

Process Map

Wednesday, February 21, 2024 8:15 AM

Link to Visio Process Map

[BOR Model - 1DS EPIC Data Import Process 3-10-2025](#)

Data Intake File

1. Mike/Brian asks AP/Platform to supply the lookup codes for the groups that are moving to ADS, along with whether they are on Group EPIC, Platform EPIC, or Standalone EPIC database.
2. AP/Platform sends information back.
3. Project Manager sends Mike Vollmer the list of lookup codes and what EPIC platform they are on, asking for a data extract.
 - a. CC' Systems Implementation Analysts on all requests to Mike V.
4. Mike Vollmer pulls data extract and sends back to Project Manager for data analysis.

Platform Block Transfers:

1. ADS Leaders meets with Platform Leaders to review process, EPIC window, Opt-Out Tool
2. Platform Leadership works through Opt-Out Tool
3. ADS PM Team extracts Opt-in File

Discovery Questions

In addition to gathering Group & Policy data on the data intake file, ask the AP/Platforms for answers to the discovery questions below.*

What AMS System does each AP within this block transfer use?

What Benefit Admin System/Enrollment Vendor do they use? (Example: Ease, Employee Navigator)

What Payroll Vendors do the clients use?

Do the AP's within this block transfer use Suvaun?

- a. If so, are all groups in Suvaun, or can you provide a list that are in Suvaun? (We ask this because we can have their Suvaun profiles transferred to our Suvaun account which is easier than building them from scratch.)

Are there any "level" or "self-funded" medical plans?

- a. If so, which ones? (We may not be able to handle these plans.)

How are compliance notifications (i.e. State COBRA, COBRA, Privacy, POP, etc.) handled for the groups in the block transfer? (Identify Vendor's and details for each group)

Are any of the transferred groups assigned to a GA? If yes, can you identify which groups and what GA they are written through?

Do any groups pay a "Micro Fee" (fee paid to AP/Platform in addition to the commission received from the carriers)?

- a. If so...

- a. How much?

- b. How Frequent?

- c. Is there a fee agreement in place with the client?

- d. How are the clients invoiced?

Please identify high priority clients.

High Priority = High Revenue (Either in one particular LOB or across multiple LOB)

OR = Special Relationship

*Number of High Priority Clients should not exceed 2% of the Book of Business being transferred to Acrisure Digital Solutions

Where are attachments kept? (In AMS System, File Folders, or other?)

Who is listed as producer on House Accounts with the carriers?

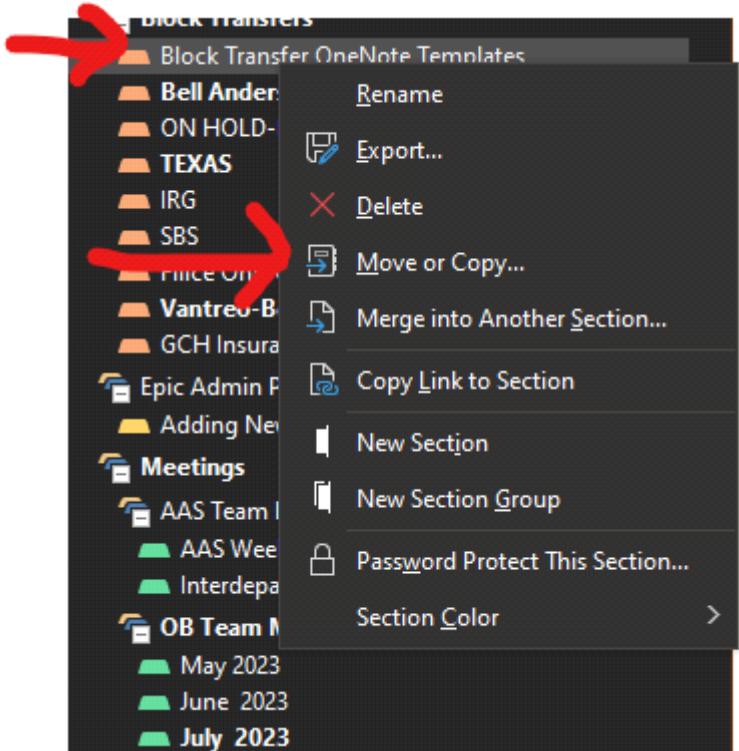
*Not having this information upfront shouldn't hold the project from moving forward. We can continue to gather this information while moving forward with Data Analysis and Kick-off.

Next Step: Setting up OneNote Section for Project

Setting up OneNote Section for Project

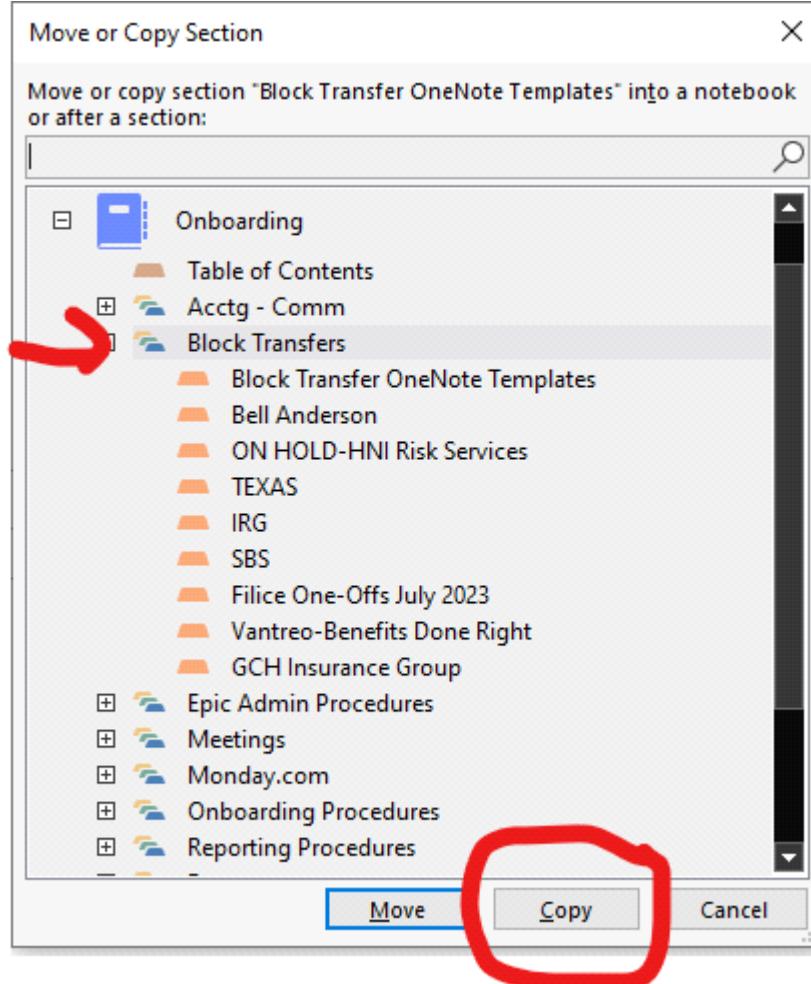
Wednesday, September 27, 2023 9:38 AM

1. Right click on the section titled [Block Transfer OneNote Template](#)
2. Click Move or Copy



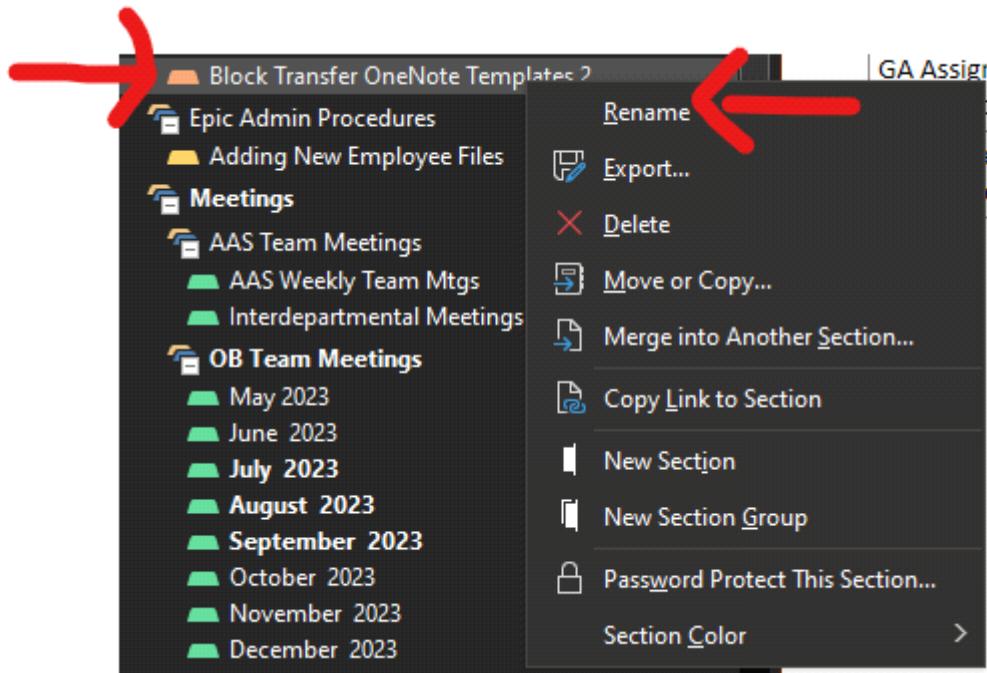
3. Highlight Block Transfers Group Section

4. Click Copy



5. Right click on the section copy you just created

6. Click Rename



7. Type in the APs name

8. Delete the Project Log-Platform Model page ([Example](#))

9. Go to the Contact Info page for the project you just created a tab for.

10. Type in the contact information for the project ([Example](#))

11. Add the answers to the Discovery Questions to the Discovery Questions OneNote page for the project ([Example](#))

Next Step: Data Analysis

EPIC Extract Format

Friday, March 29, 2024 2:38 PM

RE_
Updates t...

Template & Sample Files

File	Description
Standardized EPIC Extract Template	EPIC Extract Template
ACB Data Pull Req_...	Example: ACB Data Extract

Extract Query Details

Group Contacts Tab	• Pulls all but primary contact into this tab
Client Tab	• This will have primary contact info, address info and other client level information
Policy Detail Tab	• This contains all the policy details for the groups we sent to be extracted
Extract's Date Range	• Mike V. will pull anything active & future dated policies
Premium & Commission Amounts on Package Policies	<ul style="list-style-type: none"> Pulled at line level & policy level <ul style="list-style-type: none"> If Policy level commissions look inflated it is because of data entry error on the AP/Platform side, most likely caused by AP/Platform entering the total policy premium/commission amount at line level for each policy in package instead of breaking it out by line. Policy level will then get zeroed out so that the script to calculate based on line level can run.

Field Notes

Field Name	Notes							
Dept	<ul style="list-style-type: none"> Will pull all lines <ul style="list-style-type: none"> PM will review file and mark non-EB policies and they will be removed from the file before being sent for import 							
STATUS	<ul style="list-style-type: none"> The following status codes are excluded: <table border="1"> <tr><td>QUO – Quoting Use Only</td></tr> <tr><td>CRN – Cancelled</td></tr> <tr><td>CRW – Cancelled</td></tr> <tr><td>ZER – Created in Error</td></tr> <tr><td>NRR – Non-renewed Renewal</td></tr> <tr><td>CNW- Cancelled New</td></tr> <tr><td>NRN- Non-renewed New</td></tr> </table>	QUO – Quoting Use Only	CRN – Cancelled	CRW – Cancelled	ZER – Created in Error	NRR – Non-renewed Renewal	CNW- Cancelled New	NRN- Non-renewed New
QUO – Quoting Use Only								
CRN – Cancelled								
CRW – Cancelled								
ZER – Created in Error								
NRR – Non-renewed Renewal								
CNW- Cancelled New								
NRN- Non-renewed New								
IssCompany	<ul style="list-style-type: none"> Will be changed from code to full name/description 							
PPECompany	<ul style="list-style-type: none"> Will be changed from code to full name/description 							
Service Role 1	<ul style="list-style-type: none"> Full name/description not code 							
Service Role 2	<ul style="list-style-type: none"> Full name/description not code 							
GroupProd	<ul style="list-style-type: none"> Full name/description not code 							
GroupCSR	<ul style="list-style-type: none"> Full name/description not code 							
Service Role 5	<ul style="list-style-type: none"> Full name/description not code 							
Service Role 6	<ul style="list-style-type: none"> Full name/description not code 							
Service Role 7	<ul style="list-style-type: none"> Full name/description not code 							
Service Role 8	<ul style="list-style-type: none"> Full name/description not code 							
Service Role 9	<ul style="list-style-type: none"> Full name/description not code 							
Service Role 10	<ul style="list-style-type: none"> Full name/description not code 							

Acrisure Digital Solutions	BOR Model Procedures	Extracted 5/12/2025
EBProd1	• Full name/description not code	
EBProd2	• Full name/description not code	
EBServicer1	• Full name/description not code	
EBServicer2	• Full name/description not code	
Service Role 15	• Full name/description not code	
Service Role 16	• Full name/description not code	
Service Role 17	• Full name/description not code	
Service Role 18	• Full name/description not code	
Service Role 19	• Full name/description not code	
Service Role 20	• Full name/description not code	
PRBR1	• Full name/description not code	
PRBR2	• Full name/description not code	
PRBR3	• Full name/description not code	
PAYLk_4	• Full name/description not code	
PAYLk_5	• Full name/description not code	
PAYLk_6	• Full name/description not code	
PAYLk_7	• Full name/description not code	
PAYLk_8	• Full name/description not code	
PAYLk_9	• Full name/description not code	
PAYLk_10	• Full name/description not code	

EPIC Build from Export File

- The export file will be mapped to the EPIC Import Utility file format for import

Data Analysis Process

Wednesday, September 27, 2023 9:23 AM

Opt-In File Review (Platform Block Transfers Only)

1. ADS PM reviews Opt-In File (See [Review Checklist](#))
2. ADS PM sends Opt-in file to Data & Import Team and cc's ADS System Implementation Team

Next Step: Kick-Off

EPIC Extract Data Review

1. Data & Imports Team pulls EPIC data by lookup code via BDE and sends to ADS PM.
2. Review data extract for non-Employee Benefits polices or any other policies that should not be imported into ADS EPIC and remove the non-EB policies from the extract file.

- a. Check for supported vs non-supported policy types (Use link below for supported vs non-supported policy types)

[EB Policy Types Supported vs Non-Supported](#)

Note: Remember save original file before removing non-EB policies

3. ADS PM reviews data file and discovery question answers for any errors or missing data. ([See Review Checklist](#)) and ADS leadership negotiates producer comp and house account changes.
4. ADS PM sends [Data Extraction Review & Confirmation Email](#)
5. ADS PM sends file to AST Team Lead and Brian Lelio for AM Assignments.
6. Once AM Assignments are complete, ADS PM sends final approval request to Platform Leader.

Next Step: Producer Licensing Confirmation

Review Checklist

Tuesday, July 25, 2023 12:44 PM

Below is a list of things to review when you receive a data intake file from an AP. This is not a comprehensive list.

- Do all the groups on the list sent for EPIC Extract appear on the EPIC Data Extract spreadsheet? (Use [v-lookup](#) or [x-lookup](#) to audit)
- Are there any Rows/Columns hidden?
- Are there any cells/rows/columns left fully/partially blank?
- Are there any compliance fees?
 - May show up as separate line with XYZ Carrier as the issuing & billing company.
- Do the # of EE's & # of EE's enrolled make sense?
 - For example are there more enrolled than total # of EE's. (Could mean they are counting dependents in enrolled # or there might be a typo)
- Check plan start and expiration dates.
 - Are the expiration dates after the start dates?
 - Is the start date on the 1st of the month and the end date on the last day of the previous month a year later (
 - **Example:** Start = 11/1/2023 & End = 10/31/2024
 - Are there any of the policies already expired? (AP may have forgotten to update after renewing....or it may be a lost group).
 - Are there any mistyped dates? Example: 13/1/2024 instead of 12/1/2024
- Are there any new carriers that aren't in EPIC yet? (See [Appointed Carriers- AAS](#))
- Are there any commissionable producers?
- Are there clients in any states that aren't supported by Ease or Suvau? (See [Finding Rate Areas](#))
- Double check Premium, Revenue, and Commission % to make sure they align/make sense.
 - Do the commission rates seem low?
 - Do the commission rates seem high?
 - Are there any PEPMs?
 - Are all Commissions entered? If not, enter the data as a Flat Fee per Policy Line.
- Do the NAICS & SIC Codes match with codes in EPIC (See [EPIC NAICS & SIC Codes](#))
- Check policy type(s)
 - **Policy Types We Can't Take**
 - Individual Policy Types (All)
 - ICHRA
 - Self-Funded
 - Worksite Products
- Check States (making sure ADS and Platform AM's are licensed there)
- Check for international addresses (Ex: BC = Canada)
- Review for any HealthNet or Centene policies (they have to be [manually BOR'd](#))

Finding Rate Areas

Tuesday, July 25, 2023 1:03 PM

1. Find out which county the group is located in. (Google Search by Zip code or city, state)
 2. Click the link to for the state the group is located in. This will take you to a webpage that has a table of all the rate areas by county.
- NOTE: If all groups are already in Suvaun and Ease, this would not be a necessary step. This is a rare scenario.*

Rate State	Rate Area*	In Suvaun (Yes/No)*
Alabama	https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Market-Reforms/al-gra	Yes
Alaska	https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Market-Reforms/ak-gra	Yes
Arizona	https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Market-Reforms/az-gra	Yes
Arkansas	https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Market-Reforms/ar-gra	Yes
California	https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Market-Reforms/ca-gra	Yes
Colorado	https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Market-Reforms/co-gra	Yes
Connecticut	https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Market-Reforms/ct-gra	Yes
Delaware	https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Market-Reforms/de-gra	No
District of Columbia	https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Market-Reforms/dc-gra	Yes
Florida	https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Market-Reforms/fl-gra	Yes
Georgia	https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Market-Reforms/ga-gra	Yes
Hawaii	https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Market-Reforms/hi-gra	Yes
Idaho	https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Market-Reforms/id-gra	Yes
Illinois	https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Market-Reforms/il-gra	Yes
Indiana	https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Market-Reforms/in-gra	Yes
Iowa	https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Market-Reforms/ia-gra	Yes
Kansas	https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Market-Reforms/ks-gra	Yes
Kentucky	https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Market-Reforms/ky-gra	Yes
Louisiana	https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Market-Reforms/la-gra	Yes
Maine	https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Market-Reforms/me-gra	Yes
Maryland	https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Market-Reforms/md-gra	Yes
Massachusetts	https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Market-Reforms/ma-gra	No
Michigan	https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Market-Reforms/mi-gra	Yes
Minnesota	https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Market-Reforms/mn-gra	Yes
Mississippi	https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Market-Reforms/ms-gra	Yes
Missouri	https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Market-Reforms/mo-gra	Yes
Montana	https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Market-Reforms/mt-gra	Yes
Nebraska	https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Market-Reforms/ne-gra#Small-Group-Market	Yes
Nevada	https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Market-Reforms/nv-gra	Yes
New Hampshire	https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Market-Reforms/nh-gra	No
New Jersey	https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Market-Reforms/nj-gra	Yes
New Mexico	https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Market-Reforms/nm-gra	Yes
New York	https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Market-Reforms/ny-gra	Yes
North Carolina	https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Market-Reforms/nc-gra	Yes
North Dakota	https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Market-Reforms/nd-gra	Yes
Ohio	https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Market-Reforms/oh-gra	Yes
Oklahoma	https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Market-Reforms/ok-gra	Yes
Oregon	https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Market-Reforms/or-gra	Yes
Pennsylvania	https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Market-Reforms/pa-gra	Yes
Rhode Island	https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Market-Reforms/ri-gra	Yes
South Carolina	https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Market-Reforms/sc-gra	Yes
South Dakota	https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Market-Reforms/sd-gra	Yes
Tennessee	https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Market-Reforms/tn-gra	Yes
Texas	https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Market-Reforms/tx-gra	Yes
Utah	https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Market-Reforms/ut-gra	Yes
Vermont	https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Market-Reforms/vt-gra	Yes
Virginia	https://www.cms.gov/cciio/programs-and-initiatives/health-insurance-market-reforms/va-gra	Yes
Washington	https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Market-Reforms/wa-gra	Yes
West Virginia	https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Market-Reforms/wv-gra	Yes

CT- Yes
MA- No
RI- No
VT- No

Acrisure Digital Solutions	BOR Model Procedures	Extracted 5/12/2025
Wisconsin	https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Market-Reforms/wi-gra	Yes
Wyoming	https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Market-Reforms/wy-gra	Yes
American Samoa	https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Market-Reforms/as-gra	No
Guam	https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Market-Reforms/gu-gra	No
Northern Mariana Islands	https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Market-Reforms/nmi-gra	No
Puerto Rico	https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Market-Reforms/pr-gra	No
US Virgin Islands	https://www.cms.gov/CCIIO/Programs-and-Initiatives/Health-Insurance-Market-Reforms/vi-gra	No

*This data is updated as of 2023

3. Find the county that is associated with the groups zip code/city in the table.
4. In column AZ (labeled Rate Area) on the data intake file, enter the rate area that is listed next to the county.
5. Repeat for each group on the data intake file.

