

Commercial Lines

Workflows & Procedures

*For*

Acrisure Texas Risk Advisors & Insurance Services, LLC

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Description automatically generated

v02.12.25

# How to Use this Document

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| This document contains valuable information relevant to the usage of EPIC, including **Epic Basics**, day-to-day **Workflows**, and **Job Aids. DO NOT PRINT THIS DOCUMENT.**  For optimal usage:   1. Click the **View** menu at the top in the Microsoft Word toolbar 2. Checkmark **Navigation Pane**      1. The left pane will open and show a listing of topics      1. Click on the topic to jump to that section/page. 2. Hyperlinks within the document will lead to specific pages or Job Aids.      1. Some hyperlinks will connect to a webpage outside of the document. |

# Epic Browser

## Logging in

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

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

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

## Browser Tabs

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

## Connection Suite & New Functionality Popups

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| The Connection Suite is required to ensure full functionality and connection within Epic Browser. Acrisure IT handles all updates in the background for the Connection Suite Plugin. **Ignore these popups.** If you are receiving an error, follow the instructions to [hard shutdown](#_Shutting_Down_Desktop) to ensure there’s a clean connection to all services run on your computer. If you are experiencing functionality issues after shutting down, submit a ticket to [support@acrisure.com](mailto:support@acrisure.com).  ***Reminder: A hard shut down of your computer should be done at the end of each workday.*** |

## Logging out of Epic

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

## Shutting Down Desktop

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

# EPIC BASICS

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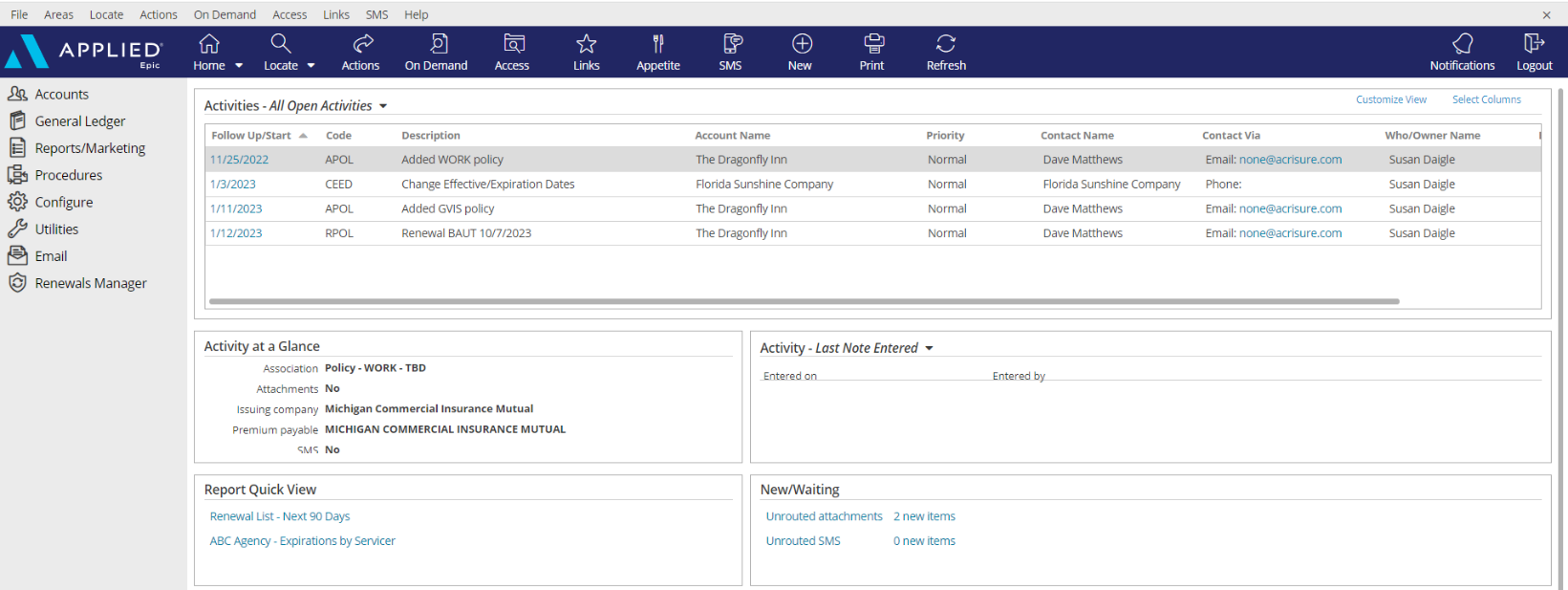
## Epic Icons

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

## Keyboard Shortcuts

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## Home Base



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

## Email

### Microsoft Outlook Integration with Epic

#### Set Outlook Email Integration Default

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

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

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

### Email from Distribution Manager

#### Set up Distribution Manager Email Account

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| 1. From the **Home Base**, click **Configure** from the left Navigation Panel 2. Click **User Options** and select **Distribution Email Accounts** 3. If more than one account is listed, **delete all except Primary Email Account** 4. Highlight Email Account and click the **Edit** pencil 5. Enter the Distribution Email Details as follows    * Associated Agency = **select your Agency from the dropdown list**    * Display Name = enter your full name    * Reply address = enter your email address 6. Click **Finish**   ***NOTE: For those whose legal entity name is being retained (Public Entity, Financial Services, etc.) it is important NOT to use the Acrisure email address; use your legal entity’s email address.*** |

#### Set up Distribution Email Signature

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

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

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

#### Send Email from Distribution Manager

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

## Faxing

### From Distribution Manager

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

## Sticky Notes

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| 1. Add a sticky note by clicking the NEW button in the blue Options Bar within the Client Account   A screenshot of a computer  Description automatically generated   1. Enter note 2. Collapse the note by clicking the double up arrows 3. Manage the Sticky Note by clicking the three vertical dots   A screenshot of a computer  Description automatically generated   1. Delete the Sticky Note by clicking the X 2. Add a New Sticky Note by clicking the + |

## Client Accounts

### Account Sources – REQUIRED FIELD

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| |  | | --- | | 0. Cross Sell-Platform | | 1. AM/AE Solicited | | 1. Producer Solicited | | 2. Referral - Acrisure Cyber Services | | 2. Referral - Acrisure Global Network | | 2. Referral - Acrisure Title Partner | | 2. Referral - Association | | 2. Referral - Broker - Acrisure | | 2. Referral - Broker - Non-Acrisure | | 2. Referral - Client | | 2. Referral - Employee | | 2. Referral - Evolution Advisors | | 2. Referral - FBC Mortgage | | 2. Referral - Financial Partner/WM | | 2. Referral - GA | | 2. Referral - Loan Officer | | 2. Referral - Mariner Wealth | | 2. Referral - Other | | 2. Referral - Payroll Firm | | 2. Referral - Realtor | | 2. Referral - TPA | | 3. Marketing - Acrisure.com | | 3. Marketing - Internet Search | | 3. Marketing - Other | | 3. Marketing - Social Media | | 3. Marketing - Telemarketing | | 4. Other/Unknown | | 5. Win Back | | 6. Call In/Walk In | | Z. AMS Conversion - Unknown | | Z. Update Needed | | **Account Source is a Required Field.**  **Be sure to select the appropriate one for tracking and reporting purposes.**  If the policy source is unknown, select “**Update Needed**” so it can be updated later. |

### Servicing Roles

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

### Locate Account

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

### Close Out of an Account Record

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| Locating and selecting an account will create a new tab in the browser. **Close the account record by clicking the X above the Logout button,** NOT by clicking the x within the tab at the top. |

## Contacts

### Contacts Overview

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

### Add Additional Contacts

#### Contacts – EPIC Data Standards

|  |  |
| --- | --- |
| **Types of Contacts**   |  | | --- | | * + - * **Main Business Contact (MBC)**   **Key Fields**   * + - * **FEIN**       * **NAICS**       * **Business Type**       * **Primary Contact** (Individual Contact)       * **Additional Contact** (DBA, Named Insureds, Mailing or Billing Address) | |

#### Add Individual Contact

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| 1. From the client’s account, click **Contacts** in the left panel 2. Click the **ADD** button      1. Select the **Individual** radio button 2. Enter First Name, Last Name 3. **Category:** Indicate whether contact only, policy only, or both contact & policy 4. **Description:** Select the appropriate description for this contact 5. Enter the address. If the account address is the same as the contact address, check the box for Use Account Address 6. Enter phone number (indicate if mobile) and email address ***NOTE: Email is a required field***. If the contact does not have an email address, enter [none@acrisure.com](mailto:none@none.com)      1. Click **DETAIL** to add preferences and personal contact information.   Click **Save Contact**. |

#### Add Business Contact

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| 1. From the client’s account, click **Contacts** in the left panel 2. Click the **ADD** button      1. Select the **Business** radio button 2. Enter Business name 3. **Category:** Indicate whether contact only, policy only, or both contact & policy 4. **Description:** Select the appropriate description for this contact 5. Enter the address. If the account address is the same as the contact address, check the box for Use Account Address 6. Enter phone number (indicate if mobile) and email address.   ***NOTE:*** If the contact does not have an email address, enter [none@acrisure.com](mailto:none@none.com)   1. Click **Detail** 2. **Edit** Contact 3. Enter required **NAICS**; click **Save Contact Summary** 4. Update Preferences and Business tabs: = Business details, Identification numbers = FEIN, SSN, etc and Company revenue, payroll, payroll cycle, etc. |

#### Updating Main Business Contact (MBC)

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| 1. Double click on MBC  2. Verity your **NAICS** code is listed under the Contact Summary  A close-up of a white screen  Description automatically generated  3. Select the **Business** tabs  4. Add the **FEIN** Number under Identification Numbers and select the **Business Type** under Business Details  A screenshot of a computer  Description automatically generated |

#### Add Additional Addresses (Mailing or Billing)

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| 1. From the client’s account, click **Contacts** in the left panel 2. Click the **ADD** button   A screenshot of a computer  Description automatically generated   1. Select the **Business** radio button 2. Enter **Main Business** name 3. **Category:** Indicate whether contact only, policy only, or both contact & policy 4. **Description:** An L- description can be selected to indicate the type of address A screenshot of a computer     Description automatically generated 5. Enter the **Address**. Attn: or C/O should be added to Address line 2 as needed 6. An **Address Description** can be added to indicate the type of address 7. Enter phone number (indicate if mobile) and email address.   ***NOTE:*** If the contact does not have an email address, enter [none@acrisure.com](mailto:none@none.com)   1. Click **Detail** 2. **Edit** Contact      1. Enter required **NAICS**; click **Save Contact Summary** 2. Update Preferences and Business tabs: = Business details, Identification numbers = FEIN, SSN, etc and Company revenue, payroll, payroll cycle, etc. |

## Activities

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| Activities in Epic perform three essential functions:   * Add a record to the client file for the action performed * Allow a follow up or Open Activity as a reminder to do something at a current or future date * Permanently document the file with the use of Notes within Activities |

### Home Base Open Activities

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

### Activity Categories

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| |  | | --- | | **Description** | | $AccountingEvents (Reporting Only) | | $Broker Commission Payables | | $Cash Application | | $Direct Bill | | $Invoicing | | $Premium Payables | | $Producer Commission Payables | | $Receivables | | Accounting Only | | Bonds | | Claims | | Commercial | | Employee Benefits | | Financial Services | | Medicare | | Personal Lines | | Risk Management Services | | TPA | | xDownloads | | xeDocs | |

### Activity Workgroups

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
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| |  |  | | --- | --- | | **Code** | **Description** | | @APPAY | Applied Pay Default Work Group | | @EXT | External Default Group | | @LEADS | Leads Inbox Default Work Group | | ACCT | Accounting | | APAY | Accounting - Payables | | ARVW | Accounting Review | | CIDT | ACRISURE Centralized Interface Download Team | | DBSC | Direct Bill Service Center | | INVO | Invoicing | | PLWG | David Nix – Personal Lines | | RSP – CN | RSP - CN | | RSP-IN | RSP – IN | | RSP-PI | RSP – CN Policy Insights | | SA | Systems Analyst | |  |  | |

### Activity Access Levels

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| |  | | --- | | **Description** | | Accounting | | Claims | | Client Financials | | Commercial Lines | | HIPAA | | HR Consulting | | Surety Financials | |

