Scheduled Reports

Friday, May 19, 2023   3:43 PM

Renewal Workflow Activity Report - Scheduled by Ashley to run monthly on the 1st

- This report includes a list of <u>policies</u> that expire in the 120 day range.
- Each of the policies on the list had an BRSG activity opened which is coded to the Account Manager as the Who/Owner.
- Copy of the Report will be emailed to Ashley & Katie
- Since the relative date range sometimes caused duplicate dates being caught on the report, you have to enter exact dates for the Policy Exp Date criteria (2nd of the month through 1st of the following month).
  - Open the criteria page for the **Renewal Workflow Activity Report**
  - Click on "Policy Expiration Date"
  - Update the Fixed date range with the new range

  - Add the new month to the list on the right
  - Go to the Deliver Options screen and schedule it for the 1st of the next month for One Time Only Recurrence

Range Tracker for Renewal Workflow Activity Report

1/1/24	3/31/24 - 4/30/24	90
2/1/24	5/1/24 - 5/31/24	90
3/1/24	6/1/24 - 6/29/24	92
4/1/24	6/30/24 - 7/30/24	90
5/1/24	7/31/24 - 8/29/24	91
6/1/24	8/30/24 - 9/29/24	90
7/1/24	9/30/24 - 10/29/24	91
8/1/24	10/30/24 - 11/29/24	90
9/1/24	11/30/24 - 12/30/24	90
10/1/24	12/31/24 - 1/29/25	91
11/1/24	1/30/25 - 3/1/25	90
12/1/24	3/2/25 - 3/31/25	91
1/1/25	4/1/25 - 5/1/25	90
2/1/25	5/2/25 - 6/1/25	90
3/1/25	6/2/25 - 7/1/25	93
4/1/25	7/2/25 - 8/1/25	92
5/1/25	8/2/25 - 9/1/25	N/A

Open BOR Activity Report - Scheduled by Ashley to run every Monday and is emailed to Veronica, Makayla, Jason, & Ashley

- We review the report and report the number of issues on the data quality Monday board
  - Filter out any activities with a PM as the who/owner still
  - Check the follow up/start dates and report any open activity as an error/issue with a date prior to 2 weeks before the date of the report

The 7 SVC Reports listed here: SVC Reports - Scheduled by Katie to be emailed to Katie and Ashley on the 1st of every month to be combined and sent to AAS_EBT

ADS AP Producer List: Scheduled by Ashley to run on the 25th of every month and is emailed to Ashley and Katie. Instructions on what to do with this report are HERE

120 Day Renewal Letter Report - Scheduled by Ashley to run monthly on the 1st ==(THIS REPORT IS TURNED OFF FOR NOW)==
Will email the 120 Day Renewal email to primary contact when a policy shows in the reported range. *Configured to only email 1 letter if there are multiple policies in the range
Copy of the Report will be emailed to Veronica, Makayla, Jason, Brian, Ashley & Katie