EPIC NAICS & SIC Codes

Monday, October 2, 2023 2:09 PM



Epic NAICS
& SIC Cod...

NOTE: This was pulled as an NAICS/SIC file from EPIC.

Please use this file to cross check the data contained in the Data Intake File that is under review by the PM.

Producer Licensing Confirmation

Tuesday, June 4, 2024 10:32 AM

File Examples

Data Extract File:



South
Platform ...

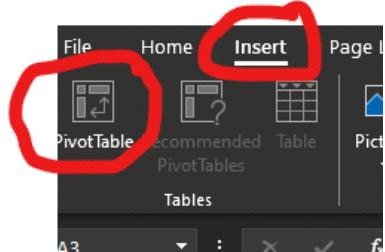
Producer Licensing List:



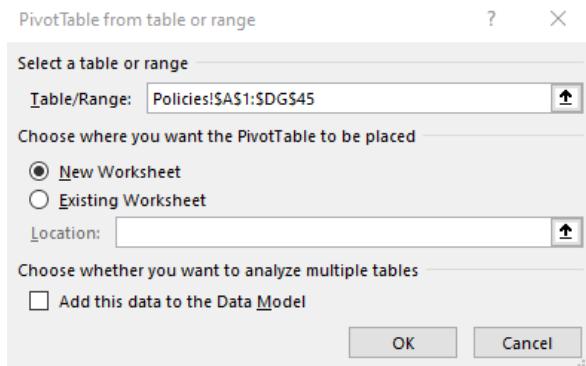
South
Platform ...

Instructions

1. Open data extract file.
2. Go to policies tab.
3. On the top of the screen go to the insert banner.
4. Click pivot table to create a pivot table.



5. Select table range if it doesn't do it for you.
 - a. You will want all the PRBR producer columns and the issuing state in order to gather the information you need.
6. Select New Worksheet for where you want the pivot table placed.



7. Click ok.
8. In the Rows field drag and drop PRBR1 and Issuing location.

PivotTable Fields

Choose fields to add to report:

Search

PRBR1

PRBR1ProdCdt

PRBR1CommType

PRBR1Comm%

test

Producer Commission

PAY2Type

PRBR2

PRBR2PrdCdt

PRBR2CommType

PRBR2Comm%

DAV2Type

Drag fields between areas below:

Filters Columns

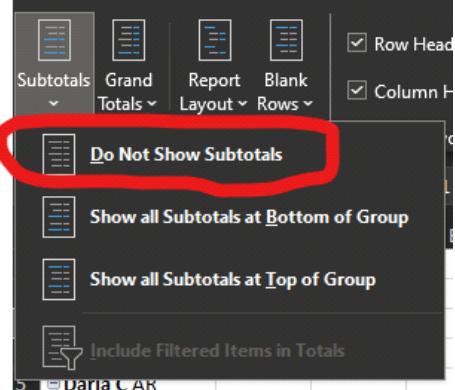
Rows Values

PRBR1

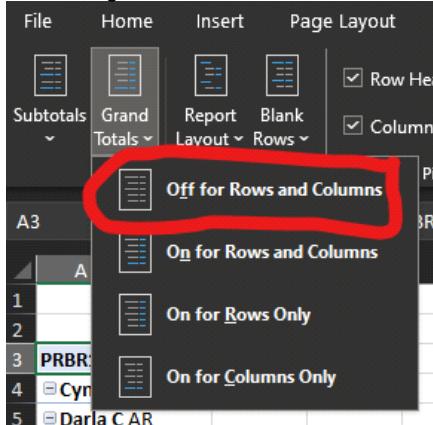
IssLoc

Defer Layout Update Update

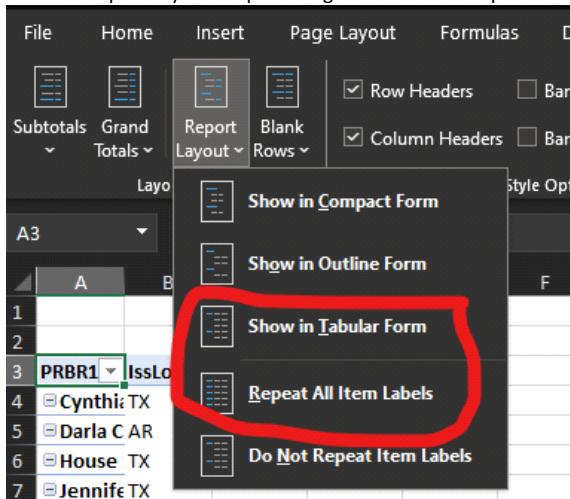
9. Select the pivot table and go to the design banner.
10. Click the subtotals dropdown and select "Do Not Show Subtotals"



11. Click the Grand Totals dropdown and select "Off for Rows and Columns"



12. Click the Report Layout dropdown and select "Show in Tabular form"
13. Click the Report Layout dropdown again and select "Repeat All Item Labels"



14. Copy the pivot table results into a separate spreadsheet. (Paste values only to get rid of the pivot table function.)
15. Save this spreadsheet in the project's folder in OneDrive.
 - a. Use naming convention: Project Name_Producer Licensing List
 - b. Example: South Platform Wave 2_Project Licensing List

If you don't have any producers listed in PRBR2 column that are being paid
producer compensation skip to step 26

16. Go back to the pivot table tab.
17. In the Rows field remove PRBR1 and add PRBR2

PivotTable Fields

Choose fields to add to report:

Search

PAY1Type
 PRBR1
 PRBR1ProdCdt
 PRBR1CommType
 PRBR1Comm%
 test
 Producer Commission
 PAY2Type
 PRBR2
 PRBR2PrdCdt
 PRBR2CommType
 PRBR2Comm%
 PAY3Type

Drag fields between areas below:

Filters Columns

Rows Values

PRBR2
IssLoc

Defer Layout Update

18. Copy the pivot table results and past into that separate spreadsheet you created in step 9.

If you don't have any producers listed in PRBR3 column that are being paid producer compensation skip to step 26.

19. Go back to the pivot table tab.
20. In the Rows field remove PRBR2 and add PRBR3

PivotTable Fields

Choose fields to add to report:

Search 🔍

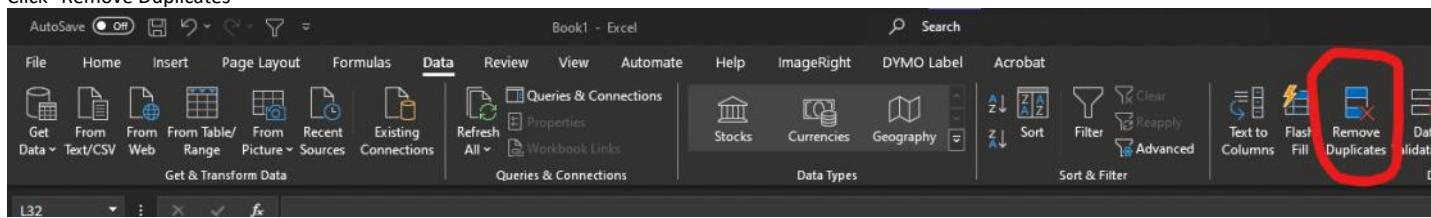
PRBR1ProdCdt
PRBR1CommType
PRBR1Comm%
test
Producer Commission
PAY2Type
PRBR2
PRBR2PrdCdt
PRBR2CommType
PRBR2Comm%
PAY3Type
 PRBR3
PRBR3ProdCdt
PRBR3CommType

Drag fields between areas below:

<input type="checkbox"/> Filters	<input type="checkbox"/> Columns
<input type="checkbox"/> Rows	<input type="checkbox"/> Values
PRBR3	
IssLoc	

Defer Layout Update Update

21. Copy the pivot table results and past into that separate spreadsheet you created in step 9 & 12.
 22. On the producer licensing spreadsheet you created remove all House Accounts and blanks.
 23. Select the two columns with data in them.
 24. Go to data banner.
 25. Click "Remove Duplicates"



26. Make sure the file is saved and exit.

Note: If you have policies in multiple EPIC Databases or other AMS systems you will need to repeat the steps above for each database/system (but pasting to the same Producer Licensing List file)

You now should have a file that contains a list of all the producers being paid producer comp and the states they have written policies in.

27. Open the [Confirmation of Licensed Producer](#) email template.
 28. Update the subject line to include your project name.
 29. Attach the Producer Licensing List file to the email.
 30. Add the platform leader to the To: field.
 31. Once you receive response, save it in your project's OneDrive file.

Note: If a producer is not licensed in a state they won't be eligible to continue to receive producer compensation for policies written in that particular state.

- They can decide to get licensed in that state if they so choose, but they will need to work with licensing to do that.
- If they aren't licensed in a state and they chose not to pursue the license remove them from PRBR and make it a house account.

Next Step: Carrier Panel Report

Kick-off Process

Friday, September 22, 2023 12:37 PM

1. Schedule kick-off with AP/Platform.
 - Presentation shouldn't take longer than 15 minutes + 15 minutes for questions
2. Personalize Kick-off Presentation
 - [Power Point Template](#)
3. Have Kick-off meeting.
 - a. During call confirm with Platform Leaders they are aware of their responsibility to train ADS AM(s) on regional specifics (i.e. markets, requirements, etc.)
4. Send out "[Getting Started](#)" email to AP
 - Sent from Project Manager's personal AAS email address
 - Attachments to add to email
 - [1.0 OB to AP Letter.pdf](#)
 - [1.1 First Contact AP to Customer Email.docx](#)
 - [1.2 AP to Customer Phone Script.pdf](#)
 - [1.3 AAS Lead Generation Form.docx](#)
 - [1.4 Partner Kick-off Meeting Deck.pdf](#)
 - [1.5 AAS Cobranded Instructions.docx](#)
 - [1.6 AAS Benefits Overview AP.pdf](#)
 - [1.7 FAQ's AP to Customer.pdf](#)
5. Send notification to ADS AM Team Management to let them know project has kicked off.
 - Template: [AAS AM Management Team Kickoff Notification and Block Transfer Stats.oft](#)
 - Include:
 - AP Name OR Platform Name
 - Group Count
 - Policy Count
 - Total Annual Premium
 - Total Annual Revenue
 - Total Annual Micro Fees (if AP charges Micro Fees)

Next Step: EPIC Extract Review

Panel Carrier Report

Tuesday, February 27, 2024 1:41 PM

Purpose:

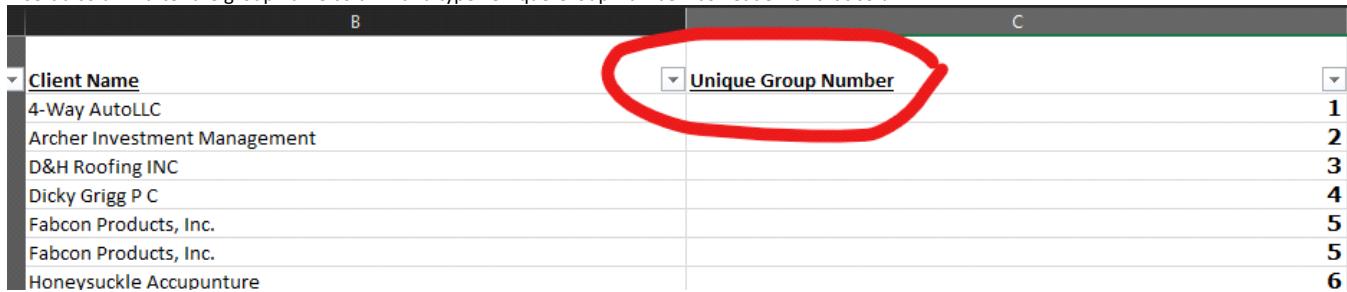
Sent to our panel carriers so that they know when they can expect an influx in new quotes. Part of the agreement with the panel carriers is that we will give them an opportunity to quote for all our groups (whether or not they have policies with them already).

Sample Report:

Original File	 Northwest Platform_...
File up to Step 16 (Before deleting out columns)	 Northwest Platform_...
Final Panel Carrier Report	 Northwest Platform_...

Instructions:

1. Open the final data file for the block transfer.
2. Save a copy of this file with the naming convention Platform Name_Panel Carrier Report_Date of Report to the OneDrive file for that block transfer.
Example:
South Platform Wave 1_Panel Carrier Report_02-26-2024
3. Insert a column after the group name column and type "Unique Group Number" as header for that column.



	B	C
▼ Client Name		<u>Unique Group Number</u>
4-Way AutoLLC		1
Archer Investment Management		2
D&H Roofing INC		3
Dicky Grigg P C		4
Fabcon Products, Inc.		5
Fabcon Products, Inc.		5
Honeysuckle Accupuncture		6

4. In the second cell of the column you just created, copy and paste the following formula:
 $=IF(COUNTIF(B$2:B2,B2)=1,MAX(C$1:C1)+1,VLOOKUP(B2,B$1:C1,2,0))$

NOTE: Depending on the location of the Client/Group Name column and the Unique Group Number column in the worksheet you may need to manually adjust the formula to reflect the correct column letter.

Example:

Say the client name column in the above example was actually in column F and the unique group number was in column G, in the formula where you see B you would change it to F and where you see C you would change it to G.

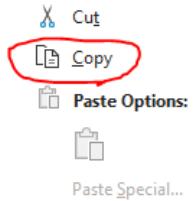
The final formula would read:

$=IF(COUNTIF(F$2:F2,F2)=1,MAX(G$1:G1)+1,VLOOKUP(F2,F$1:G1,2,0))$

5. Copy the formula down for each row in the Unique Group Number column. You can do this by clicking the lower right corner of the cell you just entered the formula into. The Unique Number column should now display a unique number for each group

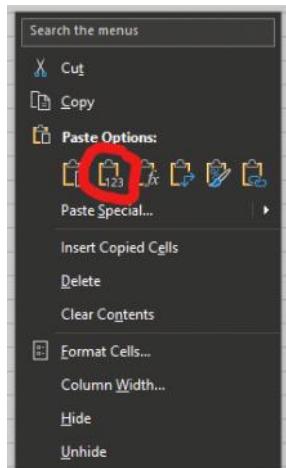
B	C	D
Client Name	Unique Group Number	\$
4-Way AutoLLC		1 8
Archer Investment Management		2 5
D&H Roofing INC		3 2
Dicky Grigg P C		4 5
Fabcon Products, Inc.		5 4
Fabcon Products, Inc.		5 4
Honeysuckle Accupuncture		6 6
Jean Marc Fray Inc.		7 4
Jean Marc Fray Inc.		7 4
Local Lifters LLC		8 4
North Forest Development Austin LLC		9 2
North Forest Development Austin LLC		9 2
Price Ainsworth ,LLP		10 5
Texas Land Surveying, Inc.		11 5
Texas Land Surveying, Inc.		11 5
Weinman & Associates, P.C.		12 5
Weinman & Associates, P.C.		12 5
Weinman & Associates, P.C.		12 5
Wildflower Animal Hospital PLLC		13 5
Wildflower Animal Hospital PLLC		13 5
Wildflower Animal Hospital PLLC		13 5
AEM Group, LLC		14 1
Aria Real Estate Group, LLC		15 5
AT VENTURES LLC dba ATV Bookkeeping		16 5
AT VENTURES LLC dba ATV Bookkeeping		16 5
AWKA Properties, LLC		17 5
AWKA Properties, LLC		17 5
Ben Coffin dba Granny Had One		18 7
Ben Coffin dba Granny Had One		18 7
Ben Coffin dba Granny Had One		18 7
Bliss Electric		19 2
Bodin Chiropractic PLLC		20 6

6. Highlight the Unique Group Number column.
7. Right click and select copy.



8. Right click in the first cell of the Unique Group Number column
9. Right click and select paste values

Note: The paste option with the clipboard icon with 123 in it is paste values only.



8. Highlight the 4 columns after the Unique Group Number column.
9. Right click.
10. Select insert.

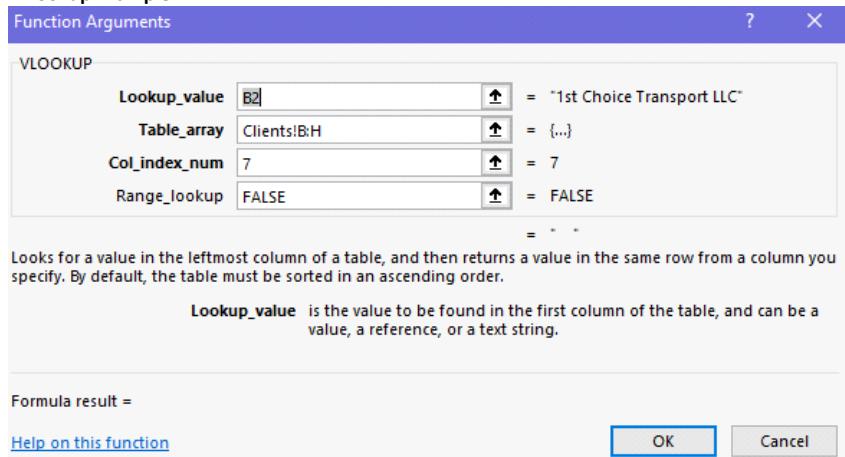
Note: This should have inserted 4 blank rows in after the Unique Group Number column.

11. Title the first blank column *Client State*, the second blank column *Client Zip Code*, the third column *SIC Sector*, the fourth column *NAICS Sector*

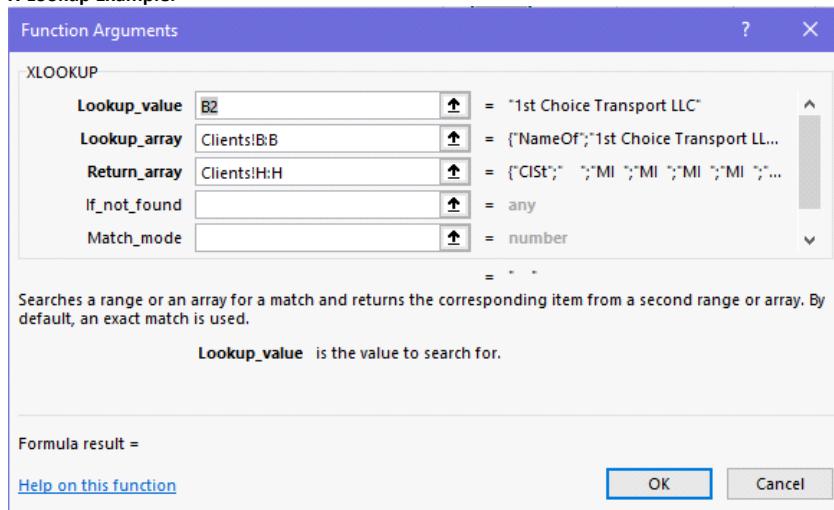
Unique Group #	State	Zip Code	SIC Sector	NAICS Sector
1				

12. In the second cell of the column you titled Client State, do a v or xlookup using the AccountName on the Policies tab and matching it to the clients tab to populate the state for the policy.