### System Generated Activity Codes

|  |  |  |
| --- | --- | --- |
| **Code** | **Description** | **Event** |
| **@APY** | Applied Pay payment received from &ContactName& | Payment from Client |
| **ACLM** | # Added claim for DOL &DateLoss& | Add Claim |
| **ADD1** | # Add Insured &AcctName& | Add Account |
| **ADD2** | # Add Prospect &AcctName& | Add Account |
| **ADDC** | # Address Applied to Other Items | Address Applied to Other Items |
| **ADSC** | # Add Service | Add Service |
| **AMMK** | # Added master marketing submission for &AcctName& | New Marketing Submission |
| **AOP** | # Add Opportunity | Add Opportunity |
| **APAY** | Applied Pay payment received from &ContactName& | Payment from Client |
| **APOL** | # Added &PolType& policy effective &PolEffDate& | Add Policy |
| **AUID** | # Issued auto ID card | Issue Auto ID Card |
| **BIND** | # Issued binder &PolDesc& &PolEffDate &Policy#& | Issue Binder |
| **BND1** | # Bind &PolDesc& via Master Marketing | Move Marketed Lines to Current Policies |
| **BORP** | # Agent/Broker of Record - P&C | Add Policy |
| **CEED** | # Change Effective/EXpiration Dates | Change Effective/Expiration Dates |
| **CERT** | # Issued Certificate ( &OintNm& ) | Issue Certificate |
| **CHGA** | # Audit &ServSumEffDate& &ServSumDesc& | Endorse/Revise-Existing Lines |
| **CHGE** | # Change &ServSumEffDate& &ServSumDesc& | Endorse/Revise-Existing Lines |
| **CHGI** | # Internal Correction &ServSumEffDate& &ServSumDesc& | Endorse/Revise-Existing Lines |
| **CHGL** | # &ServSumEffDate& &ServSumDesc& | Endorse/Revise-Add Line Midterm |
| **CPOL** | # Canceled - Lost Policy Eff: &ServSumEffDate& &ServSumDesc& | Cancel Policy/Line |
| **CREW** | # Canceled - Rewritten Policy Eff: &ServSumEffDate& &ServSumDesc& | Cancel Policy/Line |
| **CS24** | # Client Portal Account Created | Client Portal Account Created |
| **EVID** | # Issued Evidence of Insurance &PolDesc& &PolEffDate& | Issue Evidence of Insurance |
| **I-CS** | # Indio Carrier Submission Added | Indio Carrier Submission Added |
| **LOS1** | # Lost Opportunity: &AcctName& | Close Opportunity |
| **PMT1** | # Receipt for Payment | Generate Receipt for Payment |
| **PMT2** | # Receipt for Payment - SWEEP | Generate Receipt for Payment |
| **PROP** | # Proposal Generated | Proposal |
| **RCER** | # Renewed COI | Renew Certificate of Insurance |
| **REIN** | # Reinstated policy/line | Reinstate Policy/Line |
| **RESC** | # Renew Service | Renew Service |
| **REVI** | # Renewed EOP | Renew Evidence of Insurance |
| **RPOL** | # Renewal &PolType& &PolEffDate& | Renew Policy |
| **SCAS** | # Submitted to Carrier &PPEName& for quote on &PolDesc& | Submit to Carriers |
| **SMR** | # SMS Routed | SMS Routed |
| **SMS** | # SMS Sent | SMS Sent |
| **SUMM** | # Summary Generated | Proposal |
| **WON1** | Won P&C Opportunity: &AcctName& | Close Opportunity |
| **WON2** | Won EB Opportunity: &AcctName& | Close Opportunity |
| **WON3** | Won Surety Opportunity: &AcctName& | Close Opportunity |
| **WON4** | Won RMS Opportunity: &AcctName& | Close Opportunity |
| **WON5** | Won Flood Consulting Opportunity | Close Opportunity |
| **WON6** | Won Flood Insurance Opportunity | Close Opportunity |
| **WON7** | Won Referral Opportunity | Close Opportunity |
| **WON8** | Won IND Opportunity: &AcctName& | Close Opportunity |
| **WON9** | Won FIN Opportunity: &AcctName& | Close Opportunity |

### Manual Activity Codes (F9)

#### For Accounting Workflow Activities – See [SharePoint](https://acrisure.sharepoint.com/:w:/s/ACR-ABSAccountingTeam/ESAdZgcBwPdJt0_n5-hNILkBueeqZpQWrGK6rg54rr9l7g?e=Vg3PwS) for Platform Activity Guide

#### Commercial Lines Manual Activities

|  |  |
| --- | --- |
| **Code** | **Description** |
| **CARV** | CL - Account Review |
| **CAU1** | Audit &PolType& effective &PolEffDate& |
| **CAU2** | Audit - Monthly/Quarterly Reporting Due |
| **CBCH** | CL - Benchmarking |
| **CBIQ** | CL - Billing Inquiry |
| **CCOI** | COI Request |
| **CCRF** | CL - Refer Claim to Claims Team |
| **CCRV** | Claim Review |
| **CCTR** | Contract Review |
| **CDIV** | Dividend |
| **CEOP** | EOP Request |
| **CEXP** | Experience Reporting |
| **CLCR** | Loss Control Recommendation |
| **CLRR** | CL- Renewal Review &PolExpDate& &PolDesc& |
| **CMVR** | MVR Request |
| **COLG** | New CL Client Onboarding - Large |
| **COSM** | New CL Client Onboarding - Small |
| **CPCK** | Policy Checking |
| **CQUE** | CL - Coverage Inquiry |
| **CREG** | Regulatory Notice |
| **CRMK** | Remarket Existing Line |
| **CRSK** | CL - Account At Risk |
| **CRUN** | Loss Runs |
| **CSLF** | CL - Surplus Lines Tax Documents |
| **CSTW** | Stewardship Report |
| **CUND** | Underwriting |
| **CWAU** | Auto Reduction in Reserves |
| **CWGL** | GL Reduction in Reserves |
| **CWOT** | Other Reduction in Reserves |
| **CWPR** | Property Reduction in Reserves |
| **CWRD** | Claim Win Reversed Declination |
| **CWWC** | Work Comp Reduction in Reserves |
| **GACR** | Acrisure Real Estate Services Referral |
| **GACS** | Acrisure Cyber Services Referral |
| **GAPT** | Appointment with &AcctName& |
| **GCAL** | Call from &AcctName& |
| **GCHG** | CSR24 Policy Change Request |
| **GCIN** | General Client Information |
| **GCLM** | CSR24 Claim |
| **GCN1** | Carrier Notice of Cancellation |
| **GCN2** | Carrier Notice of Cancellation for Non-Payment |
| **GCOI** | CSR24 Cert Issuance |
| **GCRQ** | Certificate Request |
| **GCSA** | Cross Sell Agreement |
| **GDRV** | Driver Request |
| **GNRN** | Policy Not Renewed |
| **GPOR** | CSR24 Client Self Setup on Portal |
| **GQUE** | Question/Note |
| **GSUP** | Support Team Updates |
| **GXFL** | EX-date follow-up for &AcctName& |
| **QCYB** | Quote - Cyber |
| **QNEW** | Quote - New Business |
| **QREW** | Quote - Renewal/Rewrite |

## Attachments

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

|  |
| --- |
| **Drag & Drop from Outlook, network folder, desktop, etc.**   * **Attach to**: Any final policy documents (new policy, renewal policy, endorsement dec pages, etc.) and any emails, or other “busy work” documents should be attached to the corresponding **Activity**   + **Mark as an Important Policy Document** if it is a Final Policy Document * Use this feature to quickly find important documents such as policy dec pages, audits, endorsements, or other important documents.   ***NOTE: the Access button can also be used to filter attachments. Example: Highlight policy, Access/Attachments then only the attachments associated with the highlighted policy will be seen.***  **Select appropriate folder to utilized client portal (CSR24)**  **Select the appropriate access level for security**  **Check the Client Accessible box to make an attachment available in the client portal (CSR24**)  **Remove description and update using Platform** [**Naming Convention**](#_Attachment_Naming_Conventions) |

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

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

### Making Attachments Client Accessible – CSR24 Client Portal

|  |  |
| --- | --- |
| 1. LOCATE Client 2. Click Attachments from the left navigation panel 3. Right click on the attachment your client should have access to, and select **Edit Attachment Detail**   A screenshot of a computer  Description automatically generated   1. In the Attachment Details window:    * Update the description as needed    * Select the appropriate folder    * Check the **Client Accessible** box    * Click FINISH   A screenshot of a computer  Description automatically generated   |  | | --- | | See [CSR24 Workflows](https://acrisure.sharepoint.com/sites/AcriWorld/Shared%20Documents/Forms/AllItems.aspx?FolderCTID=0x01200008AF4B3768355743A4CA96C4C3214460&id=%2Fsites%2FAcriWorld%2FShared%20Documents%2FEnterprise%5FSolutions%5FCenter%2FPlatforms%2FSouth%2FEpic%2C%20CSR24%2C%20%26%20Indio%20Resources%2FCSR24%20Workflows&viewid=f6de5ddd%2Dd0d1%2D4fcf%2Daf55%2D3160191957d5) for additional CSR24 Information | |

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

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

### AI Email Summarization

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

### Attachment Naming Conventions

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

### Attachment Access Levels

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Access levels allow restriction of access to attachments by granting security rights to certain groups. The default Access Level = Public.   |  |  | | --- | --- | | **Access Level** | **Description** | | 1 | HIPAA | | 2 | Accounting | | 3 | Financial Services | | 4 | Surety Financials | | 5 | HR Consulting | | 6 | Claims | | 7 | W9 | |

### Attachment Actions

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

**\*\*PLEASE FOLLOW THE** [ATTACHMENT NAMING CONVENTION](#_Attachment_Naming_Conventions) **PROTOCOL.**

### Finding and Viewing Attachments/Documents

|  |
| --- |
| * **Important Policy Documents:** In the attachments list view, click the link “Show Only Important Policy Documents” to view all documents being previously marked as “Important”   To revert to all documents, click “Show All Documents.” This link serves as a filtering tool.     * **Filters:** Choose a filter: Ex. Attached within last 6 months.     Filtering by multiple Types of Business is also an option and can be set as the filter default |

### Folder Structure

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| |  |  |  | | --- | --- | --- | | Property & Casualty | Applications |  | | Audits |  | | Auto IDs |  | | Bind Requests |  | | Binders |  | | Cancellations |  | | Certificates |  | | Claims | Claim Correspondence | | Claim Invoices | | Claim Payments | | Estimates | | Loss Notice | | Loss Runs | | Photos | | Contracts & Agreements |  | | Correspondence |  | | Endorsement |  | | Evidences of Insurance |  | | Financials |  | | Inspection Reports/Loss Control |  | | Loss Runs |  | | Marketing |  | | MRV’s |  | | Policies | All Other Policies | | Auto | | Liability | | Property | | Workers Compensation | | Policy Checking |  | | Proposal |  | | Quotes |  | | Renewal |  | | Reports |  | | Schedules |  | |

### Folder View

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

### Form Letter Templates

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

### Access Filter

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

## Policy Basics

### Policy Sources – REQUIRED FIELD

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| |  | | --- | | 0. Cross Sell-Platform | | 1. AM/AE Solicited | | 1. Producer Solicited | | 2. Referral - Acrisure Cyber Services | | 2. Referral - Acrisure Global Network | | 2. Referral - Acrisure Title Partner | | 2. Referral - Association | | 2. Referral - Broker - Acrisure | | 2. Referral - Broker - Non-Acrisure | | 2. Referral - Client | | 2. Referral - Employee | | 2. Referral - Evolution Advisors | | 2. Referral - FBC Mortgage | | 2. Referral - Financial Partner/WM | | 2. Referral - GA | | 2. Referral - Loan Officer | | 2. Referral - Mariner Wealth | | 2. Referral - Other | | 2. Referral - Payroll Firm | | 2. Referral - Realtor | | 2. Referral - TPA | | 3. Marketing - Acrisure.com | | 3. Marketing - Internet Search | | 3. Marketing - Other | | 3. Marketing - Social Media | | 3. Marketing - Telemarketing | | 4. Other/Unknown | | 5. Win Back | | 6. Call In/Walk In | | Z. AMS Conversion - Unknown | | Z. Update Needed | | **Account Source is a Required Field.**  **Be sure to select the appropriate one for tracking and reporting purposes.**  If the policy source is unknown, select “**Update Needed**” so it can be updated later. |

