PEO 12. **Issuing Company:** Select **SERVIC** for SERVICE ONLY 13. **Premium Payable:** Use the dropdown to change to BR and select the broker that coverage has been placed through 14. **Line Commission:** Enter the accurate commission percentage 15. **Premium:** Enter the fee 16. **Commission:** Use the blue hyperlink to calculate commission 17. Click **Detail** 18. Select the **APOL** activity code   A screenshot of a computer  Description automatically generated   * 1. Add applicable notes   2. Amend Status to **Closed > Successful**   3. Click **Finish**  1. Go to the **Servicing/Billing > Pr/Br Commissions** tab   A screenshot of a computer  Description automatically generated   1. Click the plus (+) button to add a **PPAY** 2. Use the dropdown to select the appropriate producer who wrote the business or House 3. Use the defaulted commission agreement 4. Click **Finish** 5. Go to the **Servicing/Billing > Servicing** tab and use the dropdown to select the policy servicer in the **Non-Insurance Product Sales** field   A screenshot of a computer  Description automatically generated   1. Click the **X** in the left Navigation Panel to close the policy 2. Select the **Yes, perform action** radio button 3. Use the dropdown to select **Issue/Not Issue Policy** 4. Click **Finish**   A screenshot of a computer  Description automatically generated |