V-Lookup Example:

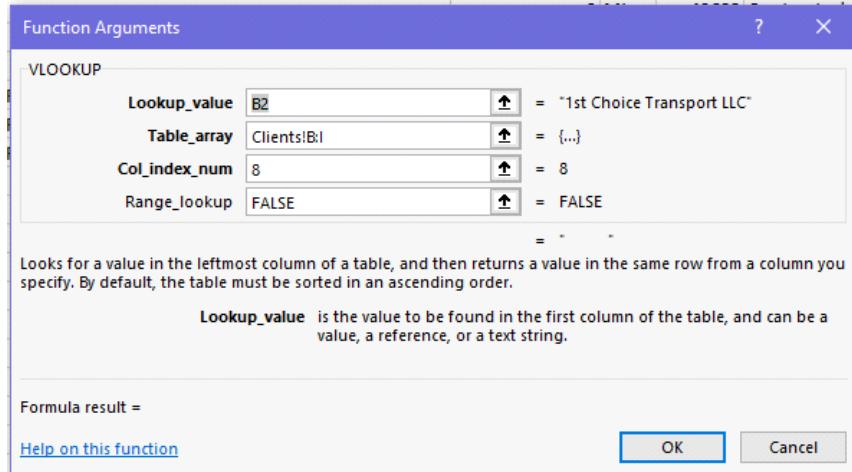
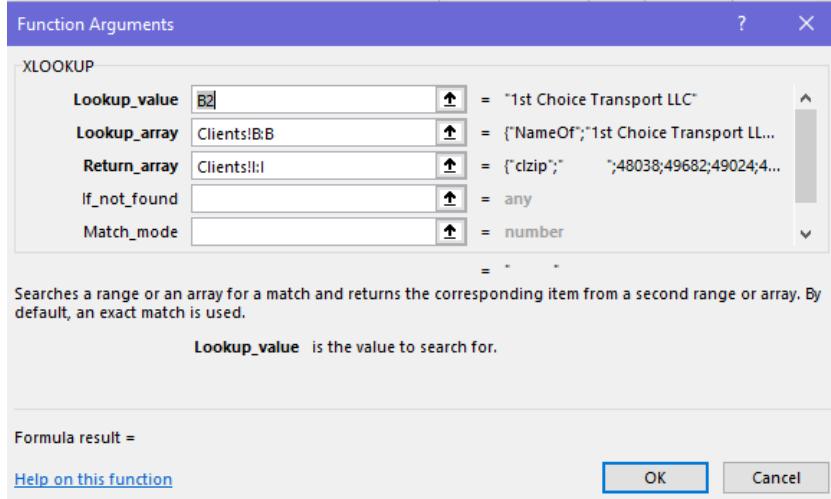


X-Lookup Example:

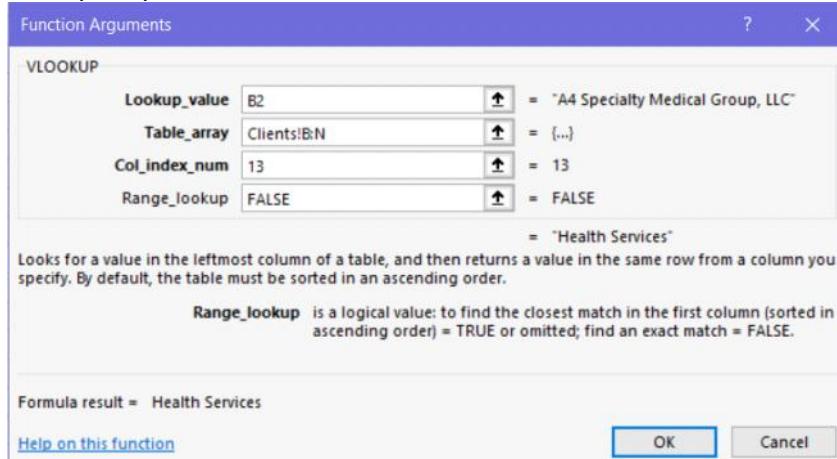


13. In the second cell of the column you titled Client Zip Code, do a v or xlookup using the AccountName on the Policies tab and matching it to the clients tab to populate the zip code for the policy.

V-Lookup Example:

**X-Lookup Example:**

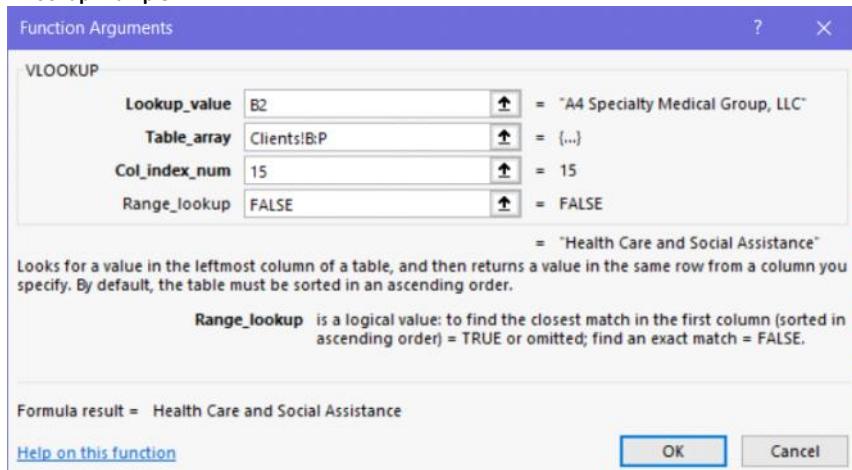
14. In the second cell of the column you titled SIC Sector, do a v or xlookup using the AccountName on the Policies tab and matching it to the clients tab to populate the SIC Sector for the policy.

V-Lookup Example:**X-Lookup Example:**

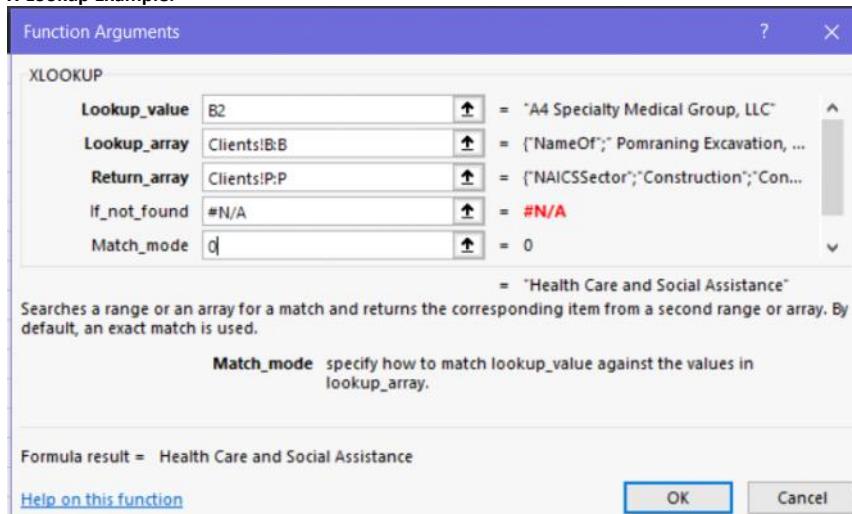


15. In the second cell of the column you titled NAICS Sector, do a v or xlookup using the AccountName on the Policies tab and matching it to the clients tab to populate the NAICS Sector for the policy.

V-Lookup Example:

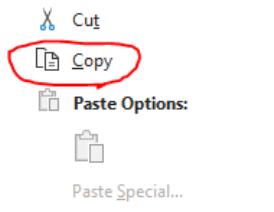


X-Lookup Example:



16. Highlight the Client State, Client Zip, SIC Sector, and NAICS Sector columns.

17. Right click and select copy.



18. Right click in the first cell of the Client State column.

19. Right click and select paste values

Note: The paste option with the clipboard icon with 123 in it is paste values only.



14. Delete all columns except for the following:

- Unique Group Number
- Client State
- Client Zip Code
- SIC Sector
- NAICS Sector
- Policy Effective Date
- Line Type Description
- RisksInsured

15. Highlight the policy effective column

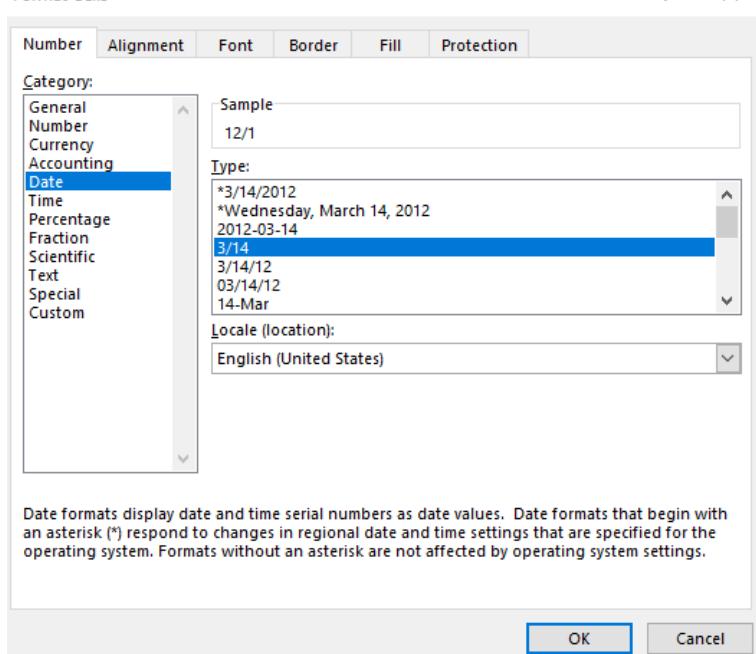
16. Right click

17. Select Format Cells

18. On the numbers tab, select Date under the Category field.

19. Under Type, select the option that just shows the month and date (no year)

Format Cells



20. Make sure file is saved and close file.
21. Send report to Brian Lelio & Bethany Lueb using [Platform Name Panel Carrier Report](#) email template in the [Email Templates folder in OneDrive](#).

Note: When sending the email make sure to update the email subject line and the body of the email to include platform name.



Hello Brian & Bethany,
Attached is the Panel Carrier Report for the [Platform Name] block transfer to send to the panel carriers.

Thank you

Taylor Montgomery
Business Implementation Analyst



Email: [TaMontgomery@Acrisure.com](mailto:Tamontgomery@Acrisure.com)
Direct: (380) 254-8062

Service Team acustomerservice@acrisure.com | 800-793-0882

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Next Step: System Builds

AM Introduction Call

Monday, April 8, 2024 10:00 AM

After the Kickoff Call is completed, it is important to get an AM Introduction Call on the calendar as the next presentation that will be held with the Platform Leader/AP.

Purpose

The purpose of the AM Introduction Call is to introduce the Account Managers on both sides of the block transfer so that they can coordinate and make the transition with clients go as smoothly as possible.

It covers the following:

- Ask/Answer Questions on groups/policies/carriers/processes
- Share insights on market, group, carrier intricacies
- Start renewal & deprecation discussions

When it takes place

The call is scheduled after the Kickoff Call takes place and after AM Assignments have been made by AST Leadership.

Who is invited

- Platform Leader/AP
- AM's from AP/Platform (indicated by Platform Leader/AP)
- The PM of the Block Transfer
- AM's assigned to the Block Transfer by AST Leadership
- Mike (*optional*)

What is delivered

The PowerPoint presentation (**link below**) is developed to guide the discussion. It covers the following items that AP's may have questions on:

- Block Transfer Status Updates
 - o Go over email template that is sent out weekly to update the project status.
- Block Transfer Tracker
 - o Review the BOR Tracker on Monday.com and what information is contained in the boards.
- Renewals
 - o Who is responsible for renewals and how they will be handled.
- Account Deprecation
 - o How the AP will be notified, what the deprecation process involves, and our requirement to inform us once account deprecations are complete.

The Slide Deck is here:



[Link to PowerPoint](#)

Next Step: Completed BOR Process

<https://acrisure.sharepoint.com/:p/:r/sites/VEN-CTR-AcrisureAdvantagelns.Services2/Shared%20Documents/Shared/1.%20ONEDRIVE%20Collaboration/Onboarding/0.%20Templates/Kickoff%20Materials/Kickoff%20Presentation%20Template%206.21.24.pptx?d=w91266f90c78b44ffacc>

Friday, June 21, 2024 8:48 AM

RSP Ease & Suvaun Builds

Monday, April 8, 2024 9:26 AM

Once the final data file is received from the Project Manager, we will review for any missed required information that RSP may come back and have questions on. See below...

Columns to review:

- Client Name
- SIC codes (***may not be initially provided***)
- Clear Policy Descriptions
- FEIN codes (***may not be initially provided***)
- Policy Numbers
- Policy Eff/Exp Dates
- EB Producer
- Look for any groups that should not be in this transfer (*ex. A NY group should not be included with the NW Platform Block Transfer*)
- Rating Areas

Plans that won't need to be built in Suvaun:

- GAP Plans
- POP
- FSA
- Wrap doc

Email Template: [Ease/Suvaun Build Email Template](#)

Send build email-

- To:
 - Tushar Sarkar (tsarkar@acrisurellc.com **AND** tushar_sarkar@resourcepro.in)
- Cc:
 - Mike Feldman
 - Taylor Montgomery
 - Assigned Project Manager (TBD)
 - Noelle Cardiel
 - Sharada Chandra (sharada_chandra@resourcepro.in)
 - Akhilaa Hariharan (akhilaa_hariharan@resourcepro.in)

NOTE ON EMPLOYEE NAVIGATOR: We are not going to rebuild groups in EASE if they are already in Employee Navigator. Some AM's on AST side (see list below) have access/getting access to Employee Navigator. The groups will have to be built in Suvaun since they can't be pushed to Suvaun from Employee Navigator and vice versa.

Employee Navigator Access:

- Jason Naville (TL)
- Makayla Andrade
- Amy Downer (AM)
- Charlotte Warren (AM)
- Christy DeRienzis (AM)
- Scott Esparza (CSR)
- Tori Amezcua (CSR)

Next Step: BOR Process

Ease

Friday, September 22, 2023 12:44 PM

Adding Groups into Ease

Thursday, July 27, 2023 2:11 PM

Step 1: Select Companies

The screenshot shows the Ease software interface with the 'Companies' tab selected. The main area displays a grid of recently viewed companies. Each company entry includes the name, status, and number of active employees. A 'View All Companies' link is located in the top right corner.

Company Name	Status	Active Employees
Veronica Test	Active	2 Active Employees
Dkabes, Inc. dba Dynamic Detailing	Inactive	0 Active Employees
Extreme Express Car Wash	Inactive	0 Active Employees

Step 2: Select Add Company

The screenshot shows the Ease software interface with the 'Companies' page open. It features a search bar, a status filter, and an 'Add Company' button. The 'Add Company' button is highlighted with a yellow box.

Step 3: Add Company Name, City, State, and Zip code.

The screenshot shows the 'Add Company' dialog box. It contains fields for Name, City, State, Zip, Agent, and Teams. The 'Name' field is filled with 'Jordyn Test'. The 'City' field is filled with 'Fredericksburg'. The 'State' field is set to 'Virginia'. The 'Zip' field is filled with '22407'. The 'Agent' field is set to 'Select'. The 'Teams' field is set to 'AAS Team'. A 'Continue' button is at the bottom of the form.

Field	Value
Name *	Jordyn Test
City *	Fredericksburg
State *	Virginia
Zip *	22407
Agent	Select
Teams	AAS Team

Step 4: Once on the Company home page, Click *Details*.

- Enter the Tax ID and SIC Code

The screenshot shows the 'Company Details' section of the 'Jordyn Test' company profile. At the top, there are tabs for Overview, Details (which is selected), Access, and Organization. Below the tabs, there are several input fields:

- Company Name: Jordyn Test
- Established: mm/dd/yyyy
- Website: example-website.com
- Federal Tax Id (EIN): 12-3456789
- Entity Type: Select
- Company Status: Demo
- SIC Code: 1234
- Nature of Business: Financial Services

At the bottom right of the form, there are three buttons: 'Deactivate Company', 'Delete Company', and 'Clone Company'.

Step 5: While still in the Company's Profile tab, click *Organization* and then *Edit*.

The screenshot shows the 'Organization' edit page for 'Jordyn Test'. The 'Organization' tab is selected in the navigation bar. The main section displays a single location entry:

Name	Employees	Address	Action	
Fredericksburg	HQ	0	Fredericksburg, VA 22407	Edit

At the top right of the organization list, there is a 'Add Location' button.

Step 6: Enter the Company's information into the fields shown here. Once you have entered the data into the corresponding fields, click *Save*.

Edit Location

Close

Name *
Fredericksburg

Address 1
123 Ease St ...

Address 2
Apartment #

City
Fredericksburg

State
Virginia ▼

Zip *
22407

County
County

Country
United States ▼

Phone
1234567890 ...

Fax
555-555-5555

Federal Tax Id (EIN) ?
123456789

Headquarters

Save

*If the Company has multiple locations, this is where they will be entered into their own locations.

Step 7: Now click **Settings** (located on the Company Profile level), then enter the **Company Name** into the Custom Domain text box and click **Save**.

The screenshot shows the 'Settings' tab selected in the top navigation bar. Under the 'Branding' section, there is a text input field containing 'jordyntest'. A large green 'Save' button is located below the input field.

**You may run into an instance where the company name is already taken, you will know this because Ease will highlight the text box in red and will tell you the name already exists. Skip this step and please make a note on the datasheet.*

Step 8: To add plan(s) into Ease, you will click the *Benefits* tab and then *Add Plan* in the Actions dropdown or from the middle of the page.

The screenshot shows the 'Benefits' tab selected in the top navigation bar. In the center, it says 'No Plans Found' with a small icon of two plants. Below it is a blue 'Add Plan' button. To the right, there is a 'Actions' dropdown menu with the following options: 'Add Plan' (highlighted in yellow), 'Add Plan from Library', 'Add to Plan Library', 'Check Rate Availability', 'Change Plan Type Order', and 'Delete Plans'.

Step 9: Complete the *Add Plan Details*, and click *Next* to move onto the *Eligibility* tab. Once the eligibility details have been entered, click *Add Plan*.

Add Plan

Close

1 Details 2 Eligibility

Type *
Medical

Admin Name *
2023 Kaiser Silver HMO

Display Name *
2023 Kaiser Silver HMO

Effective Date *
08/01/2023

Carrier *
Kaiser Permanente

Duplicate Plan
Select

Next

Add Plan

Close

1 Details 2 Eligibility

Policy Number
123456

Subgroup Number
SG-1234

Minimum Hours *
30

Waiting Period * ⓘ
FOMF 60

Waiting Period Type *
Days

Entry Date * ⓘ
First of the Month

Termination Date *
End of the Month

Back **Add Plan**

Step 10: Once the plan has been added, click the *Rates* tab, then click on the green *Actions* button and select *Set Rates from Library* from the dropdown menu. Select Ease Library and complete the required fields, as seen below, and click *Set Rates*.

Set Rates

Close

Disclaimer: Final rates and benefits are determined by the carrier. Neither Ease nor their partners are liable for incorrect rate information.