### Policy Types

|  |  |  |
| --- | --- | --- |
| **Code** | **Description** | **Application Detail** |
| **ALIA** | Agriculture Liability | Agri-Business Liability |
| **APK1** | Agriculture Package-AG | < None > |
| **APK2** | Agriculture Package-CL | < None > |
| **APP** | Agriculture Personal Property | Agri-Business Schedule and Unscheduled Personal Property |
| **APRO** | Agriculture Property | Agri-Business Property Section |
| **AV01** | Aircraft - Agriculture | < None > |
| **AVGL** | Aviation General Liability | <None> |
| **BCM1** | BOND Commercial (NR) | Surety Report Detail |
| **BCM2** | BOND Commercial (Recurring) | Surety Report Detail |
| **BCON** | BOND Contract (NR) | Surety Report Detail |
| **BCWA** | BOND Contract Warranty (NR) | Surety Report Detail |
| **BFI1** | BOND Fidelity / ERISA - Surety | Surety Report Detail |
| **BFI2** | BOND Fidelity / ERISA - CL | Surety Report Detail |
| **BLIC** | BOND License & Permit | < None > |
| **BMAI** | BOND Maintenance | Surety Report Detail |
| **BMSC** | BOND Miscellaneous | Surety Report Detail |
| **BNOT** | BOND Notary | Surety Report Detail |
| **BPER** | BOND Performance & Payment | Surety Report Detail |
| **BPOF** | BOND Public Official | Surety Report Detail |
| **BROF** | BOND Roofing (NR) | Surety Report Detail |
| **BROL** | BOND Release of Lien | Surety Report Detail |
| **BSUB** | BOND Subdivision | Surety Report Detail |
| **BTIT** | BOND Title | Surety Report Detail |
| **BUNI** | BOND Union | Surety Report Detail |
| **CACA** | Active Assailant | < None > |
| **CACH** | Commercial Accident & Health | < None > |
| **CADD** | Commercial AD&D | CF AD&D / Travel Accident |
| **CANI** | Animal Mortality | < None > |
| **CARA** | COM Roadside Assistance | Business Auto Detail |
| **CAU1** | Business Auto | Business Auto Detail |
| **CAU2** | Business Auto - Excess | Business Auto Detail |
| **CAU3** | Commercial Recreational Vehicle | Business Auto Detail |
| **CAU4** | Business Auto - Physical Damage | < None > |
| **CAV0** | Aircraft | < None > |
| **CAV1** | Commercial Aviation Drones | < None > |
| **CBAI** | Bailee | Property Detail |
| **CBM** | Boiler & Machinery | Boiler & Machinery Detail |
| **CBOP** | Business Owners Policy | Business Owners Detail |
| **CBR** | Builders Risk | Installation/Builders Risk Detail |
| **CCL1** | Cyber Liability | CF Cyber Privacy & Data Breach Insurance Info |
| **CCL2** | Cyber Liability (GL) | General Liability Detail - Simplified |
| **CCOW** | Control of Well | CF Operators Extra Expense |
| **CCRM** | Crime | Crime Detail |
| **CCRP** | Crop & Hail | < None > |
| **CDIC** | Difference In Conditions | CF Difference In Conditions |
| **CDO1** | Directors & Officers | CF Directors & Officers |
| **CDO2** | Directors & Officers - Excess | CF Directors & Officers |
| **CE01** | E&O | CF Errors & Omissions |
| **CE02** | E&O - Accountants | CF Errors & Omissions |
| **CE03** | E&O - Architects & Engineers | CF Errors & Omissions |
| **CE04** | E&O - Bankers | CF Errors & Omissions |
| **CE05** | E&O - Contractors | CF Errors & Omissions |
| **CE06** | E&O - Lawyers | CF Errors & Omissions |
| **CE07** | E&O - Med Mal | CF Errors & Omissions |
| **CE08** | E&O - Miscellaneous | CF Errors & Omissions |
| **CE09** | E&O - Public Officials | CF Errors & Omissions |
| **CE10** | E&O - Pension Trustee | CF Errors & Omissions |
| **CE11** | E&O - Excess | CF Errors & Omissions |
| **CE12** | E&O - Aviation | CF Errors & Omissions |
| **CEBL** | Employee Benefits Liability | < None > |
| **CEDP** | Electronic Data Processing | Electronic Data Processing Detail |
| **CEF1** | Equipment Floater | Equipment Floater Detail |
| **CEF2** | Commercial Fine Arts | Equipment Floater Detail |
| **CEF3** | Jewelers Block | Equipment Floater Detail |
| **CEP1** | Employment Practices Liability | CF Employment Practices Liability |
| **CEP3** | Employment Practices Liability - Excess | < None > |
| **CEQ** | Commercial Earthquake | Property Detail |
| **CEQU** | Equine | CF Animal Mortality |
| **CERP** | Extended Reporting Period | General Liability Detail - Simplified |
| **CFGL** | Foreign General Liability | CF Foreign Liability |
| **CFL** | Fiduciary Liability | CF Fiduciary Liability |
| **CFL0** | Fiduciary Liability - Excess | CF Fiduciary Liability |
| **CFL1** | Commercial Flood (NFIP) | Flood Insurance Preferred Risk Policy Application |
| **CFL2** | Commercial Flood (Private) | Flood Insurance Preferred Risk Policy Application |
| **CFL3** | Commercial Flood - Excess | Flood Insurance Preferred Risk Policy Application |
| **CGD** | Garage & Dealers | Garage and Dealers Detail |
| **CGL1** | General Liability | General Liability Detail - Simplified |
| **CGL2** | General Liability - Excess | Umbrella Detail |
| **CGL3** | General Liability - Project Specific | General Liability Detail - Simplified |
| **CGL4** | General Liability - OCIP / Wrap | General Liability Detail - Simplified |
| **CGL5** | GL – OCP – Owners Contractor Protective (NR) | General Liability Detail - Simplified |
| **CGS** | Glass & Sign | Glass and Sign Detail |
| **CGSD** | Group State Mandated Disability (CL) | < None > |
| **CHUL** | Hull & Machinery | < None > |
| **CID** | Commercial Identify Theft | < None > |
| **CKR** | Kidnap & Ransom | CF Kidnap & Ransom |
| **CLD** | Legal Defense | < None > |
| **CLL** | Liquor Liability | CF Liquor Liability |
| **CMOL** | Marina Operators Liability | CF Marina Operators Liability |
| **CMTC** | Motor Truck Cargo | Motor Truck Cargo |
| **CNL** | Nuclear Liability | General Liability Detail - Simplified |
| **COA** | Occupational Accident | CF Occupational Accident |
| **COCE** | Ocean Marine Cargo | < None > |
| **COI1** | Owners Interest | General Liability Detail - Simplified |
| **COMC** | Ocean Cargo | < None > |
| **CP1** | Property | Property Detail |
| **CP2** | Property - Excess | Property Detail |
| **CPCF** | Bank Card Program | CF Bank Card Protector Policy |
| **CPI** | Protection & Indemnity | General Liability Detail - Simplified |
| **CPK1** | Commercial Package | < None > |
| **CPK2** | Executive Package | < None > |
| **CPK3** | Foreign Package | < None > |
| **CPK4** | Commercial Farm Package | < None > |
| **CPK5** | Public Entity Package | < None > |
| **CPK6** | Energy Package | < None > |
| **CPK8** | Marine Package | < None > |
| **CPLI** | Products Liability | General Liability Detail - Simplified |
| **CPLL** | Public Law Liability | General Liability Detail - Simplified |
| **CPO1** | Pollution | CF Pollution |
| **CPO2** | Underground Storage Tank | < None > |
| **CPO3** | Above Ground Storage Tank | < None > |
| **CPO4** | Pollution - Contractors | < None > |
| **CPRE** | Product Recall | < None > |
| **CRP** | Railroad Protective | General Liability Detail - Simplified |
| **CRW** | Reps & Warranties | < None > |
| **CSA** | Student Accident | < None > |
| **CSAM** | Sexual Abuse and Molestation Liability | General Liability Detail - Simplified |
| **CSD** | Subcontractor Default | < None > |
| **CSE1** | Special Event | General Liability Detail - Simplified |
| **CSE2** | Hole-In-One | General Liability Detail - Simplified |
| **CST** | Stock Throughput | < None > |
| **CTA** | Travel Accident | CF AD&D / Travel Accident |
| **CTC** | Trade Credit | CF TRG 01 Trade Credit |
| **CTD** | Tenant Discrimination | < None > |
| **CTER** | Terrorism | Property Detail |
| **CTR1** | Truckers | Truckers/Motor Carriers Detail |
| **CTR2** | Truckers (Business Auto) | Business Auto Detail |
| **CTR3** | Truckers Auto Liability | Truckers/Motor Carriers Detail |
| **CTR4** | Truckers Contingent Auto Liability | Truckers/Motor Carriers Detail |
| **CTR5** | Truckers Contingent Cargo Liability | Motor Truck Cargo |
| **CTR6** | Truckers Physical Damage | Truckers/Motor Carriers Detail |
| **CTR7** | Truckers Package | < None > |
| **CTRA** | Transportation | Transportation Detail |
| **CTRB** | Bobtail | Truckers/Motor Carriers Detail |
| **CUMB** | Commercial Umbrella | Umbrella Detail |
| **CVOL** | Volunteers Participants Liability | General Liability Detail - Simplified |
| **CVP** | Valuable Papers / Accounts Receivables | Accounts Receivable/Valuable Papers Detail |
| **CWAT** | Commercial Watercraft | < None > |
| **CWC1** | Workers Compensation | Workers Compensation |
| **CWC2** | Workers Comp Assigned Risk | Workers Compensation |
| **CWC3** | Workers Compensation - Excess | Workers Compensation |
| **CWE1** | Employers Liability - Monopolistic States | Workers Compensation |
| **CWE3** | Employers Liability - Maritime | Workers Compensation |
| **CWI1** | Commercial Wind / Hail | Property Detail |
| **CWI2** | Commercial Wind - Excess | Property Detail |
| **CWI3** | Commercial Wind Deductible Buy Back | Property Detail |
| **CWLL** | Warehouse Legal Liability | < None > |
| **CWV** | Workplace Violence | < None > |
| **CXLI** | Excess Liability | Umbrella Detail |
| **R401** | 401k | < None > |
| **RACS** | Acrisure Cyber Services Referral | < None > |
| **RPA2** | Payroll Referral | < None > |
| **RPEO** | PEO | < None > |
| **RPRP** | Portable Retirement Plan Referral | < None > |
| **RSLO** | SMB Loan Referral | < None > |
| **RSUB** | Subscription/Membership | < None > |
| **RTIT** | Acrisure Title Referral (NR) | < None > |

### Policy Statuses

|  |  |  |
| --- | --- | --- |
| **Code** | **Description** | **When Used** |
| **NBR** | New - BOR | New policy acquired via BOR |
| **NEW** | New | Net-new policy |
| **NX1** | New – Cross Sell – Under 10K | New policy cross sold within the Platform if Total Annual Account revenue is under $10,000 |
| **NX2** | New – Cross Sell – Over 10K | Renewal of a cross sold policy if Total Annual Account revenue is under $10,000 |
| **REN** | Renewal | Renewed policy with same carrier |
| **REW** | Renewal – Rewrite (First renewal w/new carrier) | Policy rewritten with another carrier on renewal |
| **RX1** | Renewal – Cross Sell – Under 10K | Renewal of a cross sold policy if Total Annual Account revenue is under $10,000 |
| **RX2** | Renewal – Cross Sell – Over 10K | New policy cross sold within the Platform if Total Annual Account revenue exceeds $10,000 |
| **CNW** | Cancelled (New) | Cancelled policy when original policy status was NEW |
| **CRN** | Cancelled (Renewal) | Cancelled policy when original policy status was REN |
| **CRW** | Cancelled – Rewritten (Flat or Mid-Term Rewrite) | Cancelled from original carrier and rewritten with another carrier |
| **X-N** | Not Renewed (New) | Policy went to term but did not renew – original status = NEW |
| **X-R** | Not Renewed (Renewal) | Policy went to term but did not renew – original status = REN |
| **ZER** | Created In Error | Use when deprecating policy for conversion cleanup, etc. |
| **ZIN** | Info Only | Use for Info Only policies which are not active with any carrier |

Issuing Company / Premium Payable

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

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

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

### Select the Correct Issuing Company (ICO)

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

### Select the Correct Broker Payable Contract

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

### Service Summary Row and Stages

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

### Change Policy Dates

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| --- |
| 1. Select Policy 2. **ACTIONS** > Change Effective/Expiration Dates 3. Enter new dates (Note: Service Summary Row Dates may need to be updated as well)      1. Activity **CEED** - Change to Closed if no follow-up needed |

### Copy Policy

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

### Print Application

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

### ACORD Application Prefills

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

### Multi-Year Policies

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

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

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

# Platform Epic Structure

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **AGENCIES** | | | | |
| 1SO | Acrisure Texas Risk Advisors & Insurance Services, LLC | | | |
| AAN | Acrisure Texas Division of Associate Agents Network, LLC | | | |
| CPP | Acrisure Card Protection Program Insurance Agency, LLC | | | |
| **BRANCHES** | | | | |
| 1SO | Acrisure Texas Risk Advisors & Insurance Services, LLC | LA1 | | Louisiana |
| AAN | Associate Agents Network | LAR | | Laris Insurance Agency |
| ACI | American Casualty Insurance Agency | LIN | | Lezam Insurance |
| AR1 | Arkansas | OK1 | | Oklahoma |
| BBE | Business Benefit Consultants | MBA | | Mark Boles Insurance Agency |
| BIA | Born Insurance Agency | NV2 | | Nevada (South) |
| BIN | BIG Insurance Solutions | PC2 | | PCS Marketing Services |
| BOX | Box Book of Business | PCS | | PCS Insurance Services |
| BWI | BW Insurance Group | PIA | | Pantusa |
| CIP | Consolidated Insurance Partners | RHA | | Rick Hernandez Agency |
| CPP | Acrisure Card Protection Program Insurance Agency, LLC | SIN | | Slater Insurance Agency |
| DNA | The David Nix Agency | THG | | The Hester Group |
| FSD | Frank Siddons | TMB | | Tailor Made Benefits |
| GBM | Grizzaffi Benefit Management | TOU | | Toubin Insurance Agency |
| HCS | Health Care Solutions | TWI | | The Walls Insurance Agency |
| IOT | Insurance Solutions of Texas |  | |  |
| **DEPARTMENTS** | | | | |
| BND | Bonds | | All Policy Types = BO | |
| CLL | Commercial - Large (50K+ Revenue) | |  | |
| CLM | Commercial - Middle (5K-50K Revenue) | |  | |
| CLS | Commercial - Small (<5K Revenue) | |  | |
| REF | Non-Insurance Referrals | | Non-Insurance Products - PEO, ACS, Title Referrals | |
| **PROFIT CENTERS** | | | | |
| AGR | Agriculture | |  | |
| BND | Bonds | | Bonds Dept Only | |
| COM | Commercial | |  | |
| CPG | Construction | |  | |
| ENG | Energy | |  | |
| MRN | Marine | |  | |
| MSB | Main Street | | Used in Commercial Small | |
| PUB | Public Entity | |  | |
| REF | Non-Insurance Referrals | | Non-insurance related revenue (ACS referrals, PEO brokering, Payroll Services referrals, etc.) | |
| TRA | Transportation | |  | |
| XSC | Acrisure Service Center (HO Use Only) | |  | |