Effective Date 8/1/2023
Library Ease
Plan Type Medical
State Virginia
Carrier Kaiser Permanente
Rate Area VA07
Category Group
Plan KP VA Silver DHMO Plus 1800/40/Vision (pl...)

Set Rates

Step 11: Now select the *Contributions* tab. Change the Contribution Type to *Employer* and input the ER Contribution in the *Employee* tier as shown below. This step can only be completed if we are provided the contributions from the group.

2023 Kaiser Silver HMO

Jordyn Test > Plans

Profile Eligibility Rates **Contributions** Forms Documents

Contribution Details

Contribution Type ? Employer	Employee Max Percentage of Income ? Ex: 9.12% (Optional)
Contribution Detail ? Table	Spouse/Domestic Partner Surcharge Amount ? Ex: \$100.00 (Optional)
Employee	Contribution (\$/%) Employer Max (\$) \$0.00 \$0.00

***Repeat the steps above for additional groups.**

Removing a Group in Ease

Thursday, July 27, 2023 1:24 PM

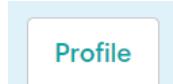
Scenario this is used for:

If a group has been lost, is dead on arrival, or has been mistakenly entered, the Onboarding Team will remove it in Ease.

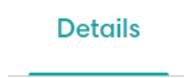
Note: For groups in a Block Transfer that have already been processed, removing the group in Ease is one part of the process that also includes inactivating the group in EPIC and also removing it in Suvaun. Please make sure to complete these additional steps in those cases.

Step 1: Look Up the *Group Name*

Step 2: Once Group has been pulled up, go to *Profile*



Step 3: Under Profile, Select *Details*



Step 4: Select *Deactivate Company* (see example below)



NOTE: Do NOT Delete Company. Use "Deactivate" button only

Example:

The screenshot shows a software interface with a navigation bar at the top. The 'Profile' tab is active. Below the navigation bar, there are four tabs: 'Overview', 'Details' (which is active), 'Access', and 'Organization'. The main content area is titled 'Company Details'. At the bottom left, it shows 'System Id: 634c9bea-97bd-4032-9103-1a6a57016065'. On the far right of the content area, there is a red-bordered button labeled 'Deactivate Company'.

AP Ease Authorization for AAS

Thursday, July 27, 2023 12:37 PM

Per EASE, we don't need to complete a specific authorization form, but just a letter on the AP's letterhead, or an email from one of the AP's officers, granting AAS permission to move groups that are already in Ease to the AAS EASE Account.

Ease Admins Only: Adding Employees to Acrisure Agency

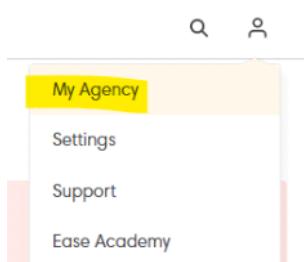
Monday, August 5, 2024 3:22 PM

Acrisure Ease Admins are Jordyn Merchant and Noelle Cardiel

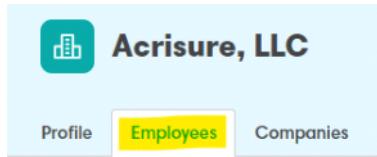
Step 1: On the home page, in the right hand corner click the person icon.



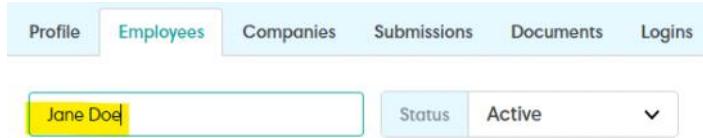
Step 2: Select *My Agency*



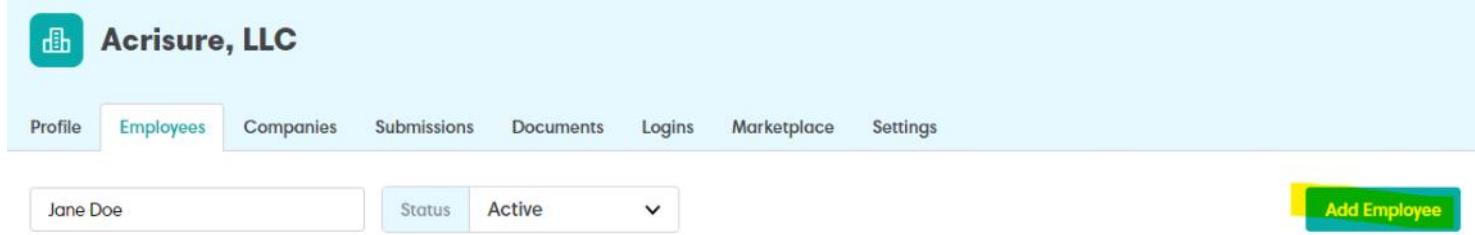
Step 3: Select the *Employees* tab



Step 4: Before adding new employee, search name of new employee you're about to enter to prevent duplicates.



Step 5: If nothing populates, Select *Add Employee*.



Step 6: Check box, and fill in all fields

Add Employee [Close](#)

You are over your maximum of 17 subscription seats. Each employee added will be billed as an additional seat at the rate of **\$85** per employee monthly.

Additional Seats may be added anytime. To remove billing costs for additional seats, please reach out to success@ease.com.

Are you sure you want to continue?

Yes, I agree

First Name *
First Name [X](#)

Last Name *
Last Name

Email
Email

Location
AAS Team

Teams
AAS Team

Add Employee

Step 7: Profile will populate, you will need to create a username for employee. (ex. First initial and last name)

Username
jmerchant

Step 8: To retrieve initial login password, Select *Reset Password*

Employee Information

Reset Password

Dialogue box will open, Select *Reset Password*, and temporary password will populate. Employee will use temp password for initial login but change after login.

Reset Password

[Close](#)

Are you sure you want to reset their password? Their current session will be disconnected and they will have to login again.

Reset Password

Ease/Suvaun Build Email Template

Tuesday, August 6, 2024 12:32 PM

Subject: RSP Project - [Project Name] Ease/Suvaun Builds

Hi Tushar,

Attached you will find our next block transfer file! There are some groups on the Clients tab that are missing SIC codes or addresses so please just make a note of those and we will work with our Account Managers to fill them in.

As always, please don't hesitate to reach out with any questions you may have.

Thank you all so much for your patience through these processes!

[Insert Signature]

NOTE: Add any project specific requests as needed

Recipients:

- **To:**
 - Tushar Sarkar (tsarkar@acrisurellc.com **AND** tushar_sarkar@resourcepro.in)
- **Cc:**
 - Mike Feldman
 - Taylor Montgomery
 - Assigned Project Manager
 - Noelle Cardiel
 - Sharada Chandra (sharada_chandra@resourcepro.in)
 - Akhilaa Hariharan (akhilaa_hariharan@resourcepro.in)

Suvaun

Friday, September 22, 2023 12:24 PM

Tuesday, August 22, 2023 4:14 PM

For any groups identified as already existing in Suvaun / Ease, once the group's policies have been confirmed BORd by Carrier you can request the import of these groups by our Suvaun counterpart Rebekah Pena and or Jordyn Merchant our Onboarding Ben Admin.

This process happens subsequently as the Groups can be imported from the AP's portal to ours.

If imported within Ease they will be pulled to Suvaun, however if imported into Suvaun it will be pushed to Ease.

In order to successfully import groups via Suvaun there are two factors that need to be determined:

1. Does the AP already use Suvaun as their quoting engine?
2. Are the Group ID numbers from the AP's Suvaun instance available to us?

If the answer to both of these questions is yes, the Onboarding Team will move forward with requesting to import the groups to our instance of Suvaun by reaching out to Rebekah Pena

For the groups to be imported from the AP's Suvaun portal to ours send the following information to Rebekah Pena at: rebekah.pena@acrisuretechnology.com

- The list of all the groups that are currently in Suvaun that need to be imported
- The name of the AP they are importing from and
- The existing client ID within the AP's Suvaun's portal

Per the Suvaun team importing groups from the AP's Suvaun portal to ours should not take longer than a week (with the exception of special circumstances i.e. may take longer during peak season (4th Quarter)

If importing groups from the AP's instance of Ease to ours simply send the following information to Jordyn Merchant our Onboarding Ben Admin at: jmerchant@acrisure.com

- List of the groups that are currently in Ease that need to be imported
- The name of the AP the group is transferring from
- If already known the name of the assigned Account Manager

Once this data has been received by Jordyn or the Onboarding Ben Admin from the Project Manager she will proceed to import the groups from the AP's Ease to ours

This procedure is for Groups that come to AAS in a One-Off BOR scenario. Once the final set of data is determined by the Onboarding Team, it is determined appropriate to begin building out and importing the Group to both Ease and Suvaun. This process happens simultaneously as the Groups can be input in Ease and then pushed to Suvaun.

In the event a one-off group already exists in either Suvaun or Ease they can follow the steps on the previous tab ([Suvaun_Ease Importing](#)), but if they happen to be brand new groups that don't exist in either Suvaun or Ease then they can proceed with the following procedure.

There are two factors that need to be determined up front when deciding how to treat groups that will be imported into Ease:

1. Does the AP already have Suvaun established for this group?
2. Are the Group ID numbers available for Suvaun?

Once these questions are answered, the Onboarding Team will move forward with the import. Groups are built out in Ease either by sending them to Resource Pro (RSP) or manually building groups out individually in the case of a One-Off BOR scenario.

Once Groups have been built in Ease, there is an option to push them to Suvaun.

[Please see the steps below for importing individual groups into Suvaun:](#)

1. Log in to Suvaun using your Acrisure ID and password at: <https://app.suvaun.com/>
2. After logging in you will be brought to a screen that will list Groups and looks like this:

The screenshot shows the Suvaun client management interface. At the top, there's a navigation bar with the Acrisure logo, a 'BETA' badge, and links for Benchmarking, Carrier Watch, Forms Library, Admin, Clients, and Help. Below the navigation is a search bar with placeholder text 'Search' and a magnifying glass icon.

The main area is divided into two sections: 'Clients' and 'All Clients'. The 'Clients' section displays a table of recent clients with columns for CLIENT, MARKET, BROKERAGE, EFFECTIVE, STATUS, and TEAM. Each row includes a 'View' button. The 'Recent' section shows 5 clients: Perkins Family Farms LLC, Northwest Window Treatments LLC, Pellegrini Brothers Wine Inc., Healthy Smiles Northwest, and Thiele Construction LLC. The 'All Clients' section shows 50 of 1247 clients, with filters for Effective Date, More Filters, and Reset filters, and a search bar.

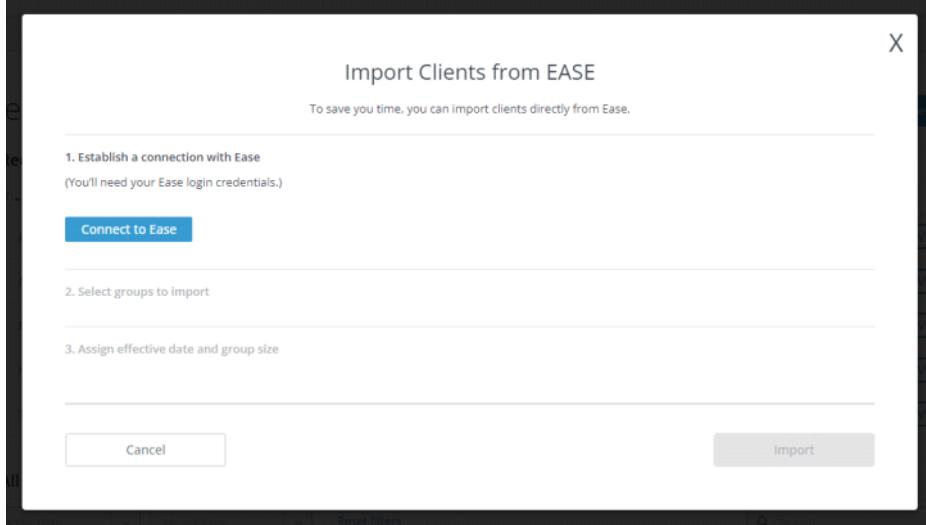
CLIENT	MARKET	BROKERAGE	EFFECTIVE	STATUS	TEAM
PF	SG	Acrisure Advantage Insuran...	11/1/23	Quoted	Shari Attebery
NW	SG	Acrisure Advantage Insuran...	11/1/23	Quoted	Shari Attebery
PB	SG	Acrisure Advantage Insuran...	10/1/23	RFP Submitted	Maritzia Aguilar
HS	SG	Acrisure Advantage Insuran...	9/1/23	Quoted	Antonio Islas
TC	SG	Acrisure Advantage Insuran...	11/1/23	Quoted	Shari Attebery

CLIENT	MARKET	BROKERAGE	EFFECTIVE	STATUS	TEAM
HS	SG	Acrisure Advantage Insuran...	9/1/23	Quoted	Antonio Islas
KV	SG	Acrisure Advantage Insuran...	9/1/23	Quoted	Antonio Islas

3. To import from Ease, you simply click this button:



4. You will need to connect your EASE account (with your Acrisure login credentials). Then you will select the groups you want to import.



5. The effective date and group size will be determined by the data from the groups you are importing. The effective date will be the date that the BOR will be renewed. You will need to have this information on hand in order to complete the entry.
6. Once this is finalized, the import will begin!

Removing Groups from Suvaun

Wednesday, January 31, 2024 1:16 PM

Email group name and removal request to Suvaun Support at support@suvaun.com.

EPIC

Friday, September 22, 2023 12:44 PM

EPIC Build (Automated Import)

Monday, April 8, 2024 10:40 AM

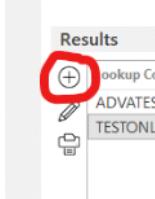
1. Once final approval is received, ADS PM sends EPIC Extract to ADS Systems Integration team for them to prep the file and send it to EPIC Build Team. ([See EPIC Build Process](#))
 - a. PM will be cc'd on the email to the EPIC Build Team
2. Once final file is sent to EPIC Build Team, PM will send Brian Lelio, AST Team Leads, and AM's assigned to the book a copy of the final file.

Next Step: RSP Ease & Suvaun Build

Manual EPIC Build for One-Offs

Thursday, June 29, 2023 2:31 PM

- From the Home Screen, navigate to Lookup from the top menu and search the group name to make sure the group isn't already in EPIC.
- From the Lookup Screen, click + icon.



- This will generate an Add Client Account pop-up window.
In the Type field select Insured from the dropdown and choose Business as the format.

- In the Business Name field type in company name.

- Click on the magnifying glass icon in the SIC field to search for SIC to find an appropriate SIC if one wasn't provided, otherwise just type the one the AP provided.

- Click on the magnifying glass icon in the NAICS field to search for NAICS to find an appropriate NAICS if one wasn't provided, otherwise just type the one the AP provided.

Acisure Digital Solutions

11242	Goat Farming
11194	Hay Farming
11221	Hog and Pig Farming
11292	Horses and Other Equine Production
11421	Hunting and Trapping
11331	Logging
11133	Noncitrus Fruit and Tree Nut Farming
11142	Nursery and Floriculture Production

BOR Model Procedures

SIC 0213
NAICS 11221

Account source
Agency
Branch

Extracted 5/12/2025

Type of Business

Finish Cancel
0.25s | SICNAICS

7. Update Account source field to AAS - Acisure Book Transfer

Account source **AAS - Acisure Book Transfer**

8. In the Agency and Branch dropdowns select 1DS

Account source **AAS - Acisure Book Transfer**
 Agency **1DS** **Acisure Digital Solutions, LLC**
 Branch **1DS** **Acisure Digital Solutions, LLC**

9. In the Business Type section uncheck the default selection (most likely Commercial) and check the box next to Benefits. Only Benefits should be checked.

Type of Business

Agriculture **Benefits** Bonds Commercial Financial Services Life & Health Personal Other

10. Type in Street Address

Address

1234 Charlotte's Web Lane

City	State	ZIP Code
Brooklin	ME	04616
County	United States of America	

11. Enter in Zip code and click the magnifying glass. This will provide you with a list of city/states with this zip code.

Address

1234 Charlotte's Web Lane
 Brooklin ME 04616 **Search**
 County United States of America

Description

12. Select the one that is correct and click OK.

ZIP Codes

Search where ZIP Code Begins With 04616 Find Clear Filter

Code	City	State	Description
04616	Brooklin	ME	Maine

OK Cancel
0.88s | ZIPPOST

13. Under the Primary Contact Information section add the primary contact information provided by the AP.

- First Name
- Last Name
- Email Address
- Primary Phone # (Select Business for type)

Primary Contact Information

Primary Contact Information

Prefix	First	Middle	Last	Suffix
Name	Templeton		Rat	
Formal		Informal		
Primary email	tratt@wilbursfarm.com			
Primary phone	Business (207) 222-3344			<input type="checkbox"/> SMS

14. Leave the Preferred Contact Method, Comments, Relationships alone. Add the applicable AP Source ADC at the account level.

Comments

Relationships

Agency Defined Categories

Search where Find

Category	Option
AP Source	1SO - Acisure South

15. Click continue.

Continue

Cancel

16. This will trigger a pop-up window for an activity:

a. In the Code dropdown list select ADIN. This will auto-populated add insured in the description field.

Add Activity

Category
Code ADIN
Description Add Insured
Who/Owner Employee

- b. Automatically defaulted to closed.

Open/Close

Status
Closed
Closed Successful
Reason
Actual time hrs mins
Actual cost

- c. Click Finish.

Detail

Finish

Cancel

RIS03_1_SERVICECENTER_PROD | 0.14s | ACTADD

17. Go to the Account Detail screen and click on the Servicing tab.

- a. Choose EB Producer 1 = 1DS House
b. Choose Servicer 1 = Assigned AM

Account Servicing Billing Confidential Client Access History Employee Benefits

Servicing Contacts

Employee	Description
P&C Producer 1	
P&C Servicer 1	
Surety Producer	

Account **Servicing** Billing Confidential Client Access History Employee Benefits

Servicing Contacts

Employee	Description
P&C Producer 1	
P&C Servicer 1	
Surety Producer	
Surety Servicer	
EB Producer 1	1DS House
EB Producer 2	
EB Servicer 1	Makayla Andrade
EB Servicer 2	

18. Go to contacts screen.
19. Double click on the accounts general contact info (business name) (not the primary contact (individual)).
20. Go to Identification numbers tab.

Contact Info Business Info **Identification Numbers** Payment Methods

Phone

21. Click + icon.
-
- Contact Info Business Info Identification Numbers Payment Methods
- Identification Numbers**
- (+) Type Description Identification Num...
- [X]

22. In the Type dropdown list select FEIN.

Add Identification Number

Type	Description
BIN	Business Identification Number
BN	Business Number
CRN	Company Registration Number
FEIN	Federal Employer Identification Number
NIN	National Insurance Number
RCN	Registered Charity Number
SIN	Social Insurance Number
SSN	Social Security Number
VAT	Value Added Tax Registration Number

23. In the Identification number field enter the FEIN/Tax ID.

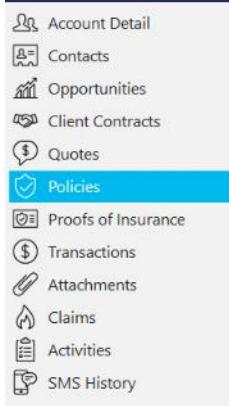
Add Identification Number

Type	FEIN
Description	Federal Employer Identification
Identification number	12-3456789

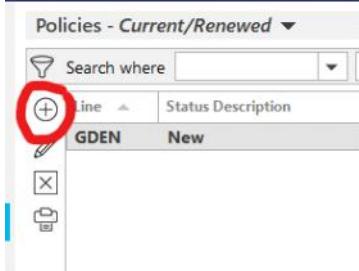
Add Finish Cancel

0.27s | BSCNADID

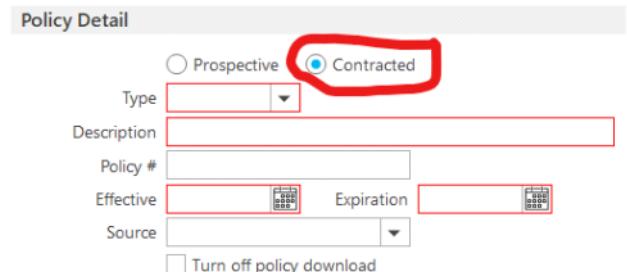
24. Click finish.
25. Got to Policies tab.



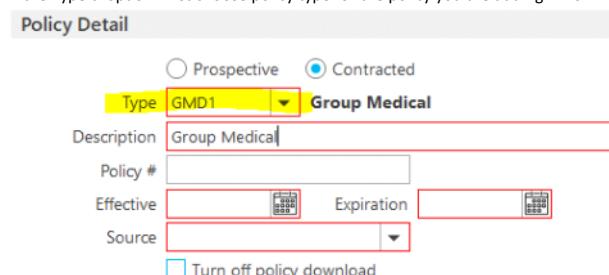
26. Click + icon.



27. Select the Contracted radio dial.



28. In the Type dropdown list choose policy type for the policy you are adding. This will auto populate description field, if there is a specific plan name type it in the description field otherwise leave default.



29. In the Policy # field type in policy #.



30. Type in effective date (Auto defaults the expiration date)

Policy Detail

Prospective Contracted

Type GMD1 ▼ **Group Medical**

Description Group Medical

Policy # 123456

Effective 11/1/2023 Expiration 10/31/2024

Source ▼

Turn off policy download

31. Under Source, choose AAS - Acrisure Book Transfer

Policy Detail

Prospective Contracted

Type GMD1 ▼ **Group Medical**

Description Group Medical

Policy # 123456

Effective 11/1/2023 Expiration 10/31/2024

Source **AAS - Acrisure Book Transfer** ▼

Turn off policy download

32. Under the Line of Business section leave the line field with what it defaulted to. (Should match what you selected in the policy detail section.)

Lines of Business

Line GMD1 ▼ **Group Medical**

Status ▼

Issuing location CA ▼ **California**

Agency bill Direct bill

33. In the Status dropdown list select REN.

Lines of Business

Line GMD1 ▼ **Group Medical**

Status REN ▼ **Renewal**

Issuing location CA ▼ **California**

Agency bill Direct bill

34. Issuing location field should default to the state listed for the group in the contacts section. If not, select it from the dropdown.

Lines of Business

Line GMD1 ▼ **Group Medical**

Status REN ▼ **Renewal**

Issuing location CA ▼ **California**

Agency bill Direct bill

35. Direct bill should be the default billing method if it isn't selected already please do so.

Lines of Business

Line GMD1 ▼ **Group Medical**

Status REN ▼ **Renewal**

Issuing location CA ▼ **California**

Agency bill Direct bill

36. In the Structure section on the right, Choose 1DS for Agency & Branch.

Structure

Agency	1DS	Acrisure Digital Solutions, LLC
Branch	1DS	Acrisure Digital Solutions, LLC
Department	<input type="button"/>	

37. For Department, choose the appropriate code for that policy (BES: 2-19 lives, BEM: 20-99 lives)

Structure

Agency	1DS	Acrisure Digital Solutions, LLC
Branch	1DS	Acrisure Digital Solutions, LLC
Department	BES	Benefits - Small

38. In the Lines of Business section, for the profit center field select the applicable originating platform profit center.

Profit center	ISO	Acrisure South
Issuing company	Code	Name
Premium payable	CA	ADS National 1GL Acrisure Great Lakes 1MA Acrisure Mid Atlantic 1MW Acrisure Midwest 1NE Acrisure New England 1NJ Acrisure New Jersey 1NW Acrisure Northwest 1NY Acrisure New York 1SE Acrisure Southeast 1SO Acrisure South
Payable contract		
Agreement D		
e/amount		
amount		

39. In the issuing company dropdown list select issuing company. If you aren't sure which one to choose ask for help.

Profit center	AAS	Acrisure Advantage Insurance Services
Issuing company		
Premium payable	CA	ACEF11 ACE Fire Underwriters Insurance Company ACEPR1 ACE Property And Casualty Insurance Company ACUA02 Acuity, A Mutual Insurance Company ADIN1 Adirondack Insurance Exchange ADMIN1 Admiral Insurance Company AETHE1 Aetna Health Insurance Company AFLAM1 AFLAC American Family Life Assurance Company Of Colu... AIGPR1 AIG Property Casualty Company AIXSP1 AIX Specialty Insurance Company ALLAM1 All America Insurance Company
Payable contract		
Prefill		
Agreement D		
e/amount		
age/amount		

40. In the premium payable dropdown list select billing company. If you aren't sure which one to choose ask for help.

Profit center	AAS	Acrisure Advantage Insurance Services
Issuing company	AETHE1	Aetna Health Insurance Company
Premium payable	CA	ATIN1 AETNA INC ACUA01 ACUITY, A MUTUAL INSURANCE COMPANY ADIIN2 ADIRONDACK INSURANCE EXCHANGE AETIN1 AETNA INC AFLIN1 AFLAC INCORPORATED ALLC01 THE ALLSTATE CORPORATION ALLC02 ALLEGHENY CORPORATION ALLFI3 ALLY FINANCIAL INC ALLSE1 ALLIANZ SE AMBFI1 AMBAC FINANCIAL GROUP Inc. AMEBU1 AMERICAN BUILDERS INSURANCE COMPANY RISK RETEN...
Payable contract		
Prefill		
Agreement D		
e/amount		
age/amount		

41. In the Line Commission field enter the commission percentage (from carrier).

Line Commission

<input type="checkbox"/> Use commission agreement	
Agreement	Agreement Details
<input type="checkbox"/> Override commission agreement percentage/amount	
Type	%
Percent	10
Amount	

42. Under the Line Estimated Premium/Commission section...

- a. Enter Line Estimated premium

Line Estimated Premium/Commission

Premium	\$25,000.00
Commission	<input type="text"/>
<input type="button" value="Calculate"/>	

- b. Enter Line Estimated commission. (You can click calculate if you entered the percent in the step above and it will calculate the number for you.)

Line Estimated Premium/Commission

Premium	\$25,000.00
Commission	\$2,500.00
<input type="button" value="Calculate"/>	

- c. Click detail.

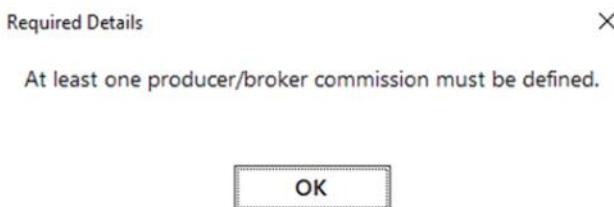
Detail	Finish	Cancel
.IS03_1_SERVICECENTER_PROD 0.15s POLADD		

43. Activity screen will pop up. Everything should be prepopulated for you.

44. For the status select the Closed radio dial.

45. Click Finished.

46. When you see this dialog box pop up click OK.



47. On the PR/BR Commissions tab click the + button.

48. Add PPAY for ADS

- Complete Commission Section
Pr/Br = PPAY
Code = H_1DS1

Percent = 0

Production Credit = 100

Order = 0

- b. Click Finish if there is not a commissionable producer or click Add if you also need to add a producer and follow instructions in step 49.

Commission

- Pr/Br: PPAY
- Code: H_1DS1
- Type: @
- Percent: 0.0000%
- Amount
- Production credit %: 100.0000%
- Order #: 0

Share Revenue

- Revenue %
- Agency
- Branch
- Department
- Profit Center

Add | **Finish** | Cancel | 0.23s | SBLDBPRP

49. Add PPAY for Producer - Only if there is a Producer:

- a. Complete Commission Section

Pr/Br = PPAY

Code = Employee Code = Producer EPIC Code

Percent = Commission % from AP

Production Credit = 0

Order = 1

- b. Click Finish

Commission

- Pr/Br: PPAY
- Code: 100783
- Type: @
- Percent: 25.0000%
- Amount
- Production credit %: 0.0000%
- Order #: 1

Share Revenue

- Revenue %
- Agency
- Branch
- Department
- Profit Center

Add | **Finish** | Cancel | 0.23s | SBLDBPRP

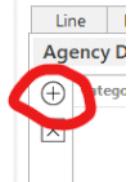
EXAMPLE:

Line	Billing	Servicing	Pr/Br Commissions	Categories/Histroy
Pr/Br Commissions				
<input type="button" value="+"/>	Pr/Br	Code	Name	Address
<input type="button" value="P"/>	PPAY	H_1DS1	1DS House	@ 0.0000% 100.0000% 0
<input type="button" value="X"/>	PPAY	M02797	Joseph Denton	@ 25.0000% 0.0000% 1
<input type="button" value="C"/>				

50. On the Line level screen go to categories/history.

The screenshot shows the Applied Epic software interface. On the left, there's a sidebar with various icons and links: Account Detail, Contacts, Opportunities, Client Contracts, Quotes, Policies, and a search bar. The main area displays 'Lines of Business' with a table showing a single row: Line (GDPP), Status Description (Renewal), Line Eff (01/01/2023), and Line End (01). Below this is a section titled 'Agency Defined Categories' with a table showing a single row: Category (AAS) and Option (Onboarding).

51. Click + icon.



52. Select agency defined category AAS-Onboarding and the appropriate AP Source for who the One-Off came from, click Finish

This screenshot shows the 'Agency Defined Category/Option' dialog box. The 'Category' column has 'AAS' selected. The 'Option' column shows several items: 'New Line of Coverage', 'Plan Design Change', 'Increased EE's', 'Onboarding' (which is highlighted with a yellow box), 'New Logo Sale', '1WC - Acrisure West', '1NJ - Acrisure New Jersey', '1NY - Acrisure New York', '1SO - Acrisure South', '1NW - Acrisure Northwest', and 'A.A.C.'. A yellow arrow points down to the 'AP Source' row, which is also selected. At the bottom, there are 'Finish' and 'Cancel' buttons, and a status message '0.18s | AGCYDEF'.

EXAMPLE:

This screenshot shows the 'Agency Defined Categories' screen. The 'Category' column has 'AAS' selected. The 'Option' column shows 'Onboarding'. The 'AP Source' row is also listed but is not selected.

53. Click x next to policy on left



54. In the screen that pops-up, check the yes perform action radio dial.

In Process Policy

Policy #	123456
Type	Group Medical
Term	7/1/2023 to 6/30/2024

This policy's stage is "In Process". Have you completed policy editing?

No, leave "In Process"
 Yes, perform action:

Finish **Cancel**

0.13s | POLINPRO

55. Select Issue/Not Issue Policy.

In Process Policy

Policy #	123456
Type	Group Medical
Term	7/1/2023 to 6/30/2024

This policy's stage is "In Process". Have you completed policy editing?

No, leave "In Process"
 Yes, perform action:

Action ▾
 Issue/Not Issue Policy
 Submit Application
 Update Stage to Submitted

Cancel

POLINPRO

56. Click Finish.

57. Click finish on the Issue/Not Issue Policy screen that pops up.

Policy number	123456	Effective	7/1/2023	<input type="button" value=""/>	Expiration	6/30/2024	<input type="button" value=""/>		
<input type="button" value="Line"/> <input type="button" value="Close Open Activities"/> <input type="button" value="Supplemental Screens"/>									
Line Detail									
Issue/Not Issue	Line	Line Description	Status Description	Bill	ICO	Pay	PPE	Policy Description	Prft Cntr
Issue	GMED	Group Medical	REN - Renewal	D	AETHE1	CA	AETIN1	Group Medical	AAS

Issue Not Issue Leave as submitted

Issuing company: AETHE1 **Aetna Health Insurance Company**
 Premium payable: CA **AETIN1 AETNA INC**
 Payable contract:
 Status: REN **Renewal**

Finish Cancel

1.09s | ISSUEAPP

58. Add BBR1 Activity

- On your keyboard, hit **F9**
- Make sure the "Add to" drop down shows **Account** so the activity is added at the account level
- Click Continue

Add Activity		X						
<input type="button" value="Add to"/> Account <input type="button" value=""/>								
Account Structures <table border="1"> <tr> <td>Agency Name</td> <td>Branch Code</td> <td>Branch Name</td> </tr> <tr> <td>1DS</td> <td>Acrisure Digital Solutions, LLC</td> <td>1DS Acrisure Digital Solutions, LLC</td> </tr> </table>			Agency Name	Branch Code	Branch Name	1DS	Acrisure Digital Solutions, LLC	1DS Acrisure Digital Solutions, LLC
Agency Name	Branch Code	Branch Name						
1DS	Acrisure Digital Solutions, LLC	1DS Acrisure Digital Solutions, LLC						
<input type="button" value="Continue"/> <input type="button" value=""/> Cancel		ACTADDO						

- Choose Code: **BBR1**
- Update Who/Owner: **Add applicable PM**
- Click **Finish**
- This activity stays open until the first BOR comes through and the group is welcomed. The Who/Owner of the activity will then be changed over to the applicable AM and the Follow-Up date is updated to today's date. That process is detailed here: [Completed BOR Process](#)

Inactivating Lost Groups

Thursday, June 29, 2023 3:19 PM

- Search for the group in EPIC.

The screenshot shows the 'Locate Criteria' interface. In the 'Account/Business name contains' field, '1010' is entered. Below the search bar, the results table displays one row for '1010HOL-01' with the account name '1010 Holdings'. Other columns include 'Business' (Insured), 'Client Type' (Active), and 'Address 1' (135 S River Rd.).

Lookup Code	Account Name	Business	Client Type	Account Status	Address 1	Address 2
1010HOL-01	1010 Holdings	Insured	Active		135 S River Rd.	

- Highlight said group and click Policies on the left hand side of the screen.

The screenshot shows the EPIC navigation sidebar. The 'Policies' option is highlighted with a red circle. The main pane shows the 'Locate Criteria' and 'Results' sections, with the result '1010HOL-01' also circled in red.

- Highlight the one of the policies

The screenshot shows the 'Policies - Current/Renewed' list. It includes a search bar and a table with columns: Line, Status Description, Effective, Expiration, Policy Number, Bill, ICO, Policy Description, and Marketed. Three entries are listed: GLIF (Renewal, 6/1/2023, 5/31/2024, 940243129, D, LINNA2, Lincoln: Life and AD&D Insurance), GLTD (Renewal, 6/1/2023, 5/31/2024, 940243130, D, LINNA2, Lincoln: Long-Term Disability Ins...), and GVIS (Renewal, 6/1/2023, 5/31/2024, 940243138, D, LINNA2, Lincoln: VisionConnect).

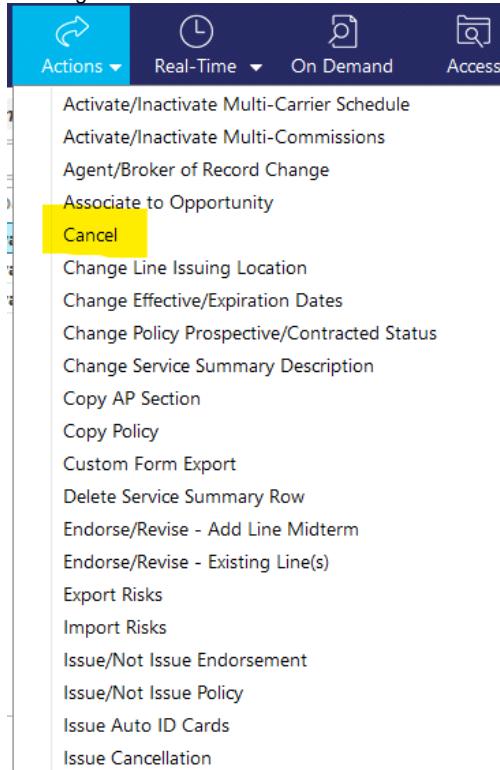
Line	Status Description	Effective	Expiration	Policy Number	Bill	ICO	Policy Description	Marketed
GLIF	Renewal	6/1/2023	5/31/2024	940243129	D	LINNA2	Lincoln: Life and AD&D Insurance	
GLTD	Renewal	6/1/2023	5/31/2024	940243130	D	LINNA2	Lincoln: Long-Term Disability Ins...	
GVIS	Renewal	6/1/2023	5/31/2024	940243138	D	LINNA2	Lincoln: VisionConnect	

- Click Actions at the top of the screen.

The screenshot shows the EPIC header with several buttons: Home, Locate, Actions (highlighted with a red circle), and Real-Time.

- In the dropdown click cancel.

The screenshot shows the 'Policies - Current/Renewed' list with a dropdown menu open over the first policy entry ('GLIF, Renewal'). The menu items visible are 'Cancel', 'Edit', 'Delete', and 'Details'.



6. In the Cancellation Effective field enter cancellation effective date

- If we never had them choose same date as line effective date.
- If we lost them after they were BORd to AAS, enter the date they were BORd to another agency.

Cancel

Type/Effective Date

Cancellation request Policy release

Cancellation effective 12:01 AM

Description

Policy

Policy # 123456
Type Group Dental
Term 7/1/2023 to 6/30/2024

Line(s) of Business

Line	Line Description	Status Description	Line Eff	Line Exp	ICO	PPE Type	PPE
<input checked="" type="checkbox"/> GDEN	Group Dental	NEW - New	7/1/2023	6/30/2024	MUTOF2	CA	MUTOF1

Detail Finish Cancel

0.55s | CANADD

7. Enter the cancelation description in the description field.

- For policies that never made it over to AAS put "Dead on Arrival"

Cancel

Type/Effective Date

Cancellation request Policy release

Cancellation effective 12:01 AM

Description

Policy

- For policies that were with us before we lost them put "Lost- [lost reason]"

Cancellation request Policy release

Cancellation effective 7/1/2023 12:01 AM

Description Lost- BORD to another Agency

8. Click Finish

Cancellation request Policy release

Cancellation effective 7/1/2023 12:01 AM

Description Dead on Arrival

Policy

Policy # 123456
Type Group Dental
Term 7/1/2023 to 6/30/2024

Line(s) of Business

Line	Line Description	Status Description	Line Eff	Line Exp	ICO	PPE Type	PPE
<input checked="" type="checkbox"/> GDEN	Group Dental	NEW - New	7/1/2023	6/30/2024	MUTOF2	CA	MUTOF1

Detail Finish Cancel

0.55s CANADD

9. An Add Activity screen will pop up.

Add Activity

Category

Code Acrisure Accounting Check Request Priority

Description

Who/Owner Employee Work group MONTA1 Taylor Montgomery

Detail

Update <input type="button" value="▼"/>	Issuing company <input type="button" value="MUTOF2"/> Mutual Of Omaha Insurance Company
Follow up/Start <input type="button" value="▼"/> at <input type="button" value="▼"/>	Premium payable <input type="button" value="CA"/> <input type="button" value="MUTOF1"/> MUTUAL OF OMAHA INSURANCE COMPANY
End <input type="button" value="▼"/> at <input type="button" value="▼"/>	Amount <input type="button" value="▼"/>
Reminder <input type="button" value="▼"/> at <input type="button" value="▼"/>	

Who to Contact

Name TEST ONLY Group, Inc Contact via Email

Open/Close

Status Open Closed
Closed
Reason
Actual time hrs mins
Actual cost

Note

Access level Public

Detail Finish Cancel

10. Click the code dropdown and choose the appropriate code below:

- CPOL- Lost policy if AAS had the policy but was then subsequently lost.
- CREW- Canceled- Rewritten if the policy was never ours, or if it was ours but we cancelled it and rewrote it somewhere.