***\*Specific state branch OK1, LA1, AR1, NV2, 1SO are based on the primary producer’s resident license state.***

**WORKFLOWS**

A picture containing symbol, font, line, screenshot

Description automatically generated

## New Business Workflow

|  |
| --- |
| **New Business for Large and Middle Commercial should be sent to the South Platform New Business Placement Team at** [southcentralizedmarketingteam@acrisure.com](mailto:southcentralizedmarketingteam@acrisure.com)  **Best Practice:**   * Before adding a New Client, make sure to search for the client through **Locate** to prevent from creating a duplication account…..**NO DUPLICATE ACCOUNTS** * All **Prospects** should be added into EPIC as soon as Prospect is received |

### Business Account – EPIC Data Standards

|  |  |  |
| --- | --- | --- |
| **Key Fields**   |  |  | | --- | --- | | * **Account Type** * **Account Name** * **Account Address** | * **Account Source** * **Account Servicing Roles** * **Number of Employees** | |

### Add New Client (Prospect) Account

|  |  |
| --- | --- |
| 1. Click **LOCATE** 2. Click the **Add** button (+) 3. **Add Account**    1. Select the **Business** radio button    2. Type of Business = **Commercial** (Multiple types of business can be selected)      1. **Account Information**    1. **Account Name –** Enter legal name of the business entity    2. **Client Type** – Prospect or Insured    3. **Account Source** – Select from the dropdown list to reflect how client was generated    4. **Structure** – Select Agency & Branch from dropdown lists      1. **Business Contact Information**    1. **Address** – Enter valid **primary physical** address (will be verified and auto filled when selected).    2. A popup will appear if there are possible address duplicates found    3. Enter address description, if needed (i.e., Business)      |  | | --- | | See [Additional Addresses](#_Add_Additional_Addresses) under Contacts for mailing and/or billing addresses |  1. **Business Phone**    1. Enter Type (i.e., Business, Mobile, Residence, etc.)    2. Enter Number (must include all 10 digits)    3. Permission – select from dropdown    4. **SMS** = check to enable this number for SMS Text Messaging    5. Click Yes to enable conversational SMS for this number      * 1. Click **+Phone** to add additional phone numbers      1. **Email/Website**    1. Enter Account Email & Website 2. **Identification Numbers**    1. Enter **NAICS** 6-digit number (required) and SIC, if desired      1. **Primary Contact Information**    1. Enter **primary contact** name and date of birth (the person most often spoken with on behalf of this client)    2. Enter **primary contact phone** and enable SMS if the contact agrees to send and receive text messages from the Agency    3. Click **+Phone** to add additional phone numbers      1. Enter **Primary Contact Email** and **contact preferences**      1. **Agency Information**    1. **Agency Defined Categories** – predetermined by the agency; used to tag an account for a specific reporting purpose (i.e., to mark as a VIP account)    2. **Relationships** – add related accounts (i.e., account subsidiaries)      1. Click **Save Account**      1. **Activity**: **ADD2** (add Prospect) or **ADD1** (Insured)    1. Defaults closed    2. Add **Notes** (how account was acquired, what has been done for this account thus far, etc.)    3. Click **Finish** 2. **Account Details**    1. Click the **Servicing Tab** and enter all applicable staff names within the **Servicing Roles**      1. Click the **Employee Benefits Tab** to enter **Number of Employees.** This information will populate in the Auris Cross-Sell report to promote account growth. |

## New Business Quoting/Marketing Workflow

|  |
| --- |
| **New Business for Large and Middle Commercial should be sent to the South Platform New Business Placement Team at** [southcentralizedmarketingteam@acrisure.com](mailto:southcentralizedmarketingteam@acrisure.com)  **Best Practice:**   * Use [Marketing Module Lite](#_JA.2_Marketing_Module_1) for Carrier Submission (Acord Needed) **OR** * Use [Auris/Tarmika](https://auris.acrisure.com/app/placement) for rating **OR** * Use Online Carrier Portal for rating |

### Quoting Using Auris/Tarmika or Online Carrier Quoting (No Acord Needed)

|  |  |
| --- | --- |
| **Add manual activity (F9)**  Create a**QNEW** for **each** carrier quoting to document file and save attachments. All quoting documentation is attached to the corresponding Carrier **QNEW** activity.     1. Go to Full Screen Add 2. Enter activity code: **QNEW** (New Business)   **Additional Details**   1. Enter the PPE (Carrier or Broker) quoting with  * Once quotes are received, the quoted premium will be added  1. Present quotes to the client when ready  * For **binding carrier(s),** close the **QNEW** for the carrier as successful and add final notes. * For **non-binding carrier(s)** close each **QNEW** as unsuccessful and select reason; add notes  |  | | --- | | When bound, follow [Add Policy](#_Add_New_Policy) Workflow | |

### Policy & Line – EPIC Data Standards

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Policy Key Fields**   |  |  | | --- | --- | | * **Policy Type** * **Policy Number** * **Effective & Expiration Dates** | * **Policy Source** * **Department** * **Policy Estimated Premium** (LEAVE BLANK) |   **Line Key Fields**   |  |  | | --- | --- | | * **Line Type** * **Line Status** (see [Policy Status](#_Policy_Statuses)) * **Bill Mode** * **Profit Center** * **ICO & PPE** * **Line Commission** * **Line Estimated Premium** | * **Line Estimated Commission** * **Line Billing – Financed** * **Line Billing – Send Invoice To** * **Line P&C Producer** * **Line P&C Servicer** * **Producer/Broker Payable (PR/BR)** | |

### Add New Policy

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| 1. Click **Policies** from the Navigation Panel (left) 2. Click the **ADD** button - select **Contracted** policy 3. Enter Policy Details:    1. Select **Policy Type** from dropdown list (click the Description header to sort by description)    2. **Policy Line** – description will default    3. **Policy Number** – enter Policy Number or TBD if unknown. Policy number must match DEC Page    4. **Effective/Expiration Date**: dates must match DEC Page.  |  | | --- | | See [Continuous Policies](#_Continuous_Policies_(policies) or [Muti-year Policies](#_Multi-Year_Policies) for more instruction as needed |  * 1. **Policy Source:** Select from the dropdown list how policy was generated   2. **Agency = 1SO**   3. **Branch = 1SO** **unless** the entity you work for is in earnout or must use its legal business name   4. **Department:** Select the department based on the **Total Revenue of all Commercial Policies**  |  |  | | --- | --- | | CLS | Commercial Small (<5k Revenue) | | CLM | Commercial Middle (5k-50k Revenue) | | CLL | Commercial Large (50k+ Revenue) |  * 1. **Policy Estimated Premium/Commission** – **KEEP THIS BLANK.** This is tracked at the Line level   2. **Status** = Select **NEW**   3. **Issuing Location** – verify   4. **Bill Mode**: Select Agency or Direct Bill   5. **Profit Center** = Select Com-Commercial **unless** the policy fits into a specific **practice group**  (Note: Options shown in the dropdown are based on Department selected)   6. **Issuing Company (ICO)** – Select from dropdown list (Click description header to sort by Name). ICO should match the Policy DEC page   7. **Premium Payable Entity (PPE)** - Select from dropdown list (Click description header to sort by Name)      * 1. If PPE is a Broker, change **CA** to **BR** and enter broker name from dropdown list     **NOTE: Be sure to select the appropriate PPE Contract if BR is selected)**     * 1. **Line Commission**:  1. If Carrier Commission **is** Known: Enter carrier policy commission percentage. This can be found on the quote or carrier/broker invoice. 2. If Carrier Commission **is NOT** Known: Mark Checkbox **‘Use Commission Agreement’**  * Commission Agreement will Prefill * Verify Selected Agreement – **Policy – ‘Acrisure Estimated Rate’**   1. **Line Estimated Premium:** Estimate Annual Premium only (no taxes or fees). Enter premium quoted. **Package policies – Estimated Premium MUST be split between each line**   2. **Line Estimated Commission:** Selecting the blue **Calculate** will auto bill based off Line Estimated Commission and Line Estimated Premium     **LEAVE BLANK**   1. Click **Detail** 2. **ACTIVITY:** Select **APOL**    1. Verify Who/Owner    2. Follow-up/Start Date    3. Add Notes    4. Click **Finish** 3. From the Navigation Panel, click **Servicing/Billing > Line**    1. **Producer/Broker Payable (Pr/Br) Tab:** Each policy requires at least one PPAY (NOTE: PPAYs are Employees; BPAYs are outside brokers)       1. If an Advisor/Producer is getting paid commission on a policy, enter his/her name from the dropdown list.       2. When selected, their commission agreement will default          1. Be sure to enter 100% Production Credit (this is not commission related but gives the Advisor/Producer credit for booking the business written). **NOTE:** BPAYs never receive Production Credit    2. **Line Servicing Tab**: Verify Servicing Roles.    3. **Line Billing Tab**       1. Check box if Financed       2. Verify Send Invoice To. Choose the Main Business Name for Contact so your Invoices are address to them.      1. **For Non-Download Carriers only:** update policy detail on the left panel prior to moving to step 8 2. Click the X on the left panel 3. Click – Yes Perform Action > **Update Stage to Submitted** (if an Acord form needs to be sent to the carrier, Perform Action > **Submit Application** to generate the Acord for distribution) click **Finish**. |

#### One Time Policies

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| When the policy is added into EPIC, you will need to add the Agency Defined Category of **One Time Policy**. Adding this ADC to the policy will make sure the policy is removed from Renewal/Expiration Reports from EPIC and AcriVision.  Types of One Time Policies   * Per Project Builders Risk * Notary Bonds * Special Events  1. Add One Time Policy into EPIC 2. Under the **Servicing/Billing>Line** and the **Categories/History Tab** you will add the **One Time Policy** Agency Defined Category.   A screenshot of a computer  Description automatically generated |

### Policy Received From Carrier

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| --- | --- |
| **Note**: Please continue with your current Policy checking process whether that is a Third-Party Vender or internal processor.   1. Policy Check for accuracy. Open **APOL** or **BND1** Activity and reassign to Third-Party Vendor or Processor 2. Processor will create a note when policy checking complete and will attachpolicy document to **Activity** in client's account (if not received via eDocs) 3. If policy NOT downloaded:    1. Highlight policy, **click ACTIONS > Issue/Not Issue Policy**    2. **Issue**; enter/verify policy number; verify effective/expiration dates    3. Click **Close Activity tab**:  close **APOL/BND1** successful 4. If policy is downloaded:    1. The download will issue the policy and update detail    2. The open **APOL/BND1** Activity will need to be closed manually  |  | | --- | | [Issue EPIC Auto ID Cards](#_Auto_ID_Cards)  [Issue EPIC Evidence of Property Insurance](#_Evidence_of_Property)  [Issue EPIC Certificates of Liability](#_Certificate_Processing_in)  [CSR24 Client Processing](https://acrisure.sharepoint.com/sites/AcriWorld/Shared%20Documents/Forms/AllItems.aspx?FolderCTID=0x01200008AF4B3768355743A4CA96C4C3214460&id=%2Fsites%2FAcriWorld%2FShared%20Documents%2FEnterprise%5FSolutions%5FCenter%2FPlatforms%2FSouth%2FEpic%2C%20CSR24%2C%20%26%20Indio%20Resources%2FCSR24%20Workflows&viewid=f6de5ddd%2Dd0d1%2D4fcf%2Daf55%2D3160191957d5) (Certs, Client Portal)  Agency Billing/[Accounting Activities](https://acrisure.sharepoint.com/:w:/s/ACR-ABSAccountingTeam/ESAdZgcBwPdJt0_n5-hNILkBueeqZpQWrGK6rg54rr9l7g?e=Vg3PwS) | |

### Add BOR Policy Workflow

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| --- |
| Follow [Add Account Workflow](#_Add_New_Client) for new clients or if existing client locate Client Account.  1. Click Policies from the Navigation Panel (left) 2. Click the **ADD** button - Select whether the policy is Prospective or Contracted 3. Enter Policy Type from dropdown list 4. Change Policy Description as needed 5. Enter policy number if known 6. Verify the following:    1. **Effective and expiration dates** (defaults to system date and one year term)    2. **Source:** choose from the dropdown **(required field)**    3. **Structure**: Agency, Branch, Department (Set defaults under Config/User Options)    4. **Lines of Business**:    5. Policy Line    6. Status = **BOR**    7. Select Profit Center    8. [**Issuing Company**](#_Select_the_Correct)    9. [**Premium Payable Company**](#_Select_the_Correct_1). If PPE is a Broker, change **CA** to **BR** and enter broker name from dropdown list    10. Add Carrier Commission percentage if known **(if unknown Check box “Use Commission Agreement”)**    11. Click Detail    12. Activity = **BORP**    13. Add detailed notes, leave open to follow up on receipt of policy; click **Finish**. 7. Complete:    1. **PR/BR Tab:** Enter PR/BR name from dropdown list, if area is not defaulted.    2. **Servicing Tab:** Enter Policy Producer and Policy Servicer    3. **Billing Tab:** Verify Invoice information and delivery method    4. **Line Tab:** Enter Estimated Premium and Estimated Commission if known 8. Follow Steps for [Policy Received from Carrier](#_Policy_Received_From_2) above. 9. After Policy Checking is Complete, close out **BORP** activity with detailed notes and add final documents to the Policy level. |