Add Activity

Category

Code CPOL Acrisure Accounting Check Request Priority

Description of Policy Change

Add Activity

The Description will auto populate once you select the code.

11. In the Open/Closed section select Closed.

The Description will auto populate once you select the code.

12. At the bottom right of the screen click Finish.

13. Click Actions at the top of the screen

Policies - Current/Renewed

Line	Status Description	Effective
GLIF	Renewal	6/1/2023
GLTD	Renewal	6/1/2023

14. Click Issue Cancellation.

- Activate/Inactivate Multi-Carrier Schedule
- Activate/Inactivate Multi-Commissions
- Agent/Broker of Record Change
- Associate to Opportunity
- Cancel
- Change Line Issuing Location
- Change Effective/Expiration Dates
- Change Policy Prospective/Contracted Status
- Change Service Summary Description
- Copy AP Section
- Copy Policy
- Custom Form Export
- Delete Service Summary Row
- Endorse/Revise - Add Line Midterm
- Endorse/Revise - Existing Line(s)
- Export Risks
- Import Risks
- Issue/Not Issue Endorsement
- Issue/Not Issue Policy
- Issue Auto ID Cards
- Issue Cancellation**
- Issue Motor Vehicle Liability Insurance Cards
- Process Downloaded Policy Suspense Item
- Reinstate
- Remarket
- Renew
- Review Application
- Review Change Request
- Send CSIO eSlip
- Submit Application
- Submit Cancellation
- Submit Change Request
- Update Renewal Stage
- Update Stage to Submitted

15. In the Status Description field select cancelation description that matches the situation. For policies that were dead on arrival (AAS never had them) select Created in error.

Line	Line Description	Status Description	Bill	ICO	PPE Type	PPE	Policy Description
AUTO	Personal Autom... NEW - New Policy	New Policy	A	ACEIN1	CA	ACEIN1	Personal Package
HOME	Homeowners NEW - New Policy	New Policy	A	ACEIN1	CA	ACEIN1	Personal Package
INLM	Inland Marine /... NEW - New Policy	New Policy	A	ACEIN1	CA	ACEIN1	Personal Package

Status description: **New Policy**

Finish Cancel | 0.63s | ISSUECAN

16. Click Finish

17. Go to Policy Detail.

Contracted

Type: GDEN Group Dental

Description: Group Dental

Policy #: 123456

Effective: 7/1/2023 Expiration: 6/30/2024

Source:

Turn off policy download

Policy Premium/Commission

Premium	Commission	Balance
Billed Annualized	Billed Annualized	Agency \$0.00
Estimated	Estimated	
\$20,000.00	\$2,000.00	
Estimated monthly	Estimated monthly	
Downloaded	Calculate	

18. In the Policy # field type in DNU_ in front of the policy number (DNU=Do Not Use)

Contracted

Type: GDEN Group Dental

Description: Group Dental

Policy #: **DNU_123456**

Effective: 7/1/2023 Expiration: 6/30/2024

Source:

Turn off policy download

Policy Premium/Commission

19. Repeat steps 3-17 for each policy that needs termed.

20. Click Activities to go to the Activity screen to check to make sure there aren't any open activities.



Home ▾ Locate ▾ Actions ▾ Real-Time ▾ On Demand ▾ Access ▾ Links ▾ myEpic ▾ SMS ▾ Help ▾

Activities - Open

Code	Description	Priority	Who/Owner	Follow Up/Start	End	Association
APOL	Added TEST GDEN policy effective 7/1...	Normal	Makayla Andrade	06/08/2023		Policy

Search where ▾ ▾ Find

Page 1 of 1

21. Close any that are open.
 - a. Double click on the activity to be closed
 - b. Select the Closed radio button.
 - c. Choose Successful Closed dropdown menu.
 - d. Click Finish.

Open/Closed

Status	<input type="radio"/> Open	<input checked="" type="radio"/> Closed
Closed	Successful	
Reason		
Actual time		hrs
Actual cost		

22. Repeat step 21 for each open activity.

23. Go to Account Detail page

Account Detail

Home ▾ Locate ▾ Actions ▾ Real-Time ▾ On Demand ▾ Access ▾ Links ▾ myEpic ▾ SMS ▾ Help ▾

Activities

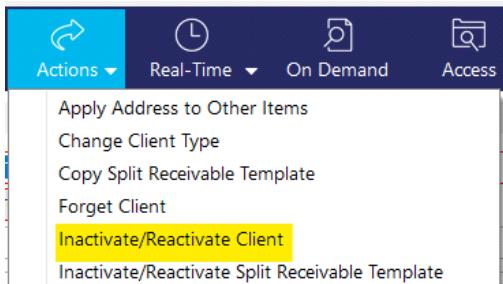
- Contacts
- Opportunities
- Client Contracts
- Quotes
- Policies
- Proofs of Insurance
- Transactions
- Attachments
- Claims
- Activities
- SMS History

24. At the top of the screen click Actions.

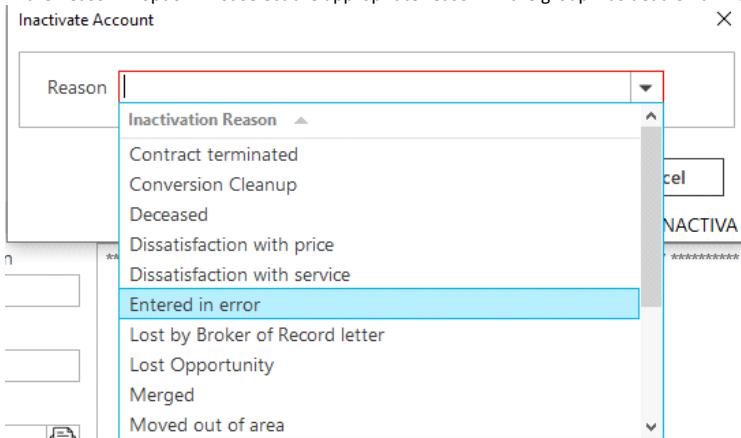
Locate Actions Real-Time On Demand

Home ▾ Locate ▾ Actions ▾ Real-Time ▾ On Demand ▾

Account



26. In the Reason Dropdown list select the appropriate reason. If the group was dead on arrival/we never had the group select entered in error.



27. Click Finish.



28. If you want to go a step further you can enter a note in the comments field Example: 6/29/2023- inactivated -Dead on Arrival

Account

Account name	TEST ONLY Group, Inc.	Type	Inured
Lookup code	TESTONL-01	Balance	\$0.00
Account source	AAS - Self	<input type="checkbox"/> Do not purge	
Type of business	<input type="checkbox"/> Agriculture <input checked="" type="checkbox"/> Benefits <input type="checkbox"/> Bonds <input type="checkbox"/> Commercial <input type="checkbox"/> Financial Services <input type="checkbox"/> Life & Health <input type="checkbox"/> Personal <input type="checkbox"/> Other		

Address

Description	Structure								
Site ID	<table border="1"> <tr> <td>Agcy Code</td> <td>Agcy Name</td> <td>Brch Code</td> <td>Brch Name</td> </tr> <tr> <td>AAS</td> <td>Acrisure Advantage Insur...</td> <td>AAS</td> <td>Acrisure Advantage Insu...</td> </tr> </table>	Agcy Code	Agcy Name	Brch Code	Brch Name	AAS	Acrisure Advantage Insur...	AAS	Acrisure Advantage Insu...
Agcy Code	Agcy Name	Brch Code	Brch Name						
AAS	Acrisure Advantage Insur...	AAS	Acrisure Advantage Insu...						

Phone Numbers/Email/Website

Number	Description
Phone	
Permission	
Fax	
Permission	
Account email	
Website	

Comments

***** THIS ACCOUNT WAS CREATED FOR TESTING PURPOSES ONLY *****

Relationships

Related Account	Relationship Type	Role
-----------------	-------------------	------

No items found

Clearing Open File Error

Friday, September 15, 2023 8:41 AM

Open files being detected by Epic, even when there isn't one actually still open, is a known issue for Applied and they have a Product Modification Request in place to fix the issue, but we don't have an ETA for when a permanent fix will be in place. A preventative measure Applied has suggested is open Acrobat Reader. Access Edit, Preferences, General and uncheck Show me messages when I launch reader. Save the change and close Acrobat Reader. There is also a workaround. To close that screen without having to close Epic completely, follow the steps below:

1. Click on the Windows logo in the lower-left corner of your desktop.
2. Type "task" and select the Task Manager.
3. In the Task Manager, there will be several options labeled "Applied Systems, Inc"
4. Click the arrow next to Applied Systems, Inc and it will dropdown and show which screen of Epic it is attached to.
5. Find that arrow that is attached to the account screen you are trying to close and select it.
6. Click End Task on the bottom-right side of the window and it will close the screen without logging out of Epic.

GA Identification

Friday, August 23, 2024 8:30 AM



GA Identification in Epic

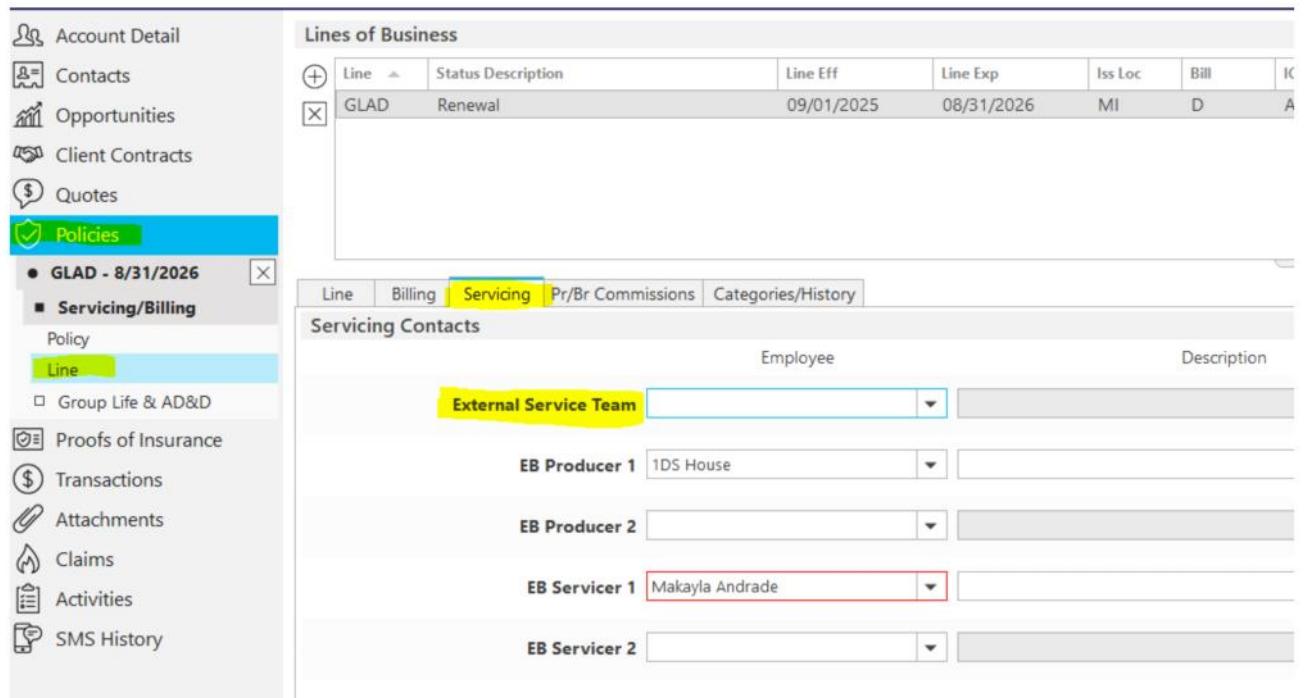
Taylor Montgomery

From: Katie Jones
Sent: Monday, August 19, 2024 12:55 PM
To: Veronica Larin
Cc: Brian Lelio; Mike Feldman; Taylor Montgomery; Ashley Hirschmann
Subject: GA Identification in Epic

Good afternoon,

Please see the screenshots below which shows where the GA can be added to policies in 1DS Epic.

Let us know if any GA's are missing from the list below (second screenshot). This should be filled in on any policies that have a GA.



The screenshot displays the 1DS Epic software interface. On the left, a sidebar menu lists various modules: Account Detail, Contacts, Opportunities, Client Contracts, Quotes, Policies, GLAD - 8/31/2026, Servicing/Billing, Policy, Line, Group Life & AD&D, Proofs of Insurance, Transactions, Attachments, Claims, Activities, and SMS History. The 'Policies' module is selected and highlighted in blue. In the main workspace, the 'Lines of Business' section shows a single row for 'GLAD' with a status of 'Renewal', effective date '09/01/2025', and expiration date '08/31/2026'. Below this, the 'Servicing Contacts' section is visible, featuring tabs for Line, Billing, Servicing (which is selected), Pr/Br Commissions, and Categories/History. Under the 'Servicing' tab, there are four dropdown fields: 'Employee' (set to 'External Service Team'), 'EB Producer 1' (set to '1DS House'), 'EB Producer 2' (empty), 'EB Servicer 1' (set to 'Makayla Andrade'), and 'EB Servicer 2' (empty).

External Service Team	Name	Code
EB Producer 1	Carrier Service Center	SERCA1
	GA - Benefitmall	GABMA1
EB Producer 2	GA - Emerson Reid	GAEME1
	GA - GBL*	GAGBL*
EB Servicer 1	GA - Martin Insurance Service	GAMAR*
	GA - None	GANONE
EB Servicer 2	GA - PGM *	GAPGM*
	GA - Savoy Associates	GASAV1
	GA - Suvaun *	GASUV*
	GA - Warner Pacific	GAWAPA

Katie Jones

Systems Implementation Analyst
Acrisure Digital Solutions



Email: CatJones@Acrisure.com

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*This is the BOR change process for policies written with all carrier except for carriers that don't allow for block transfers (Example: Centene & HealthNet). For carriers that don't accept block transfers see [Manual BOR Change Request](#) page.

Onboarding Team Process

- Once the EPIC Build Team has built the structure in EPIC for the AP/Platform, send the final data file to Reg. Affairs.

Template: [AP Name Block Transfer Request \(To Reg Affairs\)](#)

Note: The only columns Reg. Affairs wants on the data file we send them are the following

- AP's name
- Account name (policy holders name)
- Main policy number
- Policy/Line Type (Medical, Dental, etc)
- Billing carrier/Premium Payable Name
- Platform/AP Account Manager's name
- ADS Account Manager's Name

- If your block transfer has policies with United HealthCare (UHC), send a spreadsheet with Group Names, policy numbers, originating Broker name using the templates below to marisa_l_garvey@uhc.com cc'ing Reg. Affairs (Ezekiel, Lee & Leeah) & Brian Lelio.
 - [UHC BOR Policy List Template](#)
 - [Project Name_Acisure Digital Solutions UHC BOR Expedition Request Template](#)
- Work with AP/Platform to answer any questions or gather any missing data Reg. Affairs may have.
- Check back daily to see if any BOR's have been processed. (Takes Reg. Affairs about a week to get the file ready and added to the BOR Tracker)
 - You will know a BOR is complete when the completion date and effective date columns have dates in them and the row is highlighted in gray.
 - **Example:**

Carrier / GA	Account	Group#	BOR / Transfer From	Action Required	Account Manager	Requested	Update Notes	Completion date	Effective Date
Aetna U.S. Healthcare	Crosswater Community Church	190826	Sound Benefit	BOR to AAS			9/6/23 - EP - Carrier confirmed BOR request, 9/5/23 - Sent carrier assignment of compensation form. 8/25/23 - EP - Initial request sent	9/6/2023	9/1/2023
AWB HealthChoice	Echelbarger Excavating	9509940	Sound Benefit	BOR to AAS			8/31/23 - EP - Carrier confirmed BOR transfer, 8/25/23 - EP - Initial request sent	8/31/2023	9/1/2023

- When a BOR is completed go to [Completed BOR Process](#) and complete the steps outlined there.

Reg Affairs Process

Note: Throughout the process, if they need any additional data they will send that request to the OB PM assigned to the block transfer (This is true throughout the process).

- Reviews the list and "cleans" it up.
- Splits the list of carriers among themselves.
- BOR Tracker Spreadsheet is created
 - [Link](#)
 - Color Key

Completed
On Hold- Contract with Legal for Review
Need Contact
Pending AP Action
Pending RA Action
Termed Policies*
- *Termed policies will not have a completion or effective date on the tracker, but a note will appear in the notes column.
- Carrier contacts search
- BOR letter created
- Send BOR letter to carrier's
- Once carrier reaches out they may ask for paperwork to be completed
 - 9 out of 10 times we have to complete appt process
 - Once ADS is appointed a login can be created.
 - Ezekiel sends carrier registration back to Bethany to register for login, or if it needs info Reg. Affairs only has it gets sent back to them to finish registration.

8. If new contract required, Reg. Affairs checks master contract spreadsheet to see if there is a master contract.
 - a. Not a lot of these
9. If no master contract, the contract goes to legal to review & negotiate
10. Legal executes contract
11. Legal sends executed contract to Reg. Affairs team
12. Reg. Affairs then reaches back out to carrier to start the BOR s
13. Follow up with carrier's on BOR (weekly)
14. Once they receive confirmation from a carrier that the BOR to ADS is complete they will add the completion date and effective date of the BOR in the tracker and highlight it gray.
15. Reg. Affairs asks the carrier after confirmations come in how long the turnaround is for the policies to appear in the portal.
16. Reg. Affairs will forward carrier's response to AASOnboarding inbox.

Note on Carrier Login Process:

If the login is in Brian's name:

1. Ezekiel sets that up for us
2. CSR's verify that the login works
3. They add it to LastPass

If the login is for ADS:

1. Ezekiel sends the login or registration email to Bethany
2. Bethany sets up the login
3. Bethany adds it to LastPass

Next Step: AM Introduction Call

Manual BOR Request Process

Thursday, August 24, 2023 3:51 PM

For any groups that are written through HealthNet, Centene or any other carrier that does not allow block transfers a manual BOR will need to be processed.

1. Please use the link below to access the BOR template. Fill in the required data and send it to the AP to obtain the client signature and have them return it to you for submission to the carrier.
[Manual BOR Template](#)

2. Once you have received the signed BOR submit it to the carrier.

i.e. HealthNet / Centene

(Because Centene owns HealthNet all submissions can be sent to the same email address)

enrollmentunit_north@healthnet.com

Completed BOR Process

Wednesday, May 24, 2023 1:56 PM

[Link to Reg Affairs Tracker](#)
[AAS - Policies to be transferred - Tracker.xlsx](#)

Goal:

- Once a BOR is completed, it needs to be noted in Epic and on the finalized data template for that AP
- If the completed BOR is the 1st one for that group, our welcome email needs to be sent out and the BBR1 activity originally opened with the import needs to be transferred over to the AM so they know to initiate contact with the group
- If the completed BOR is not the first for that group, we just need to note it in Epic and on our master list

Process:

- Complete [Monday.com BOR Tracker Import](#) process.

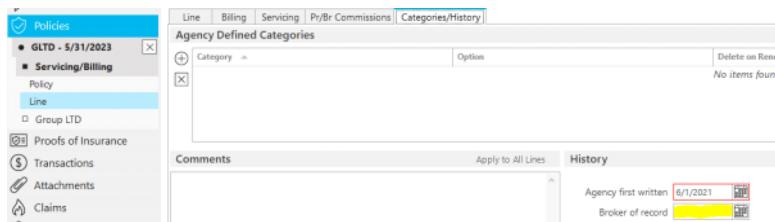
- Determine which groups need the Welcome Letter sent to them.
 - This happens when the first policy BOR confirmation is received for a group.

- Send welcome email to the groups.

Note: See [Welcome Email Procedure Instructions & Documentation](#) for more detailed instructions for sending welcome email.

- Find the policies on the Monday.com BOR Tracker that need to be processed in EPIC.
 - These are the ones that have a completion date and effective date, but the EPIC Doc. Status still shows Not Started.

- Find each policy in Epic and enter the effective date from the Monday.com BOR Tracker in the "Broker of record" field on the Categories/History tab at the line level.

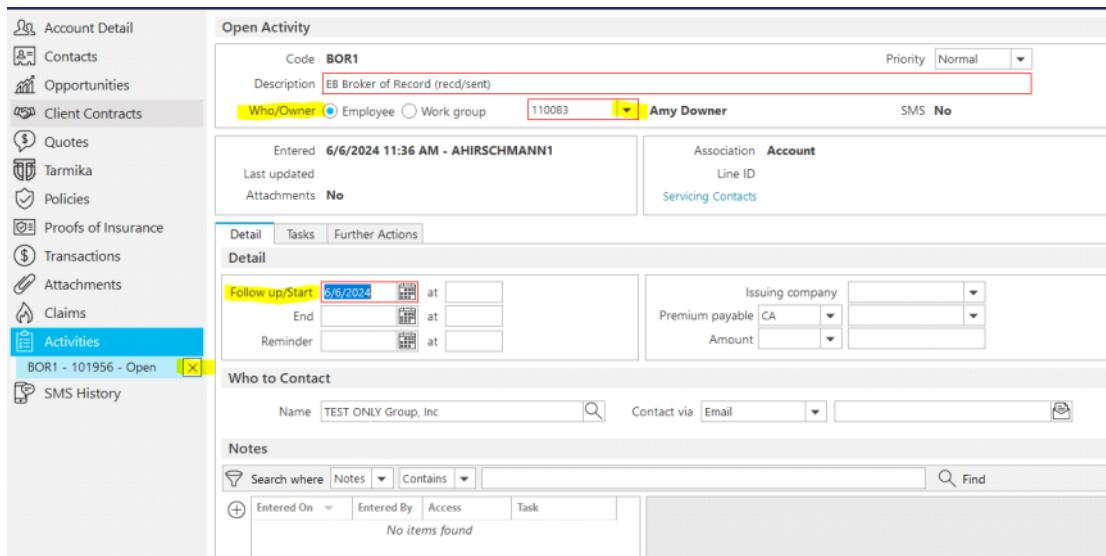


- On the Monday.com BOR Tracker, change the EPIC Doc. Status to Complete.

- Also on the Monday.com BOR Tracker, find the group name and if it is marked that the welcome email / activity has been done, **STOP HERE** as nothing else is needed. If it's not marked, move on to the next steps.

- In Epic, drag and drop the sent email from Outlook to that group's account, uncheck the "Delete Original after Attaching" button, and name it "Welcome Email to GRP from OB Team".

- Still in Epic, open the existing BBR1 activity and change the Who/Owner to the AM on that account and change the date to today's date. Click the X on the left to close out of the activity.



- Go back to the Monday.com BOR Tracker.

- Change the status of Welcome Letter/BOR Activity Status to either Sent (if email address for group is on file) or Unable to Send (if there is no email address on file for the group).

Next Step: Quality Review

[REDACTED]

[REDACTED]

Goal:

- BOR's that slipped through the cracks or one-off situations in which case a group needs to be transferred to AAS are processed and followed up on in a standardized manner
- The completed BOR's are input into EPIC/Ease pulled to Suvaun and AM's are assigned.
- Appropriately track all BOR requests, even outside of Block Transfers

Process:

1. BOR request is received.
2. If not enough information is provided, email the AP asking for additional information. The template for this is located here:



BOR

Request f...

3. Determine the Group size. If it is over 20 lives, contact Veronica Larin about whether or not AAS will accept the group.
4. Once the Group is determined that it will be transferred to AAS, identify any policies that have upcoming renewals within the first 90 day window and inform the AP that they will be responsible for them.
5. Send the group information to Veronica Larin for Account Manager assignment along with a reminder that their Team will be responsible for creating the Group in EPIC manually.
*Also remind them to add the Onboarding ADC when they add the policies to EPIC
6. Send the Group data to Regulatory Affairs for processing. The following info must be included in this request:
 - a. Billing Carrier Name
 - b. Group Name
 - c. Policy Type
 - d. Policy Number
 - e. Effective Date
 - f. Any timeline urgency (if necessary)
7. Send the group information to RSP for entry into Ease and pull to Suvaun, if applicable as not all states are supported.
8. Review systems (EPIC, Ease & Suvaun) to ensure these tasks were completed.
9. Check for completion of BOR on Reg Affairs BOR Status Tracker.
10. Once a BOR is complete, move on to the [Completed BOR Process](#)

There are 3 different types of renewals.

1. Policy renews before BOR is processed by carrier
2. Policy renews after BOR is processed by carrier; Platform has already initiated renewal process with group
3. Policy renews after BOR is processed by carrier; Platform has not initiated renewal process with group

To Include:

- PM communication alert of upcoming renewals; included in weekly status update
- Screenshots of renewal communication from Platform

1. Policy renews before BOR is processed by carrier

- a. Platform-AM renews policy
- b. Platform-AM sends renewal documents to ADS PM
- c. ADS-PM attaches in EPIC & renews policy line

2. Policy renews after BOR is processed by carrier; Platform has already initiated renewal process with group

- a. Platform-AM notifies ADS-PM & ADS-AM of renewal
- b. Platform-AM coordinates with ADS-AM on renewal
 - This may include:
 - O Continuation of renewal
 - O Linking documentation in EPIC
 - O Executing Renewal
- c. ADS-AM attaches documents in EPIC.
- d. ADS-AM renews policy in EPIC

3. Policy renews after BOR is processed by carrier; Platform has not initiated renewal process with group

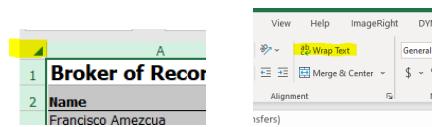
- a. ADS-AM renews policy with carrier
- b. ADS-AM attaches in EPIC
- c. ADS-AM renews policy in EPIC

Weekly BOR Status Reports

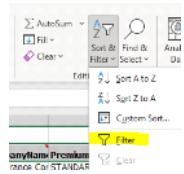
Thursday, June 1, 2023 9:48 AM

*UPDATED PROCESS STARTING 6/30/23

1. Generate the "Broker of Record Report" and save it in the shared folder (ONBOARDING/Weekly BOR Status Reports). When saving, add the date to the title (ex. "date_Broker of Record Report")
2. Open the report and make the following adjustments to make it easier for the SVC team to work with:
 - o Highlight the entire sheet by clicking in the top left corner then uncheck the Wrap Text option by clicking it twice.



- o Add a filter for row 2 by selecting the Filter option in the Sort & Filter dropdown



- o Save & Close

3. Email the report to the team using the email template saved in the same shared folder that the report was saved to. *Remember to attach the file & add your signature
Link to Email Template: [Weekly BOR Status Report Email Template.msg](#)

Group Adds Coverage During Block Transfer

Friday, April 5, 2024 12:12 PM

These instructions are on how to handle added coverage for a group that is part of an in-process block transfer to ADS.

1. Manually build policy in EPIC ([Instructions](#))
2. Send BOR request to Reg Affairs including the following information:

Premium Payable Carrier Name
AP/Platform Name
Account Name
Policy #
Policy Type
AP/Platform Account Manager's Name

3. Add policy to project's BOR Tracker in Monday.com
4. Add policy to [Onboarding Volume Board's](#) policy count for the project

Reminder: When sending out the next Status Update email for the project, remember to update the policy count and percentage complete.

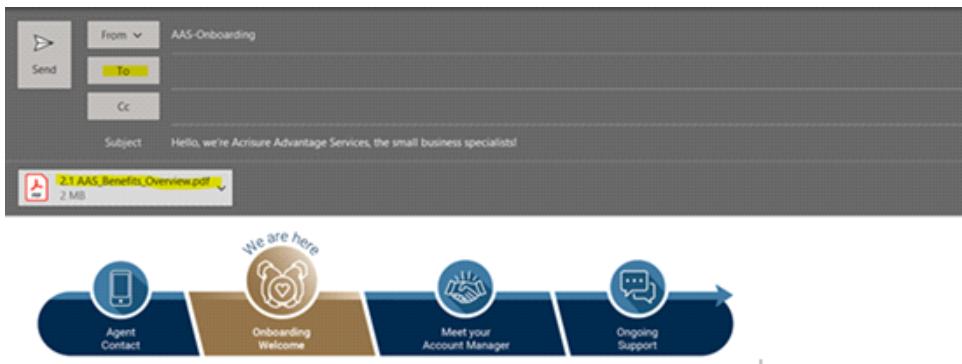
Welcome Email Procedure Instructions & Documentation

Wednesday, September 13, 2023 1:16 PM

1. Locate the email template: [1.ONEDRIVE Collaboration\Onboarding\0. Templates>Email Templates>Welcome Packet Email](#)
2. Select the template, "Hello we're Acrisure Advantage Services the small business specialists!"



3. Attach the "2.1 AAS_Benefits_Overview" file to the email
4. Open the excel datasheet, "AP - Block Transfer Tracker - date - PM"
5. Open AP- Full List of policies and find the group Primary contact in column L
6. Copy and paste email address



On behalf of our entire staff, we welcome you to the Acrisure Advantage Services family. We are so excited to show you everything we have to offer.

Before we tell you a little bit more about our services, we want to assure you of two important things:

- Your benefits will not be changing.
- You will not be required to do anything as this transition is completed.

What you will find with AAS is a team of small business specialists dedicated to protecting your business and supporting your growth:

1. Cost savings. The solutions available are budget-friendly and fix costs for 2 to 3 years.

Notes:

- Send from AASOnBoarding@acrisure.com
- No CCs but can send in bulk using BCC.

7. Send email

See [Completed BOR Process instructions](#) for how to document in EPIC.

Thursday, July 13, 2023 11:44 AM

1. Look up group in EPIC.
 - o You can search by Email address if the group's name is not in the inbox.

Example:

Locate Criteria

Locate account	Client	<input checked="" type="checkbox"/> Insureds	<input type="checkbox"/> Prospects
Locate by	Email Address	<input checked="" type="checkbox"/> Active	<input checked="" type="checkbox"/> Inactive
Email address begins with		VICKI@LANDEDGENTRY.COM	
Locate			

2. Go to servicing screen to determine who the account manager is for the account.
3. Forward on the responses to the account manager for them to take care of.

Email Body Template:

Hi [Account Manager],

Please see the email below that we received from one of your groups in response to the ADS Welcome Email.

This for the group: **[Account Name]**

Thank you

4. Move the group's response email to the folder labeled 6>Welcome Email Responses.

Weekly Project Plan Update

Monday, May 22, 2023 2:49 PM

Send a copy of the updated Implementation Plan to the AP using the email template saved in the folder shown below. Attach the BOR Tracker once BOR's start coming in.

Update the AP name in the subject line, customize the highlighted areas in the body, & add signature before sending.

Should be sent from your personal work email address. (Example: tamontgomery@acrisure.com)

Make sure to CC: Mike, Brian, Veronica, Jason, & ONB Team

OneDrive - acrisurellc.com > 1.ONEDRIVE Collaboration > Onboarding > 0.Templates > Email Templates > Project Status Email for AP				
Name	Status	Date modified	Type	Size
Word document icon 1DS_PolicyDeprecationProcess_QRGs	Cloud icon	3/14/2024 11:06 AM	Microsoft Word Document	1,627 KB
Email icon Weekly Project Status Update Email Tem...	Cloud icon	8/15/2024 4:52 PM	Outlook Item Template	95 KB

Suvaun Quality Review

Friday, September 22, 2023 12:24 PM

After Suvaun builds have been completed by RSP, a quality spot check of the basic information should be done throughout group intake list.

Information to check:

1. Market size: Small Group
2. BOR Status: Existing Client
3. SIC Code: May not be provided initially
4. Address
5. Select Products (ex. Medical, Dental, Vision)
6. Select Client Team: This should be the AM assigned to the group.

EASE Quality Review

Monday, September 25, 2023 10:17 AM

After Ease builds have been completed by RSP, all highlighted fields should be quality spot checked throughout group intake list.

Screenshot of the Company Details section in the EaseHR interface. The 'Details' tab is selected. Several fields are highlighted with yellow boxes:

- Company Name:** Jordyn Test
- Federal Tax Id (EIN):** 12-3456789
- SIC Code:** 1234
- Current Payroll Provider:** Select
- Interested in a Payroll Connection with Ease? :** Select

Buttons at the top right: Delete Company (red outline) and Clone Company (green).

★ SIC Codes may be provided by the AP at a later date if not initially provided.

Screenshot of the Security Access section in the EaseHR interface. The 'Access' tab is selected. Several fields are highlighted with yellow boxes:

- Agent:** Select
- Teams:** AAS Team
- Producers:** Select
- Company Admins:** Select
- Benefits Signatory:** Select

★ In order for a group to import over to Suvaun, there MUST be a valid address AND custom domain name. Multiple addresses are able to be added if group has multiple locations.

[Profile](#)[Employees](#)[Benefits](#)[Documents](#)[ACA](#)[EaseHR](#)[Payroll](#)[Logins](#)[Marketplace](#)[Settings](#)[Overview](#)[Details](#)[Access](#)[Organization](#)

Locations (1)

[Add Location](#)

Name

Employees

Address

Fredericksburg

HQ

0

Fredericksburg, VA 22407

[Edit](#)[Profile](#)[Employees](#)[Benefits](#)[Documents](#)[ACA](#)[EaseHR](#)[Payroll](#)[Logins](#)[Marketplace](#)[Settings](#)[Branding](#)[Optional Fields](#)[Custom Fields](#)[Email Templates](#)[Notifications](#)

Custom Domain

This is the URL your employees use to access Ease. Must be at least 3 characters in length.

jordyntest.ease.com

[Save](#)[View Login](#)

Once the EPIC builds / uploads have been completed you will need to verify that the following information is correct in EPIC for each group and that the following information is there:

1. Name
2. Address
3. Phone Number
4. At least the primary contact name, phone number and email address for the primary contact
5. FEIN
6. SIC / NAICS Codes (If provided)
7. Verify the Line Type
8. Check that the Effective Dates and Term Dates for the policies are correct
9. Confirm that the Group / Policy numbers are correct
10. The Bill Type
11. Issuing Company
12. Policy Description
13. Risks Insured (If provided by AP)
14. Issuing Location
15. Always confirm that the EB Producer is listed as: 1DS House
16. EB Servicer (ADS Account Manager)
17. BBR1 Activity has been added and is assigned to the PM

1-5 *On the **Contacts** section in EPIC you can verify the following: Group Name, Address, Phone Number, email address and FEIN as shown below

Name	Primary Phone	DNC	Department	Description	Primary/Main Business	Category	Client Portal Account
37 Panda Grove Inc.	(361) 881-9322				Main Business Contact	Both Contact & Policy	No
Nikole Smith	(361) 881-9322				Primary	Both Contact & Policy	No

6 To confirm the SIC & NAICS codes: From the Contacts section, double click the group name and then click into the Business Info Tab

The screenshot shows the Acrisure Digital Solutions software interface. The top navigation bar includes File, Edit, Areas, Home, Locate, Actions, Real-Time, On Demand, Access, Links, myEpic, SMS, and Help. The main menu bar has Home, Locate, Actions, Real-Time, On Demand, Access, Links, myEpic, SMS, and Help. The left sidebar menu includes Account Detail, Contacts (selected), Opportunities, Client Contracts, Quotes, Tarmika, Policies, Proofs of Insurance, Transactions, Attachments, Claims, Activities, and SMS History. The main content area displays a contact record for '37 Panda Grove Inc.' with address information (108 N Mesquite Street, Corpus Christi, TX 78401) and various business details. The 'Business Info' tab is active, showing fields for Business type, Number members/managers, Credit bureau name, ID number, Date business started, Nature of business, NAICS (72111), D-U-N-S, SIC (7211), Market type, Market size, Company revenue, Company payroll, and Company payroll cycle. To the right, there is a section for ELTO (Employer Identification Type) with fields for Exempt status, Employer Reference Number, and Employer type.

7-13 If you click into the Policies Section you can verify the following items:

- Check that the Effective Dates and Term Dates for the policies are correct
- Verify the Line Type
- Confirm that the Group / Policy numbers are correct
- The Bill Type (**the bill type should typically always be Direct**)
- Issuing Company
- Policy Description
- Risks Insured (If provided by AP)

File Edit Areas Home Locate Actions Real-Time On Demand Access Links myEpic SMS Help

Policies - Current/Renewed

Line	Status Description	Effective	Expiration	Policy Number	Bill	ICO	Policy Description	Marketed	Pay Contract Desc	Pay Contract Type
GMD1	Renewal	1/1/2024	12/31/2024	360006	D	BCBGO1	P621CHC			

Plan Detail

Contracted Effective 1/1/2024 - 12/31/2024 Type GMD1 - P621CHC Source AAS - Acisure Book Transfer SIC NAICS FEIN

Line Detail

Risks Insured 4 Est. Premium Est. Monthly Premium Est. Comm. Est. Monthly Comm.

Comments

Min Req Hours: 30 | Waiting Period: FOMF 60 Days | GA: n/a/n/a | ER's EE Cont Amt: 100% | ER's Dep Cont Amt: 100%

Service Summary

#	Entered	Action	Description	Stage	Effective	Stage Changed	Changed By	Entered By
1	01/22/2024	Renew	P621CHC	In Process	1/1/2024		Renee Ferguson	

14 Lastly to verify the Issuing Location and EB Servicer (ADS AM) from the Policies section double click the policy you want to review, Then click on the Servicing Tab and this is where you will be able to verify that the correct EB Servicer (ADS AM) has been entered

File Edit Areas Home Locate Actions Real-Time On Demand Access Links myEpic SMS Help

Policies - Current/Renewed

Line	Status Description	Effective	Expiration	Policy Number	Bill	ICO	Policy Description
GMD1	Renewal	1/1/2024	12/31/2024	360006	D	BCBGO1	P621CHC

click on line item and on the line tab you will be able to verify the Issuing Location

37PANDA-01 - 37 Panda Grove Inc.

File Edit Areas Home Locate Actions Real-Time On Demand Access Links myEpic SMS Help



Lines of Business

Line	Status Description	Line Eff	Line Exp	Iss Loc	Bill	ICO	PPE	Prft Cntr	Estimated Prem
GMD1	Renewal	01/01/2024	12/31/2024	TX	D	BCBGO1	HEACA1	ISO	

Line of Business

Line **GMD1 - Group Medical - Fully Insured**

Status **REN** **Renewal**

Issuing location **Texas**

Profit center **ISO** **Acrisure South**

Issuing company **BCBGO1** **BCBSTM Government Programs HMO (bcbs Of Texas)**

Premium payable **CA** **HEACA1** **HEALTH CARE SERVICE Corp, A MUTUAL LEGAL RESERVE CO**

Payable contract

Line Commission

Use commission agreement

Agreement **Agreement Details**

Override commission agreement percentage/amount

Type **%** **Percent** **4.3000%** Amount

Line Information

Line ID **4** Plan option name

Risks insured **4** Description

Total eligible **Description**

Premium

Billed	Annualized	Downloaded
Estimated		
Estimated monthly	Calculate	

Commission

Billed	Annualized	Downloaded
Estimated		
Estimated monthly	Calculate	

[Weighted Commissions](#)

Primary **Additional**

15-16 Then click on the Servicing Tab and this is where you will be able to verify that the correct EB Servicer (ADS AM) has been entered

*Please note that the EB Producer1 should always be 1DS House

37PANDA-01 - 37 Panda Grove Inc.