## Renew Policy Workflow

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| **Best Practices:**   * Review upcoming Expiration Report * Review Home Base for automatic pre-renewal activity (**CLRR – CL – Renewal Review**). If activity is not automatically generated one may be created manually. |

### Downloaded Renewals

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| * Downloaded policies will automatically renew the new term as Issued and **update status to REN** * **ZREN** automatic closed activity (created by download) * Review daily download report – **update policy/client record with any missing information** * EDoc attached |

### Non-Downloaded Renewals

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Note**: This process is mainly used for Non-downloaded renewals that are staying with the Incumbent.   1. Renew policy in Epic – From expiring Policy: **ACTIONS> Renew** 2. Review details and update as needed:  |  |  | | --- | --- | | * + **Policy Type** * **Policy Number** * **Effective & Expiration Dates** | * **Status - REN** * **Profit Center** * **ICO & PPE** | | * **Department** | * **Line Commission** | | * **Policy Estimated Premium** (Leave Blank) |  |     **Delete Premium and Commission**   1. Click **Detail** 2. Select **RPOL** Activity – Add notes and use follow up date as needed 3. Click **Finish** 4. **Under Servicing/Billing > Line** update: **Estimated Line Premium and Line Commission,** at the Line level and **Calculate** the **Commission.**      1. Make sure to update any Policy Detail on the left panel 2. Little x out of the policy  * If Policy has been Issued - Close Policy detail > **Update Stage to Issued** * If Policy has been submitted for Binding – Close Policy Detail > **Update Stage to Submitted**  1. Select **RPOL** Activity - add notes, documentation and use follow up date as needed. 2. If Renewal is complete and no follow up is needed close **RPOL** activity 3. If Renewal is not complete and follow up is needed leave **RPOL** activity open  |  | | --- | | [Issue EPIC Auto ID Cards](#_Auto_ID_Cards)  [Issue EPIC Evidence of Property Insurance](#_Evidence_of_Property)  [Issue EPIC Certificates of Liability](#_Certificate_Processing_in)  [CSR24 Client Processing](https://acrisure.sharepoint.com/sites/AcriWorld/Shared%20Documents/Forms/AllItems.aspx?FolderCTID=0x01200008AF4B3768355743A4CA96C4C3214460&id=%2Fsites%2FAcriWorld%2FShared%20Documents%2FEnterprise%5FSolutions%5FCenter%2FPlatforms%2FSouth%2FEpic%2C%20CSR24%2C%20%26%20Indio%20Resources%2FCSR24%20Workflows&viewid=f6de5ddd%2Dd0d1%2D4fcf%2Daf55%2D3160191957d5) (Certs, Client Portal)  Agency Billing/[Accounting Activities](https://acrisure.sharepoint.com/:w:/s/ACR-ABSAccountingTeam/ESAdZgcBwPdJt0_n5-hNILkBueeqZpQWrGK6rg54rr9l7g?e=Vg3PwS) | |

## Renewal Remarket/Rewrite Policy Workflow

|  |
| --- |
| **Best Practice:**   * Use [Marketing Module Lite](#_JA._2_Marketing_1) or [Marketing Module Full](#_JA.2_Marketing_Module) for Carrier Submission (Acord Needed) **OR** * Use [Auris/Tarmika](https://auris.acrisure.com/app/placement) for rating **OR** * Use Online Carrier Portal for rating |

### Remarket Using Auris/Tarmika or Online Carrier Quoting (No Acords Needed)

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| **Add manual activity (F9)**  Create a**QREW** for **each** carrier quoting to document file and save attachments. All quoting documentation is attached to the corresponding Carrier **QREW** activity.   1. Go to Full Screen Add 2. Enter activity code: **QREW** (Renewal/Rewrite)   **Additional Details**   1. Enter the PPE (Carrier or Broker) quoting with 2. Once quotes are received, the quoted premium will be added 3. Present quotes to the client   **Update Activity When Quote Selected**   * For **binding** **carrier**, close the **QREW** for the carrier as successful add final notes; * For **non-binding** **carriers**, close each **QREW** as unsuccessful and select reason; add notes  |  | | --- | | If bound with **New Carrier**, follow [Renewal/Rewrite Policy](#_Renew_Downloading_Policy)  If bound with **Incumbent**, follow [Downloaded Renewals](#_Downloaded_Renewals) or [Non-Downloaded Renewals](#_Non-Downloaded_Renewals)  **\*\*NOTE:** If expiring carrier has already downloaded the renewal, and a new carrier is selected for the new term, follow the[Cancellation Workflow](#_Cancel_Policy)to cancel the downloaded renewal flat and use the CREW activity code. |      |  | | --- | | [Issue EPIC Auto ID Cards](#_Auto_ID_Cards)  [Issue EPIC Evidence of Property Insurance](#_Evidence_of_Property)  [Issue EPIC Certificates of Liability](#_Certificate_Processing_in)  [CSR24 Client Processing](https://acrisure.sharepoint.com/sites/AcriWorld/Shared%20Documents/Forms/AllItems.aspx?FolderCTID=0x01200008AF4B3768355743A4CA96C4C3214460&id=%2Fsites%2FAcriWorld%2FShared%20Documents%2FEnterprise%5FSolutions%5FCenter%2FPlatforms%2FSouth%2FEpic%2C%20CSR24%2C%20%26%20Indio%20Resources%2FCSR24%20Workflows&viewid=f6de5ddd%2Dd0d1%2D4fcf%2Daf55%2D3160191957d5) (Certs, Client Portal)  Agency Billing/[Accounting Activities](https://acrisure.sharepoint.com/:w:/s/ACR-ABSAccountingTeam/ESAdZgcBwPdJt0_n5-hNILkBueeqZpQWrGK6rg54rr9l7g?e=Vg3PwS) | |

### Renew Remarketed/Rewritten Policy Set Up – Download

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| |  | | --- | | **Policies rewritten from one carrier to a new carrier will use an Actions>Copy Policy instead of Actions>Renew and the expiring carrier renewal download will need to be cancelled flat.**  **Copying the policy instead of renewing it will make sure the Rewritten policy is downloaded correctly.  Confirming the expiring carrier renewal download is cancelled will remove the policy from Expiration and Potentially Missed Renewal reports.** |   If Remarketed Policy **Downloads:**   1. Select **EXPIRING** policy term 2. Click **Actions > Copy Policy** 3. **Destination** – To current account 4. Verify **Structure** 5. **Policy Detail** 6. Description 7. Policy Number 8. Effective/Expiration Date 9. **Lines of Business** (if more than one line of business, each line needs to be updated) 10. Verify Line(s) of Business 11. Policy Status **REW – Rewrite** 12. Billing – **Agency** or **Direct** 13. Profit Center – Select from dropdown 14. Issuing Company/Premium Payable 15. **Line Commission –** Enter carrier commission percentage if known  * **If Commission is Unknown –** * Check the box to use commission agreement * Select the policy type with **Acrisure Estimated Rate** in the dropdown   **A screenshot of a computer screen  AI-generated content may be incorrect.**   1. Click **Detail** 2. Policy Opens - Click **Servicing/Billing > Line** on left Navigation Panel 3. **Servicing** tab – Verify required Servicing Contacts 4. **Pr/Br Commissions** tab – Verify Commission Agreement 5. Click the **X** on the left Navigation Panel to close out of Policy Detail 6. If Policy has been Submitted to the Carrier for binding – Close Policy Detail > **Update Stage to Submitted** 7. Click **Finish** 8. If Activity for following up on policy issuance, utilize **CLRR** activity. 9. When **Expiring** carrier has downloaded the renewal; proceed with one of the following options:  * Confirm for carrier Cancellation Download and update policy status to **CRW – Cancelled – Rewritten** * Follow the [Cancellation Workflow](#_Cancel_Policy_Workflow) to cancel the downloaded renewal flat. Policy status of **CRW – Cancelled – Rewritten** and utilize the **CREW** activity code if needed  |  | | --- | | [Issue EPIC Auto ID Cards](#_Auto_ID_Cards)  [Issue EPIC Evidence of Property Insurance](#_Evidence_of_Property)  [Issue EPIC Certificates of Liability](#_Certificate_Processing_in)  [CSR24 Client Processing](https://acrisure.sharepoint.com/sites/AcriWorld/Shared%20Documents/Forms/AllItems.aspx?FolderCTID=0x01200008AF4B3768355743A4CA96C4C3214460&id=%2Fsites%2FAcriWorld%2FShared%20Documents%2FEnterprise%5FSolutions%5FCenter%2FPlatforms%2FSouth%2FEpic%2C%20CSR24%2C%20%26%20Indio%20Resources%2FCSR24%20Workflows&viewid=f6de5ddd%2Dd0d1%2D4fcf%2Daf55%2D3160191957d5) (Certs, Client Portal)  Agency Billing/[Accounting Activities](https://acrisure.sharepoint.com/:w:/s/ACR-ABSAccountingTeam/ESAdZgcBwPdJt0_n5-hNILkBueeqZpQWrGK6rg54rr9l7g?e=Vg3PwS) | |

### Renew Remarketed/Rewritten Policy Set Up – Non-Download

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| 1. From expiring Policy: **ACTIONS> RENEW** 2. Review details:  |  |  | | --- | --- | | * + **Policy Type** * **Policy Number** * **Effective & Expiration Dates** | * **Status – REW (Renewal-Rewrite)** * **Profit Center** * **ICO & PPE** (Change to new ICO and PPE) | | * **Department** | * **Line Commission** | | * + **Policy Estimated Premium** (Leave Blank) | |   A screenshot of a computer  AI-generated content may be incorrect.  **LEAVE BLANK**   1. Click **Detail** 2. Select **RPOL** Activity – Add notes and use follow up date as needed 3. Click **Finish** 4. **Under Servicing/Billing > Line** update: **Estimated Line Premium,** at the Line level and **Calculate** the **Commission.**   A screenshot of a computer screen  AI-generated content may be incorrect.   1. **Non-Downloading Policies** - Make sure to update any Policy Detail on the left panel: **Downloading Policy** - Policy Detail will be updated by Download 2. Click the X on the left panel 3. If Policy has been Issued - Close Policy detail > **Update Stage to Issued** 4. If Policy has been submitted for Binding – Close Policy Detail > **Update Stage to Submitted** 5. Select **RPOL** Activity - add notes, documentation and use follow up date as needed.  * If Renewal is complete and no follow up is needed close **RPOL** activity * If Renewal is not complete and follow up is needed leave **RPOL** activity open  |  | | --- | | [Issue EPIC Auto ID Cards](#_Auto_ID_Cards)  [Issue EPIC Evidence of Property Insurance](#_Evidence_of_Property)  [Issue EPIC Certificates of Liability](#_Certificate_Processing_in)  [CSR24 Client Processing](https://acrisure.sharepoint.com/sites/AcriWorld/Shared%20Documents/Forms/AllItems.aspx?FolderCTID=0x01200008AF4B3768355743A4CA96C4C3214460&id=%2Fsites%2FAcriWorld%2FShared%20Documents%2FEnterprise%5FSolutions%5FCenter%2FPlatforms%2FSouth%2FEpic%2C%20CSR24%2C%20%26%20Indio%20Resources%2FCSR24%20Workflows&viewid=f6de5ddd%2Dd0d1%2D4fcf%2Daf55%2D3160191957d5) (Certs, Client Portal)  Agency Billing/[Accounting Activities](https://acrisure.sharepoint.com/:w:/s/ACR-ABSAccountingTeam/ESAdZgcBwPdJt0_n5-hNILkBueeqZpQWrGK6rg54rr9l7g?e=Vg3PwS) | |

### Policy Received from Carrier

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| **Note**: Please continue with your current Policy checking process whether that is a Third-Party Vender or internal processor.   1. Policy Check for accuracy. Make sure all binding docs are attached to **Activity**. Reassign **CLRR, RPOL** or **BND1** Activity to Third-Party Vendor or Processor 2. If policy NOT downloaded:    1. Highlight policy, **click ACTIONS > Issue/Not Issue Policy**    2. **Issue**; enter/verify policy number; verify effective/expiration dates    3. Click **Close Activity tab**:  close **RPOL**/**BND1** successful 3. If policy is downloaded:    1. The download will issue the policy and update detail    2. The open **CLRR/RPOL**/**BND1** Activity will need to be closed manually  |  | | --- | | [Issue EPIC Auto ID Cards](#_Auto_ID_Cards)  [Issue EPIC Evidence of Property Insurance](#_Evidence_of_Property)  [Issue EPIC Certificates of Liability](#_Certificate_Processing_in)  [CSR24 Client Processing](https://acrisure.sharepoint.com/sites/AcriWorld/Shared%20Documents/Forms/AllItems.aspx?FolderCTID=0x01200008AF4B3768355743A4CA96C4C3214460&id=%2Fsites%2FAcriWorld%2FShared%20Documents%2FEnterprise%5FSolutions%5FCenter%2FPlatforms%2FSouth%2FEpic%2C%20CSR24%2C%20%26%20Indio%20Resources%2FCSR24%20Workflows&viewid=f6de5ddd%2Dd0d1%2D4fcf%2Daf55%2D3160191957d5) (Certs, Client Portal)  Agency Billing/[Accounting Activities](https://acrisure.sharepoint.com/:w:/s/ACR-ABSAccountingTeam/ESAdZgcBwPdJt0_n5-hNILkBueeqZpQWrGK6rg54rr9l7g?e=Vg3PwS) | |

## Policy Not Renewed Workflow

### Mark Policy as Not Renewed

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| **Download:**   * Review **Download Report** and/or open **ZCAN** or **ZNON** activities. * Download will **automatically** update the: * Service Summary Stage to **Cancelled** * Policy Status to **Cancelled (Renewal)** * Policy status will need to be verify: from the left panel click Servicing/Billing > Line and update the policy status to: * **Not-Renewed – X-N or X-R** (select based on original status) * If **Lost** Policy - Close the **CPOL** and/or **ZCAN / ZNON**activity as **Unsuccessful** and select reason; add notes and click Finish * If **Rewritten** Policy – Close the **CREW** and/or **ZCAN / ZNON**activity as **Successful**; add notes and click Finish.   **Non-Download:**   * From the client’s account, click **Policies** from the left panel * Double click the policy which is not renewing * In the left panel, click **Servicing/Billing > Line** * Update the policy status to **X-N (Not-Renewed NEW) or X-R** **(Not Renewed REN)** (Select based on original policy status) * Click the X on the left panel * With the policy highlighted, press F9 (or click **NEW > Activity**) and select the **GNRN** Activity   + Add notes as to why the policy not renewed   + Mark as Closed – Unsuccessful; select reason * Click Finish |

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| **\*Important Notes:**   * **If the client is cancelling all policies and business has been lost: –** * **For tracking a Win Back -** change client from Insured to Prospect * **For NOT tracking a Win Back –** change from Insured to Inactive. Also, uncheck the box to send out marketing campaigns to be sure nothing is sent out to client |

## Policy Change Workflow

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

### Process Change Request (Existing Line)

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| 1. Receive policy change request from client 2. In Epic – **ACTIONS > Endorse/Revise Existing Line;** enter:    1. Effective date of change    2. Description of change    3. Details    4. **Activity = CHGE**    5. Add detailed notes:  who called, what did they ask for, your responses or direction, etc.; click Finish   **Downloaded Policies:**   1. Process change on carrier website 2. Click the X on the left panel to close out of the policy detail 3. Click Yes Perform Action > **Update Stage to Submitted** 4. Attach bind confirmation, emails with client/carrier, etc. to the **CHGE** activity   **Non-Downloaded Policies:**   1. Update ACORD detail in Epic to include the change requested 2. Click the X on the left panel 3. If a Policy Change Request ACORD is required: **Submit Change Request** 4. If change request as submitted to carrier per email or at the carrier site: **Updated Stage to Submitted** 5. Attach email/change request to the **CHGE** activity. 6. Leave Activity Open for follow up    1. Attach email/change request to the **CHGE** activity |

#### Endorsement Received from Carrier

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| **Note**: Please continue with your current Policy checking process whether that is a Third-Party Vender or internal processor.  **Downloaded Policies:**   1. Review daily download list – review download audit report and update missing information 2. Policy check    1. Reassign the **CHGE** Activity to Third Party Vendor or Processor to verify what was requested is correct in the Endorsement    2. Third Party Vendor/Processor will add notes to the **CHGE** activity and close successful if Endorsement was issued correctly    3. If Endorsement incorrect, keep the **CHGE** open and send request back to the carrier for correction. When received, check again, and close the **CHGE** activity. 3. Download will update the service summary row and **Issue** the endorsement 4. Attach actual policy endorsement to the **CHGE** in Epic, if not attached as eDoc download   **Non-Downloaded Policies:**   1. Policy check to verify what was requested is correct in the endorsement.    1. **Update Line Estimated premium on the policy**    2. **Double click on policy**    3. **Under Servicing/Billing>Line; Update the Estimated Premium to show the Additional or Return premium.**       1. **Example: Current policy premium is $1,000. A change was made which increase the premium by $200. Change the Line Estimated Premium to $1,200**    4. **Hit the blue Calculate next to Commission and the EPIC will calculate the commission.** 2. Close the **CHGE** activity (add notes as applicable)    1. If Endorsement incorrect, keep the **CHGE** open and send request back to the carrier for correction. When received, check again, and close the **CHGE** activity.    2. Attach policy endorsement to the **CHGE** in Epic  From policy, **ACTIONS > Issue/Not Issue Endorsement** 3. Verify effective date of change and other details; Issue 4. Click **Open Activity** tab: Close the **CHGE** activity as successful; click Finish  |  | | --- | | [Issue EPIC Auto ID Cards](#_Auto_ID_Cards)  [Issue EPIC Evidence of Property Insurance](#_Evidence_of_Property)  [Issue EPIC Certificates of Liability](#_Certificate_Processing_in)  [CSR24 Client Processing](https://acrisure.sharepoint.com/sites/AcriWorld/Shared%20Documents/Forms/AllItems.aspx?FolderCTID=0x01200008AF4B3768355743A4CA96C4C3214460&id=%2Fsites%2FAcriWorld%2FShared%20Documents%2FEnterprise%5FSolutions%5FCenter%2FPlatforms%2FSouth%2FEpic%2C%20CSR24%2C%20%26%20Indio%20Resources%2FCSR24%20Workflows&viewid=f6de5ddd%2Dd0d1%2D4fcf%2Daf55%2D3160191957d5) (Certs, Client Portal)  Agency Billing/[Accounting Activities](https://acrisure.sharepoint.com/:w:/s/ACR-ABSAccountingTeam/ESAdZgcBwPdJt0_n5-hNILkBueeqZpQWrGK6rg54rr9l7g?e=Vg3PwS) | |

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

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

#### Endorsement Received from Carrier

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| **Note**: Please continue with your current Policy checking process whether that is a Third-Party Vender or internal processor.  **Downloaded Policies:**   1. Review daily download list – review download audit report and update missing information 2. Policy check    1. Reassign the **CHGE** Activity to Third Party Vendor or Processor to verify what was requested is correct in the Endorsement    2. Third Party Vendor/Processor will add notes to the **CHGE** activity and close successful if Endorsement was issued correctly    3. If Endorsement incorrect, keep the **CHGE** open and send request back to the carrier for correction. When received, check again, and close the **CHGE** activity. 3. Download will update the service summary row and **Issue** the endorsement 4. Attach actual policy endorsement to the **CHGE** in Epic, if not attached as eDoc download   **Non-Downloaded Policies:**   1. Policy check to verify what was requested is correct in the endorsement.    1. **Update Line Estimated premium on the policy**    2. **Double click on policy**    3. **Under Servicing/Billing>Line; Update the Estimated Premium to show the Additional or Return premium.**       1. **Example: Current policy premium is $1,000. A change was made which increase the premium by $200. Change the Line Estimated Premium to $1,200**    4. **Hit the blue Calculate next to Commission and the EPIC will calculate the commission.** 2. Close the **CHGE** activity (add notes as applicable)    1. If Endorsement incorrect, keep the **CHGE** open and send request back to the carrier for correction. When received, check again, and close the **CHGE** activity.    2. Attach policy endorsement to the **CHGE** in Epic  From policy, **ACTIONS > Issue/Not Issue Endorsement** 3. Verify effective date of change and other details; Issue 4. Click **Open Activity** tab: Close the **CHGE** activity as successful; click Finish  |  | | --- | | [Issue EPIC Auto ID Cards](#_Auto_ID_Cards)  [Issue EPIC Evidence of Property Insurance](#_Evidence_of_Property)  [Issue EPIC Certificates of Liability](#_Certificate_Processing_in)  [CSR24 Client Processing](https://acrisure.sharepoint.com/sites/AcriWorld/Shared%20Documents/Forms/AllItems.aspx?FolderCTID=0x01200008AF4B3768355743A4CA96C4C3214460&id=%2Fsites%2FAcriWorld%2FShared%20Documents%2FEnterprise%5FSolutions%5FCenter%2FPlatforms%2FSouth%2FEpic%2C%20CSR24%2C%20%26%20Indio%20Resources%2FCSR24%20Workflows&viewid=f6de5ddd%2Dd0d1%2D4fcf%2Daf55%2D3160191957d5) (Certs, Client Portal)  Agency Billing/[Accounting Activities](https://acrisure.sharepoint.com/:w:/s/ACR-ABSAccountingTeam/ESAdZgcBwPdJt0_n5-hNILkBueeqZpQWrGK6rg54rr9l7g?e=Vg3PwS) | |

## Cancel Policy Workflow

### Cancel Monoline Policy

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| 1. Locate Account 2. Select Policy 3. **ACTIONS > Cancel** 4. Select Policy Release 5. Enter Effective Date of Cancellation 6. Enter a description 7. Click DETAIL    * Activity: **CPOL-** Add notes (who, what, where, when how) or **CREW** if rewriting with a new carrier    * Click Finish 8. From the left panel, enter Reason/Method, Additional Interest, and Remarks as needed. 9. X out of Policy (from the left navigation panel) 10. To generate the Lost Policy Release, click **PRINT > Cancellation** 11. Select **Attach Without Distributing** 12. From Attachments, right click on the LPR and select **send to eSignature**  |  | | --- | | Follow [DocuSign](#_JA._5_DocuSign) workflow | |

#### Signed LPR Received:

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| 1. DocuSign will send a verification email confirming the LPR was signed and will automatically attach the signed LPR to the Attachments area of the client’s account 2. Add notes to the **CPOL** or **CREW** Activity 3. **Option 1: Submit Cancellation request through Carrier Website**     * Enter cancellation on carrier website    * Select Policy and **ACTIONS** > **Update Stage to Submitted**—Click Finish    * Add notes to the **CPOL** or **CREW** activity   **Option 2: Submit Cancellation through Epic**   * + Select the signed LPR from attachments   + Right click and **Send Via Email** to the carrier   + Highlight the policy in question; then click **ACTIONS > Update Stage to Submitted**   + Add notes to the **CPOL** or **CREW** activity |

#### Cancellation Confirmation Received from Carrier:

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| **Download:**   * Review **Download Report** and/or open **ZCAN** or **ZNON** activities. * Download will **automatically** update the: * Service Summary Stage to **Cancelled** * Expiration date to the **Cancellation Date** * Policy Status to **CRN** -**Cancelled (Renewal)** * Policy status will need to be verified: from left navigation panel click **Servicing/Billing > Line** and update the policy status as needed to: * **CNR – Cancelled (NEW)** or * **CRW - Cancelled – Rewritten (Flat or Mid-Term Rewrite)** * Mark open **ZCAN/ZNON** task as completed. * If **Lost** Policy - Close the **CPOL** and/or **ZCAN / ZNON**activity as **Unsuccessful** and select reason; add notes and click Finish * If **Rewritten** Policy – Close the **CREW** and/or **ZCAN / ZNON**activity as **Successful**; add notes and click Finish.   **Non-Download:**   * Select Policy then **ACTIONS** > **Issue Cancellation** – verify details * **Update policy status to Cancelled – CNW or CRN** (select based on original status) * Close the **CPOL** activity as **Unsuccessful** and select reason; add notes; click Finish * **OR** **if policy was rewritten**, close the **CREW** activity as Successful add notes, click Finish. * Update policy status to **CRW** * Attach Cancellation Confirmation to the **Activity**—update description and select folder |

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| **\*Important Notes:**   * **If the client is cancelling all policies and business has been lost: –** * **For tracking a Win Back -** change client from Insured to Prospect * **For NOT tracking a Win Back –** change from Insured to Inactive. Also, uncheck the box to send out marketing campaigns to be sure nothing is sent out to client |

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

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| 1. From the Client’s account, click **Policies** from the left navigation panel 2. Select the policy line to be cancelled; click **ACTIONS > Cancel** 3. If the client’s signature is required on a Lost Policy Release form, select Policy Release, otherwise, select Cancellation Request 4. Enter Effective Date of cancellation 5. Enter description as to why cancelling 6. **Uncheck all lines NOT being cancelled** and **check only the line which IS being cancelled** 7. Click DETAIL 8. Select **CPOL Activity** - change Description to reflect only the one line in the package policy being cancelled    1. Activity = Open for follow-up on receipt of cancel confirmation/endorsement from the carrier    2. Add notes as to why cancelling    3. Click **FINISH** |

#### Signed LPR Received:

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| 1. DocuSign will send a verification email confirming the LPR was signed and will automatically attach the signed LPR to the Attachments area of the client’s account 2. Add notes to the **CPOL** or **CREW** Activity 3. **Option 1: Submit Cancellation request through Carrier Website**     * Enter cancellation on carrier website    * Select Policy and **ACTIONS** > **Update Stage to Submitted**—Click Finish    * Add notes to the **CPOL** or **CREW** activity   **Option 2: Submit Cancellation through Epic**   * + Select the signed LPR from attachments   + Right click and **Send Via Email** to the carrier   + Highlight the policy in question; then click **ACTIONS > Update Stage to Submitted**   + Add notes to the **CPOL** or **CREW** activity |