File Edit Areas Home Locate Actions Real-Time On Demand Access Links myEpic SMS Help



Lines of Business

Line	Status Description	Line Eff	Line Exp	Iss Loc	Bill	ICO	PPE	Prft Cntr	Estimated Prem
GMD1	Renewal	01/01/2024	12/31/2024	TX	D	BCBGO1	HEACA1	ISO	

Servicing Contacts

Employee	Description
External Service Team	
EB Producer 1 1DS House	
EB Producer 2	
EB Servicer 1 Joshua Lira	
EB Servicer 2	

Incl/Excl Selections		
Criteria	IncludeExclude	Selection
Region		All
Agency	Include	Match Any IDS Acisure Digital Solutions, LLC
Branch	Include	Match Any IDS Acisure Digital Solutions, LLC
Department	Include	Match Any BES Benefits - Small BEM Benefits - Middle BEL Benefits - Large
Profit Center		All
Account Type		All
Account Lookup Code		All
Activity Category		All
Activity Code	Include	Match Any BOR1 EB Broker of Record (recd/sent)
Who/Owner	Include	Match Any 102031 Joshua Lira
Follow up/Start Date		All
Status	Include	Match Any O Open S Closed - Successful
Date/Time Entered	Include	From 2/1/2024 Through 5/1/2024
Entered By	Include	Match Any EPICSDKUSER User For SDK Server
Association	Include	Match Any Account
Activity Notes		Include all activity notes
Activity Tasks		Include tasks - full detail
Work Group		All

Activity Report				
1	A	B	C	D
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If the Activity Report is blank this means you have successfully reassigned all of your BOR1 Activities to the assigned ADS AM

The following items will be audited by Ashley and Katie after the build:

Activity generated
Structure
ADC
Sources

****Premiums and Commission amounts will be verified and corrected if necessary by the assigned AM once they begin servicing the groups**

8. Outlier BOR's

Friday, September 22, 2023 12:24 PM

This procedure addresses scenarios in which a Block Transfer completion is held up over an extended period of time due to a small number of BOR's that are not processed in a timely manner in conjunction with the other BOR's involved in the Block Transfer.

This often happens when Carrier appointments need to be made by Reg Affairs or certain Carriers are taking longer to process BOR's than others but other scenarios can exist as well. It is up to the Project Manager to determine if such scenarios exist within their Block Transfer.

This procedure allows the Project Managers to move on to other projects, but also ensures that any Outlier BOR's continue to be processed by Reg Affairs, entered in EPIC, and the appropriate parties are notified upon completion.

For Block Transfer Project Manager:

Once a project reaches *over 90% completion AND all of the Welcome Letters* have been sent out to the Groups in the Block Transfer, the project can be reassessed for Outlier BOR's that have yet to be processed. This closeout process will only be initiated once all groups have received a Welcome Packet. This means that the Acrisure Digital Service Center will be actively servicing these clients.

At this point in the Block Transfer, the project can be considered closed and will transition to Outlier BOR status if the following conditions are met:

1. **The project is over 90% BOR completion status.**
2. **ALL of the Welcome Letters have been sent to the Groups.**
3. **There are still Outlier BOR's that Reg Affairs is continuing to process.**

If these conditions are met and the Project Manager determines that the Block Transfer is ready to be closed out, the final stages of the Block Transfer procedure are then initiated. *Please refer to the Close-Out Procedure for full details, however, a quick summary is provided below.*

Close-Out for a Block Transfer with Outlier BOR's includes:

- Final Quality Control review for EPIC, Ease, and Suvaun.
- Final Group count and updating of Monday.com project board with BOR status
- Updating of Monday.com Project Plan
- Send the final project close-out notification email to the AP/AAS Team/Leadership (*template provided in Onboarding folder*).
- Notify Reg Affairs if any Outlier BOR's exist and that the project is being closed out so they can treat those BOR's appropriately.

Once the Quality Control and Close-Out Email portions of the Block Transfer process have been completed, the project is now considered closed. At this point, the follow-up and regular maintenance of the remaining Outlier BOR's will transition to the Onboarding/Business Integration CSR.

Note: *It is essential to notify Reg Affairs that this project is being closed out and any remaining Outlier BOR's will be moved to a centralized tracker for continued processing, separate from the rest of the finalized Block Transfer.*

For Onboarding/Business Integration CSR:

These Outlier BOR's will be actively monitored and followed up on by the Onboarding/Business Integration CSR. They will be responsible for notifying AM's once these BOR's cross the finish line and sending an account depreciation notice to the

appropriate contacts at the Platform level.

The steps for monitoring and following up on these Outlier BOR's are described below:

(Please refer to training procedures on processing BOR's in EPIC for more detailed instructions)

1. Check Reg Affairs tracker daily on the "In Flight" tab to see if any new BOR's have been processed.
2. For new BOR's, please follow the steps to enter in EPIC.
3. Notify the assigned AM that the BOR has been processed.
4. Email the AP to notify them that the BOR has been finalized and this account can now be deprecated.
5. Record this in Monday.com board tracking the BOR's.
6. Update BOR completion percentage in the Project Plan for the corresponding Block Transfer to include newly processed BOR's from that day.

If questions arise on this process or if problems occur, please contact the Project Manager for the corresponding Block Transfer for additional assistance.

AP/Platform List

Tuesday, May 16, 2023 8:38 AM

Platform List

NAME	PLATFORM	WAVE DATE
1DS - Acrisure Digital Solutions, LLC (was AAS - Acrisure Advantage Services)	1DS	12/1/23
BAI - Bozzuto	1WC - Acrisure West (Filice)	11/6/23
BXA - BXA	1SW - Acrisure Southwest	4/7/25
MOR - Filice Moraga	1WC - Acrisure West (Filice)	11/6/23
PIH - Proco	1WC - Acrisure West	5/13/24
SAC - Filice Sacramento	1WC - Acrisure West (Filice)	11/6/23
SNJ - Filice San Jose	1WC - Acrisure West (Filice)	11/6/23
BAA - Bell-Anderson	1NW - Acrisure Northwest	2/5/24
IRG - Insurance Resource Group	1NW - Acrisure Northwest	2/5/24
SBS - Sound Benefits Services	1NW - Acrisure Northwest	2/5/24
ECH - Echelon	1SO - Acrisure South	4/15/24
CLI - Carlisle	1SO - Acrisure South	4/15/24
VIB - Vantreo	1WC - Acrisure West	11/6/23
GCH - GCH Insurance Group	1SE - Acrisure Southeast	5/6/24
BRI - Bria Insurance & Risk Consultants	1SO - Acrisure South	4/15/24
FIR - Frates Insurance & Risk Management	1SO - Acrisure South	4/15/24
ATP - Acrisure Texas Partners	1SO - Acrisure South	10/9/23
Acrisure Texas Risk Advisors	1SO - Acrisure South	10/9/23
LAR - Laris Insurance Agency	1SO - Acrisure South	4/15/24
GDP - GDP Advisors	1SO - Acrisure South	4/15/24

1SO - Acrisure South
1NY - Acrisure New York
1NJ - Acrisure New Jersey
1WC - Acrisure West
1SW - Acrisure Southwest
1NW - Acrisure Northwest
1SE - Acrisure Southeast
1GL - Acrisure Great Lakes
1MA - Acrisure Mid Atlantic
1MW - Acrisure Midwest
1NE - Acrisure New England
1DS - Acrisure Digital Solutions

Lines of Coverages

Tuesday, May 16, 2023 8:41 AM

- Medical
- Dental
- Vision
- Life AD&D (Accidental Death & Dismemberment)
- Cancer
- FSA (Flexible Spending Account)
- HSA (Health Savings Account)
- HRA (Health Reimbursement Account)
- LTD (Long Term Disability)
- STD (Short Term Disability)
- Hospital Indemnity

All these lines of coverage can be benefits that our clients (groups) may offer their employees

Waiting Periods

Tuesday, May 16, 2023 8:40 AM

FOMF (first of the month following) 30 days, 60 days, 90 days, FOMF or coinciding with, FOMF DOH

Commonly Used Abbreviations

Tuesday, May 16, 2023 8:41 AM

Abbreviation	Description
AAS	Acrisure Advantage Services
ADS	Acrisure Digital Solutions
AMS	Agency Management System
AOR	Agent of Record
AP	Acrisure Partner
ATNE	Average total # of employees
BDE	Bulk Data Extract
BKB	Brokerage Builder
BOB	Book of Business
BOR	Broker of Record
CRM	Customer Relationship Management system
COBRA	Consolidated Omnibus Budget Reconciliation Act
Comm	Commissions
DOA	Dead on Arrival
DOH	Date of Hire
EE	Employee
ER	Employer
FOMF	First of the Month Following
FSA	Flexible Spending Account
GA	GA = General Agent (Agency); Examples are Suvaun, etc.)
HRA	Health Reimbursement Account
HSA	Health Spending Account
KPI	Key Performance Indicator(s)
LOC	Line of Coverage (ie Medical, Dental, Vision, Life, etc)
MBR	Monthly Business Review
POP	Premium Only Plan
PR/BR	Producer Payable / Broker Payable (Pertaining to Commissions)
RA	Reg Affairs (Regulatory Affairs)
REA	Regional Enterprise Admin
RFP	Request for Proposal
ROI	Return on Investments
SLA	Service Level Agreement
TAT	Turn Around Time
TBD	To Be Determined

TPA	Third Party Administrator
UAT	User Acceptance Testing

Plan Funding Types

Wednesday, May 31, 2023 8:19 AM

Fully-insured (ACA)

The Employer purchases insurance from an insurance company, and it takes the risk of liability

- This plan is typically the most expensive type
- **Risk Level:** Removes the risk from the employee and employer and puts it on the insurance carrier
- **Premium Calculation:**
 - Premiums for fully-insured plans are determined by adding anticipated claims cost, administrative fees, applicable taxes and stop-loss coverage.
 - Small group (less than 50 employees) premiums are “community rated.” All groups with fewer than 50 employees in the same geographic area pay the same premium.
 - Mid-size group (50 to 100 employees) premiums are based on several factors, including age of employees and dependents, type of coverage offered, previous claims data, etc.
 - Large group (100+ employees) premiums are also based on claims history, size of the group, age of employees, number of dependents covered, etc.
 - At renewal, if the carrier determines that medical costs are exceeding the premiums collected, you will see an increase in premium.
 - Small group increases are based on the “pooled risk” of all individuals enrolled in the same plan. That means there is no consideration of the health of a group. While your group may be healthy with very few claims, another group may be much sicker and contributing to the increase in claims disproportionately. None of that matters, however, and all groups will be charged the same increase.
 - Mid-size group increases also consider the pooled risk but will take into consideration the group’s overall health. If your group is healthy and has what the carrier determines to be average or below average use of the plan, you could see more stable rates with limited increases.
 - Large group increases consider pooled risk as well as the cost of claims for your group. The carrier will evaluate all health and prescription drug claims, pointing out high dollar claims and the overall cost of your plan. Some groups with below average use may receive decreases in premium while groups with high dollar claims will see increases.

Self-Funded

The Employer sets aside some of their own money to mitigate risk

- This plan offers a higher chance of savings
- The employer determines the premiums based on an analysis of their company
- **Risk Level:** Puts most of the risk on the employer
- **Premium Calculation:**
 - The monthly premiums are based on multiple factors with the anticipation of covering all the plan's needs (administration, claims and stop loss coverage)
 - ◆ If you have had an increase in claims costs, premiums will need to increase. If you saw a decrease in claims costs, premiums may be adjusted. However, it is important to continue to build a reserve to cover unexpected expenses.
 - Technically this plan doesn't "renew" every 12 months, but it is evaluated to make sure expectations are being met and costs are adjusted as needed.
 - Factors Evaluated:
 - Claims
 - ◆ The plan contracts with a provider network each year to offer employees access to providers. You will need to evaluate whether the current network is sufficient. If changes are made, premiums may be affected.
 - Provider Network
 - ◆ The employer will examine claims from the previous 12 months to determine if the stop loss amount must be increased. At the same time, rates will be set by the carrier to cover unexpected losses and allow for changes in your employee population.
 - Stoploss Coverage
 - ◆ The employer will use a census of employees to create a cost projection and determine a flat monthly cost for the coverage.

Level-Funded

The company makes set payments to an insurance company or third-party per month, which creates a reserve fund for liabilities that arise. At the end of the contract, the company may be refunded surplus payments.

- Combines the fully-insured and self-funded plans
- Works best for small groups made of healthy individuals
- Not available in every state due to stop-loss regulations
- **Risk Level:** The employer will not have the financial risk at the end of the plan year, but may or may not receive a credit.
- **Premium Calculation:**
 - The plans use a census of employees to create a cost projection and determine a flat monthly cost for the coverage.

- Includes claims allowance, a fee paid to the TPA or commercial insurer, and stop-loss coverage
- At renewal:
 - If the group has fewer claims than expected, an excess claims allowance may be refunded to the group or used as a credit for the following year's policy. Therefore, the group might have a lower monthly rate for the next year.
 - If the group performs as expected, with claims in line with the estimated amount, their rate for the next year may be similar or have a minimal increase for inflation.
 - However, if the group experiences more claims than estimated, there will be increases — sometimes significant ones — in the premium for the next year. If claims remain high or a group's demographics suggest increased risk for high claims, it may be advantageous for a group to switch back to a fully-insured plan.

Info from: <https://www.blueridgeriskpartners.com/blog/eb-types-of-health-plans>

Team Roster

Tuesday, May 16, 2023 8:43 AM

Total Headcount: 43 (as of 4/18/25 excluding Mgmt & Bethany)

Business & Systems Integration Team

- Charity Schweiger - PT
 - Business Implementation Analyst (1/23/2023)
- Ashley Hirschmann - ET
 - Sr. Systems Implementation Analyst (3/13/2023)
- Taylor Montgomery - MT
 - Business Implementations Team Lead (5/15/2023)
- Jordyn Merchant - ET
 - Business Implementation Analyst (6/5/2023)
- Katie Jones - ET
 - Sr. Systems Implementation Analyst (9/5/2023)
- Noelle Cardiel - ET
 - Associate Implementation Analyst (11/6/2023)
- Beck Berkley - ET
 - Business Implementation Analyst (11/13/2023)
- Casey Wakeford - ET
 - Business Implementation Analyst (4/1/2024)
- Theo Chillis - ET
 - Business Implementation Analyst (8/5/2024)

Team Roster Spreadsheet

[ADS_EB_Sales_Service_Business_Integration.xlsx](#)

Backups

Jordyn	Noelle
Charity	
Ashley	Katie
Taylor	Beck
	Casey

Team Leads

- TBD - **AST1**
- Jason Naville - **AST2**
- Makayla Megalo - **AC Team Lead**

Account Managers

AST1 Name/Hire date

- Antonio Islas - 12/2021
- Maritza Aguilar - 7/2022
- Dorothy Anibarro - 8/2022
- Victoria Pimentel - 9/2022
- Paul Blackwood - 2/2024 - Interim AST1 Team Lead
- Eric Burkhart - 9/2024

AST2 Name/Hire date

- Joshua Lira - 5/2023
- Lynn Bos (From Bell Anderson) - 7/2023
- Renee Ferguson (From GCH) - 7/2023
- Shannon Baptiste (From Echelon) - 7/2023
- Amy Downter - 1/2024
- Karen Nicholson - 1/2024
- Stephanie Kyhl - 1/2024
- Rae Carter - 2/2024 (1SE AM)
- Christy DeRienzis - 2/2024
- Karina Donaldson - 3/2024
- Teena Applegate - 4/15/2024 (AK transfer - 1NW AM)
- Justin Levesque - 4/29/24
- Charlotte Warren - 4/29/24 (1NE AM)
- Meagan Corlew - 5/13/24
- Paula Marsh - 6/2024
- Renee Sandretto - 7/2023 (promoted to AM 6/2024)
- Scott Esparza - 3/2024 (promoted to AM 6/2024 - 1NW AM)
- Jessica Desanti - 7/29/24 (1NE AM)
- Heather Costa - 4/21/25 (1SE AM)

Account Coordinators

- Victoria (Tori) Amezcua - 4/2022
- Nikki Funatsu - 1/2022

Company Information

Name: Acrisure Digital Solutions,
LLC
FEIN: 92-1273756
NPN: 20561239
Address:
955 Yard St.
#225
Grandview Heights, OH 43212

Other

- Christa Tracey - CSR - 7/2023

Managers

- Mike Feldman
 - Program Manager
 - Oversees the Onboarding Team
- Jodie Ladd
 - Chief of Staff, Digital Info
 - Mike's Boss
- Erik Bristow
 - Executive of Development Services
 - Brian's Boss
- Brian Lelio
 - VP of Client Development Services
 - Oversees the AM's, AE's and Service Team
- Bethany Lueb
 - Operations Manager

Regulatory Affairs

Handles our block transfers for us

- Ezekiel Popoola
- Max Elve
- Leeah Grunwell (Team Lead)

EB EPIC Data Team

- Rachel Landry
- Rachel Key
- Jennifer Dibert
- Mike Vollmer
- Emily Olson

Accounting Team

AcctACR@acrisure.com (Send all Acctg. emails to this address)

- Tyler Frye-Financial Report Support
- Josh Smart-Day to Day Operations manager
- Sandra Cordova-DB Reconciliation
- Cathy Dutkiewicz-Producer/Broker Reconciliation and payment

Policy Line Types

Tuesday, September 12, 2023 11:19 AM

[Policy Types Active and Inactive Updated 4-14-25.xlsx](#)

Policy Status Codes

Monday, November 20, 2023 8:45 AM

**Policy Status: Codes, Descriptions, & Explanations**

Code	Description*	Explanation
NEW	New	New Business/Policy
BOR	New – BOR	DO NOT USE!!! Not applicable to Benefits.
REN	Renewal	Renewed policy with same carrier
REW	Renewal – Rewrite	Rewritten policy with new carrier at renewal
NRN	Non-Renewed (New)	Policy did not renew at end of policy period – prior status was <u>NEW</u>
NRR	Non-Renewed (Renewal)	Policy did not renew at end of policy period – prior status was <u>REN</u>
CNW	Cancelled (New)	Policy cancelled – prior status was <u>NEW</u>
CRN	Cancelled (Renewal)	Policy cancelled – prior status was <u>REN</u>
CRW	Cancelled (Rewritten)	DO NOT USE!!! Not applicable to Benefits.
ZER	Created in Error	Used for clean up. For policy that were added in error or were entered incorrectly.
ZIN	Info Only	DO NOT USE!!! Not applicable to Benefits.

* Description = Current Status (Prior Status)

Terminology Definitions

Monday, April 22, 2024 10:35 AM

Term	Definition
Ancillary Products	Anything EB related, outside of Medical coverage . Example: Dental, Vision, Life, Accident, etc.
Book Roll	Moving a book of business from one Agent/Producer/Agency/Broker to another <ul style="list-style-type: none"> • Think of the action of rolling your 401k over from one vendor to the other – all details are transferring hands
Dead on Arrival	This can happen across numerous cases: <ul style="list-style-type: none"> • If the client decides one of the following during the BOR process: <ul style="list-style-type: none"> ◦ Cancels their policy with AP ◦ Decides to stay with AP and not move to Acrisure ◦ BOR their policy to another agency/broker • If the client had an active account but no active policies within the AMS during data migration
Off-Cycle	Partial or smaller file coming from an AP or numerous APs at a time. This will apply when we're not obtaining their full Book of Business.
Platform Block Transfer	Full file coming from a platform to be migrated to Acrisure. Example: South, Northeast, Southwest, etc.
Preferred Carriers	Ancillary carriers that have gone through the ADS RFP process and have agreed to meet certain standards we requested. Link to Folder in OneDrive . <ul style="list-style-type: none"> • ADS AM's are required to quote these carriers for all ancillary projects, and need special permission to write ancillary products elsewhere.