#### Cancel Confirmation Received from Carrier:

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| **Download:**   * Review **Download Report** and/or open **ZCAN** or **ZNON** activities. * Download will **automatically** update the: * Service Summary Stage to **Cancelled** * Expiration date to the **Cancellation Date** * Policy Status to **Cancelled (Renewal)** * Policy status will need to be verify: from the left panel click Servicing/Billing > Line and update the policy status to: * **Cancelled – CNW or CRN** (select based on original status) or * **Cancelled – Rewritten – CRW** (Cancel/Rewrite) * If **Lost** Policy - Close the **CPOL** and/or **ZCAN / ZNON**activity as **Unsuccessful** and select reason; add notes and click Finish * If **Rewritten** Policy – Close the **CREW** and/or **ZCAN / ZNON**activity as **Successful**; add notes and click Finish.   **Non-Download:**   * Select Policy then **ACTIONS** > **Issue Cancellation** – verify details * **Update policy status to Cancelled – CNW or CRN** (select based on original status) * Click the **Close Open Activity** tab and close the **CPOL** activity as **Unsuccessful** and select reason; add notes; click Finish   + **OR** **if policy was rewritten**, close the **CREW** activity as Successful add notes, click Finish.   + Update policy status to **CRW** * Attach Cancellation Confirmation to the **Activity**—update description and select folder |

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

## Policy Reinstated Workflow

### Reinstate Policy

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

### Reinstate Policy with Lapse

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| * From the client’s account, click **Policies** from the left panel * Select the **CANCELLED** policy to be reinstated * Click **ACTIONS > Reinstate** * Enter the date the policy was reinstated * Add Description – Reinstated with Lapse in coverage * Click **Finish** * Activity = **REIN**:   Add detailed notes as to why the policy was reinstated   + Close Activity **Successful**; click **Finish** * Verify the Policy Status was updated correctly per the original Policy Status * If there is an original closed **CPOL** Activity; Reopen **CPOL** Activity, then Close as **Successful** |

## Claims Workflow

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| --- |
| **If referring Claims to the Platform Centralized Claims Team:**  **Criteria for Centralized Claims Team:**   * **Already serviced by the Claims Team** * **Account has revenue of $50k or more** * **Account revenue less than $50K: Only refer** * **fatalities, agency issues, injury, more involved claims** |

### Add New Claim

|  |
| --- |
| 1. Locate Account 2. Click **NEW** Claim    * When receiving **claims download**, enter data in required fields only. Download will populate claims details.    * If **NOT receiving claims download**, enter all detail in all fields manually. 3. Click Detail 4. **ACLM** Activity – leave open for follow up.    * Add notes (who, what, where, when, how, why, etc.) - Click Finish. 5. Click all screens in the Navigation Panel to enter claim details 6. Click the X in the left panel to close out of claim detail 7. To **issue a Loss Notice**, highlight the claim; click **ACTIONS > Issue Loss Notice**  * Click the Distribution tab * Select Contact (use lookup button to locate) * Select Via (Print, Email) and enter additional details * Click Finish  1. Attach all claims documentation to the **ACLM** Activity |

#### Claim Updates

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

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

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

## Client Contracts/Services Workflow

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| 1. Locate Client Account 2. On the left Navigation Panel, click Client Contracts 3. Click Services 4. Click **ADD** button 5. Select a **Service Code** from the dropdown menu  |  |  |  | | --- | --- | --- | | **CODE** | **DESCRIPTION** | **DEPARTMENT** | | \*FLB | EB Fee in Lieu of Commission | BEL, BEM, BES | | \*FLC | CL Fee in Lieu of Commission | CLL, CLM, CLS | | \*FLP | PL Fee in Lieu of Commission | PEL, PEM, PES | | RCMP | Certificate Management Services – Project (NR) | CLL, CLM, CLS | | RCMA | Certificate Management Services (Annual) | CLL, CLM, CLS |  1. Enter Contract number, if applicable  **NOTE: When adding a New Service and including billable fees where there is no policy association, be sure to add #NEW in the Contract Number field** 2. Enter Description of the Service provided 3. Enter term of service from the dropdown menu, and the inception and expiration dates 4. **Be sure to enter the correct Agency/Branch & Department** 5. Click DETAIL 6. **ADSC** Activity defaults    * Verify Who/Owner    * Defaults as Closed, but mark as Open if follow up is needed and verify follow-up/start date    * Add Notes 7. Add Type of Fee (Flat or Hourly) 8. Enter contracted fee / contracted hours as needed 9. Click the **Association** tab: Click ADD to associate this service with existing client policy(ies) 10. Click the **Itemizations** tab: Click ADD   - Enter description of service  - Name of person who provided the service  - Account Contact  - Mileage (if applicable)  - Hours of service provided  - Hourly rate  - Calculate total   1. Click the Servicing Tab:  * Enter Policy Producer & Policy Servicer  1. Click the PR/BR Commissions Tab:    * Click ADD if someone will be receiving commission on the service fee and enter their percentage of commission and production credit 2. Click Attachments from the Navigation Panel and click the ADD button to add any attachments associated with the service (i.e., Service Contract, etc.) 3. When finished, close the Service from the Navigation Panel |

# JOB AIDS

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## JA. 1 Marketing Module Lite (New Business)

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| --- |
| The below process should be used when quoting ALL New Business.  **New Business for Large and Middle Commercial should be sent to the South Platform New Business Placement Team at** [southcentralizedmarketingteam@acrisure.com](mailto:southcentralizedmarketingteam@acrisure.com) |

### Add Master Marketing Submission

|  |
| --- |
| 1. Click **Policies** area from the left Navigation Panel of the Client’s account 2. Change policy view from **Current** to **Marketed**  1. Click the ADD button (+) 2. Enter a name for the Submission (Example: Master Submission 2024-25) 3. A screenshot of a computer     Description automatically generatedEnter required information (Source, Department & type of business) 4. Add policies to the submission by clicking the **ADD** button under Policies to Market. 5. **Add New Line**—Create new policy(ies) for marketing. When adding policies, make sure they have the correct Profit Center and Line Status   A screenshot of a computer  Description automatically generated   1. Select **Add** to add more lines or **Finish** when all lines needed have been added 2. Click **DETAIL** 3. Close the **AMMK** Activity – Finish 4. Enter policy detail by clicking each line in the navigation panel and completing each of the screens to fill in detail in the ACORD apps (be sure to add detail to the Commercial AP/ACORD 125 first) 5. Click the **Attachments** Tab and drag & drop all attachments to be included in the submission 6. When finished, close Submission from the left navigation panel (X) |

### Add QNEW Activity for Each Carrier

|  |
| --- |
| 1. From the **Policies Marketed** list view, highlight the **Master Submission** 2. Click the **NEW** button at the top in the blue bar; select **Activity** (or press F9). Double check the activity is associated to the **Master Submission** 3. On the bottom of the screen, click **Go to Full Screen Add** 4. Leave **OPEN**; add notes 5. Click **Save & Go to Detail** and complete the activity detail 6. Repeat above steps for **EACH** Carrier   A screenshot of a computer  Description automatically generated**A screenshot of a computer  Description automatically generated** |

### Send Applications/ACORD to Carrier

|  |
| --- |
| 1. Right click on the Master Marketing Submission created above 2. Select **Review Application** 3. Select the “Master Marketing Submission” radio button; click **Continue** 4. Click the **Organization Contact** tab and verify/update the agency address 5. Click the **Distribution** tab 6. Under **Delivery Options** select **“Attach Without Distributing”** 7. Click **Finish** 8. With the submission highlighted, click **ACCESS > Attachments**, **right click** on the ACORD, and select **Send Via Email** if emailing to the underwriter 9. If quoting online, add notes to the specific carrier’s open **QNEW** Activity. 10. Be sure to drag & drop all emails, documents, applications, etc. to **the specific carrier QNEW** |

### Carrier Responses Received

|  |
| --- |
| 1. Record carrier responses by adding NOTES and attaching ALL Carrier Documentation to the **QNEW** activity for the appropriate carrier.    1. Double click on the carrier’s **QNEW** activity    2. Enter detailed notes    3. **If carrier responded with a quote**, enter the amount of the quote in the amount field on the activity. Use “Premium” as the amount qualifier.   A screenshot of a computer  Description automatically generated  ***IMPORTANT! – Be sure* to add this information**   * 1. **If Carrier Responded with a declination**, Close the activity as Unsuccessful and select reason   2. Drag & Drop Carrier emails to the carrier’s **QNEW** Activity |

### Carrier Selected for Binding

|  |
| --- |
| 1. When a carrier is selected for **binding**, close **Successful** and add notes 2. **All other QNEW** activities should be **closed as Unsuccessful**, select a reason, and add notes as to why the carrier declined, or why the quote was rejected   A screenshot of a computer  Description automatically generated |

### Move Binding Carrier Submission to Current Policies

|  |
| --- |
| These steps must be followed in order **ONLY FOR THE BINDING CARRIER(S):**   1. Right click the Master Submission and select **Create Carrier Submission**    1. Premium Payable = select the binding carrier    2. Submission Status = Completed    3. Click Finish 2. Right click the Master Submission and select **Update Stage to Entered/Submitted**   A screenshot of a computer  Description automatically generated   * + Click Finish   ***The Steps above must be done to Generate an EPIC Proposal***   1. Right click the submission and select **Create Carrier Response**    * Description = Quoted / Bound    * Date Received = current date    * Carrier Response = Quote    * Enter Response Line Premium, carrier commission rate and click Calculate    * Click Finish   A screenshot of a computer  Description automatically generated   * + On the popup, select Yes Perform Action and select **Move Marketed Lines to Current Policies**   **A screenshot of a computer  Description automatically generated**  ***Policies Tab****:*   1. Select **Add new Policy** 2. Enter Policy Line, Description, Effective & Expiration Dates 3. Update Stage to: Submitted or In Process if policy detail edits are needed 4. Select Contracted policy   A screenshot of a computer  Description automatically generated  ***Lines Tab:***   1. Select the line(s) needing to be added to the new policy, renewal, or existing policy 2. Select **Add to this policy** - Adds the line to the policy added under the Policies tab  * Keep in mind, the choices made here affect only the highlighted line * Use **Apply to All Lines** if the choices apply to all lines and not just the highlighted line.  1. Under the LINE tab, select Status = NEW; enter Issuing Co (writing co); enter carrier commission rate   A screenshot of a computer  Description automatically generated   1. Click the **SERVICING** tab – verify the employees in each servicing role   A screenshot of a computer  Description automatically generated   1. Click the **PR/BR COMMISSIONS** tab   A screenshot of a computer  Description automatically generated   * + Click the ADD button to add the producer who will be paid commission on this policy   + Producer Commission will default   + Production credit should be 100%  1. When finished, click **MOVE**  * Update Submission status to Completed; click Finish  1. **BND1** Activity – Bind Policy via Master Marketing    * Leave open for receipt of policy    * Add Notes 2. Change Policy view from MARKETED to CURRENT |

### Policy Received from Carrier

|  |
| --- |
| 1. Drag & Drop the policy dec to the appropriate **Policy** in the client’s account 2. Issue the Policy in Epic:    * Highlight the policy    * Click ACTIONS > Issue/Not Issue Policy and **Issue**    * Verify Policy #, Effective/Expiration Dates, and Policy Status (NEW)    * Click the **Close Open Activities** tab and close the open **BND1** activity as Successful and add final note    * Click FINISH |

## JA. 2 Marketing Module Lite (Renewal/Remarket Business)

### Add Master Marketing Submission

|  |
| --- |
| 1. Click **Policies** area from the left Navigation Panel of the Client’s account 2. Change policy view from **Current** to **Marketed**      1. Click the ADD button (+) 2. Enter a name for the Submission (Example: 23-24 Master Submission) 3. Enter required information (Source, Department & type of business) 4. Add policies to the submission by clicking the **ADD** button under Policies to Market 5. **Add Line:**    * **Add existing line** – Used to Renew an existing policy    * Check Lines you want to remarket    * Click Finish 6. Click DETAIL 7. **AMMK** Activity  * Open if you need for Pre-Quoting documentation and follow up * Close if you already have a Pre-Renewal/Pre-Quoting activity  1. Click the **ATTACHMENTS** Tab and drag & drop all attachments to be included in the submission      1. Enter policy detail by clicking each line in the navigation panel and completing each of the screens to fill in detail in the ACORD apps (be sure to add detail to the Commercial AP/ACORD 125 first) 2. When finished, close Submission from the navigation panel (X) |

### Add QREW (Renewal) Activity for each carrier

|  |
| --- |
| 1. From the **Policies Marketed** list view, highlight the **Master Submission** 2. Click the **NEW** button at the top in the blue bar; select **Activity** (or press F9) 3. Click **Continue** 4. On the bottom of the screen, click Go to Full Screen Add 5. Code = **QREW** 6. Description = YY/YY LOB LOB LOB – Carrier (Est. Rev$ ##,###).   **Additional Details**   1. Enter the PPE (Carrier or Broker) quoting with  * Once quotes are received, the quoted premium will Leave OPEN; add notes   ***IMPORTANT! – Be sure* to add this information**   1. Under **Who to Contact** – Fill in your Underwriter Name and contact via      1. Click **Save Activity** 2. Repeat Steps 1-8 for **each** carrier |

### Send Applications to Carriers - Save & Submit ACORD Applications

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

### Carrier Responses Received

|  |
| --- |
| 1. Record carrier responses by adding NOTES and attaching ALL Carrier Documentation to the **QREW** activity for the appropriate carrier.    1. Double click on the carrier’s **QREW** activity    2. Enter detailed notes    3. **If carrier responded with a quote**, enter the amount of the quote in the amount field on the activity. Use “Premium” as the amount qualifier.     ***IMPORTANT! – Be sure* to add this information**   * 1. **If Carrier Responded with a declination**, Close the activity as Unsuccessful and select reason   2. Drag & Drop Carrier emails to the carrier’s **QREW** Activity |

### Carrier Selected for Binding

|  |
| --- |
| 1. When a carrier is selected for **binding**, close **Successful** and add notes 2. **All other QREW** activities should be **closed as Unsuccessful**, select a reason, and add notes as to why the carrier declined, or why the quote was rejected   A screenshot of a computer  Description automatically generated |

### Move Binding Carrier Submission to Current Policies

|  |
| --- |
| These steps must be followed in order **ONLY FOR THE BINDING CARRIER(S):**   1. Right click the Master Submission and select **Create Carrier Submission**    1. Premium Payable = select the binding carrier    2. Submission Status = Completed    3. Click Finish 2. Right click the Master Submission and select **Update Stage to Entered/Submitted**      * + Click Finish   ***The Steps above must be done to Generate an EPIC Proposal***   1. Right click the submission and select **Create Carrier Response**    * Description = Quoted / Bound    * Date Received = current date    * Carrier Response = Quote    * Enter Response Line Premium, carrier commission rate and click Calculate    * Click Finish      * + On the popup, select Yes Perform Action and select **Move Marketed Lines to Current Policies**     ***Policies Tab****:*   1. Select **Renew Existing Policy** 2. Enter Policy Line, Description, Effective & Expiration Dates 3. Update Stage to: Submitted or In Process if policy detail edits are needed 4. Select Contracted policy     ***Lines Tab:***   1. Select the line(s) needing to be added to the new policy, renewal, or existing policy 2. Select **Add to this policy** - Adds the line to the policy added under the Policies tab  * Keep in mind, the choices made here affect only the highlighted line * Use **Apply to All Lines** if the choices apply to all lines and not just the highlighted line.  1. Under the LINE tab, select Status = NEW; enter Issuing Co (writing co); enter carrier commission rate      1. Click the **SERVICING** tab – verify the employees in each servicing role      1. Click the PR/BR COMMISSIONS tab      * + Click the ADD button to add the producer who will be paid commission on this policy   + Producer Commission will default   + Production credit should be 100%  1. When finished, click **MOVE**  * Update Submission status to Completed; click Finish  1. **BND1** Activity – Bind Policy via Master Marketing    * Leave open for receipt of policy    * Add Notes 2. Change Policy view from MARKETED to CURRENT |

### Policy Received from Carrier

|  |
| --- |
| 1. Drag & Drop the policy dec to the **BND1** activityin the client’s account 2. Issue the Policy in Epic:    * Highlight the policy    * Click ACTIONS > Issue/Not Issue Policy and **Issue**    * Verify Policy #, Effective/Expiration Dates, and Policy Status (NEW)    * Click the **Close Open Activities** tab and close the open **BND1** activity as Successful and add final note    * Click FINISH |

## JA. 3 Marketing Module (Full Version)

### Add Master Marketing Submission

|  |
| --- |
| 1. Click **Policies** area from the left Navigation Panel of the Client’s account 2. Change policy view from **Current** to **Marketed**      1. Click the ADD button (+) 2. Enter a name for the Submission (Example: 23-24 Master Submission) 3. Enter required information (Source, Department & type of business) 4. Add policies to the submission by clicking the **ADD** button under Policies to Market 5. **Add Line:**    * Add new line – Used to market new policy    * Add existing line – Used to renewing/remarketing an existing policy 6. Click DETAIL 7. **AMMK** Activity  * Open if you need for Pre-Quoting documentation and follow up * Close if you already have a Pre-Renewal/Pre-Quoting activity  1. Click the **ATTACHMENTS** Tab and drag & drop all attachments to be included in the submission      1. Enter policy detail by clicking each line in the navigation panel and completing each of the screens to fill in detail in the ACORD apps (be sure to add detail to the Commercial AP/ACORD 125 first) 2. When finished, close Submission from the navigation panel (X) |

### Create Carrier Submission

|  |
| --- |
| 1. Right click on the appropriate Master Marketing Submission and select **Create Carrier Submission**    1. Enter Premium Payable (PPE), Carrier (CA) or Broker (BR) name.    2. Update Carrier Submission description (Ex: 24-25 Travelers Submission)    3. Submission Status: In-Progress    4. Check each line to submit to specific carrier    5. Enter the requested premium/commission (if desired)    6. Click the Attachments tab and uncheck attachments not needed for this carrier    7. Click the Add button to attach documents, if needed 2. Click **Add** to Add Multiple Carrier Specific Submissions and Repeat above steps. 3. Click **Finish** once all Carrier Submissions are created. |

### Submit to Carriers

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| --- |
| 1. Select the appropriate Master Marketing Submission 2. Click **ACTIONS** > **Submit to Carriers** 3. Click Continue 4. **One activity will be created per Carrier Submission** 5. Place a checkmark next to each carrier in which a submission should be sent 6. Highlight the first carrier and complete all tabs related to the selected carrier 7. Review attachments and ADD additional attachments if needed 8. Distribution—select Print, Email or Fax and complete the details 9. Highlight the next carrier (if applicable) and complete all tabs as above 10. Preview if desired; Click **Finish** 11. Keep open **SCAS** activities and attach all carrier documents and correspondence during Marketing Process. |

### Create Carrier Response

|  |
| --- |
| 1. Select the appropriate Master Marketing Submission 2. Click **ACTIONS** > **Create Carrier Response** 3. Enter a Description for the Response (i.e., Quoted $1,000; declined due to claims, etc.) 4. Enter Date Received 5. Click the Dropdown for Carrier Response and select Decline, Not Received, or Quote. 6. If multiple lines were submitted and the carrier response applies to all lines, click “Apply to All Lines” in the gray bar, right 7. Click Detail 8. Update policy lines as needed 9. Close policy from the Navigation Panel (X) 10. If quoted, update stage: “Yes Perform Action” - choose **Update Stage to Entered** if still waiting on other carrier responses; **or Move Marketed Lines to Current** if the client has accepted carrier’s quote. |

### Attach Quote-Related Documents to SCAS Activity

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

### Bind/Accept Quote

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| 1. When a Carrier is selected for binding;   **For Binding Carrier(s);** Close **SCAS** as Successful and add final notes and documentation.  **For all Non-Binding Carriers;** Close **SCAS** activities as Unsuccessful and select reason from the dropdown list. Add notes and final documentation for why you’re not binding with each specific carrier, if applicable |

### Move Marketed Lines to Current Policies

|  |
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| 1. If “Move Marketed Lines to Current” was chosen in STEP 3, continue to the Policies tab (below); otherwise, highlight the submission being moved, and click **ACTIONS > Move Marketed Lines to Current**  * ***Policies Tab*:** * Select Add new Policy if this is a new policy/new business * Select Renew Existing Policy if creating the Marketing Submission from a Renewal * Select Update Existing Policy if adding policy lines to an existing policy. * Enter Policy Line, Description, Effective & Expiration Dates * Update Stage to: Submitted, Issued, or In Process * Select Prospective or Contracted policy * ***Lines Tab*:** * Select the lines to be added to the new policy, renewal, or existing policy * Select:   + Add to this policy - Adds the line to the policy added under the Policies tab   + Add to different policy   + Do not add to any policy * Keep in mind, the choices made here affect only the line highlighted. * Use Apply to All Lines if the choices apply to all lines and not just the highlighted line. * There are three opportunities to Apply to All Lines in this section * ***Attachments Tab*:**   + If Attachments were added to the Master Marketing Submission, they would show here.   + Check the attachments being moved with this Policy. * ***Activities Tab:*** * Any open activities existing for this Carrier Submission can be closed here.  1. When finished, click **MOVE** 2. Update Submission status to **Completed**; click Finish 3. **BND1** Activity—leave open to follow up on receipt of policy or confirmation of coverage; click Finish 4. Change Policy view from MARKETED to CURRENT |

## JA.4 Opportunities

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

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

### Creating a new Opportunity

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| **TIP:** If opportunity pertains to a new client, a new prospect must be created prior to creating the opportunity.  **TIP:** A Sales Manager and Sales Team needs to be created before they can set up a new opportunity. Send request to [support@acrisure.com](mailto:support@acrisure.com) |
| 1. Under client/prospect select **Opportunities** on the left navigation panel   A screenshot of a computer screen  Description automatically generated   1. To create a new opportunity, select the **+** to start.   A screenshot of a computer  Description automatically generated   1. Complete sections of the **Opportunity Detail.** Remember RED sections are required fields    1. Select whether the Opportunity is New or Renewal    2. Type short description of what business you are trying to obtain    3. Enter target close date (salespeople will know what this means)   A screenshot of a computer  Description automatically generated   1. Add department to **Structure** section.   A screenshot of a computer  Description automatically generated   1. Complete **Estimated Value** section.    1. Make sure you fill in estimated **Revenue** since this is what pulls to your **Dashboard**, but other information may be entered   A screenshot of a computer  Description automatically generated   1. Choose your **Sales Team** and the **Owner** of the **Opportunity**. The Owner could be you as the salesperson, or it could be the producer if you are entering this information on behalf of the salesperson.   A screenshot of a computer  Description automatically generated   1. Complete **Stage Details** to show what stage you are in your Opportunity.    1. Choose your Stage Group if you have one created for your team. If not, you can use **Default Group**    2. The **Stage** identifies the opportunity’s position in the sales pipeline*.* It also updates the percent of probability for winning the Opportunity.   A screenshot of a computer  Description automatically generated   1. Use the **Comments** section to add any other information pertaining to this Opportunity. Click **Detail** when done.   A screenshot of a computer  Description automatically generated   1. An automatic AOP activity will be created and closed out Successful stating you added an opportunity 2. More information sections will appear on your left **Navigation Panel**.   A screen shot of a computer  Description automatically generated   1. In the **Detail/Summary** section, there is a **Categories** tab. You can add **Agency Defined Categories** for your Opportunity if desired.    1. Add Category but selecting the **+**   A screenshot of a computer  Description automatically generated   1. Under **Contact/Business Info**, you will addthe nameof the person at the client you are contacting about this Opportunity.    1. You will use the **+** button to add their information.   A screenshot of a computer  Description automatically generated   1. Under **Associated Items**, you can associate this Opportunity to a current **Marketing Submission,** **Policy**, or **Service**.    1. You will use the **+** button to add this information.   A screenshot of a computer  Description automatically generated   1. **Attachments** is where you will attach documentation about this Opportunity by using the **+** button.   A screenshot of a computer  Description automatically generated |

### Updating the Opportunity

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

### Working through the Dashboard

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| Your Home screen will show your own personal **Dashboard**. As a team manager, you will have the opportunity to look at each team members Dashboard  **TIP:** Double clicking on each graph will take you into more detail about that information. Dates and value can also be changed at the more detail view.  **TIP:** Graphs default to Revenue |
| A diagram of a business pipeline  Description automatically generated with medium confidence   * **Combined Sales**   + This shows up to 150 Days of new & renewal **Opportunities** and expiring policies you have. * **New Business YTD**   + Shows you your sales goal that was set and where you are with that sales goal. * **New Business Pipeline**   + This will show you what new business opportunities and where you are in the different sales stages. You may change your target date if needed. * **Renewal Pipeline**   + Shows your upcoming renewals and renewal **Opportunities.** * **Hit Ratio**   + This section will give you the Opportunities you have won and/or lost |

## JA. 5 EPIC Proofs of Insurance

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| * See [CSR24 Workflows](https://acrisure.sharepoint.com/sites/AcriWorld/Shared%20Documents/Forms/AllItems.aspx?FolderCTID=0x01200008AF4B3768355743A4CA96C4C3214460&id=%2Fsites%2FAcriWorld%2FShared%20Documents%2FEnterprise%5FSolutions%5FCenter%2FPlatforms%2FSouth%2FEpic%2C%20CSR24%2C%20%26%20Indio%20Resources%2FCSR24%20Workflows&viewid=f6de5ddd%2Dd0d1%2D4fcf%2Daf55%2D3160191957d5) for CSR24 Certificate issuance |

### Auto ID Cards

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| 1. Select Policy 2. ACTIONS > Issue Auto ID Card 3. Highlight the appropriate vehicle—make sure there’s a Y under the Issue Column or Click Select to Issue if not 4. Click the Distribution Tab 5. Select Contact (use magnifying glass to locate) 6. Select Via (Print, Email, Fax) and enter additional details 7. Click Finish—AUID Activity defaults closed |

### Evidence of Property Insurance

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

### Certificate Processing in Epic

#### Step 1: Add Master Certificate Template

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

#### Step 2: Add Certificate Holders

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

#### Step 3: Issue Certificate

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| 1. From the **Certificates** list view, select the appropriate **Master** and **Holder**      1. Click **ACTIONS > Issue Certificate** for multiple holders, or **Issue Single Holder** for one holder.      1. Enter a **Contact Name** (required) from the dropdown list 2. Click the **Organization Contact** tab to verify the agency’s address and contact information 3. Click the **Holder Distribution** tab    1. Uncheck the client under **Distribute To**    2. Check the Holder and click on the holder to highlight. The information showing beneath the Distribute To list pertains to the highlighted item.    3. Be sure there is a **scanned signature** defaulted. This is a required field.    4. Enter **Delivery Options**. If emailing, subject is a required field. The certificate delivery can also include a cc and bcc.    5. Click the **PREVIEW** button to preview the Certificate before sending.      * 1. Click Finish.  1. An Activity will default **CERT**. Click **Finish**. 2. A copy of the Certificate is attached automatically in the client’s Attachments. |

## JA. 6 DocuSign Integration

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