# DSC EB Renewal Process Model

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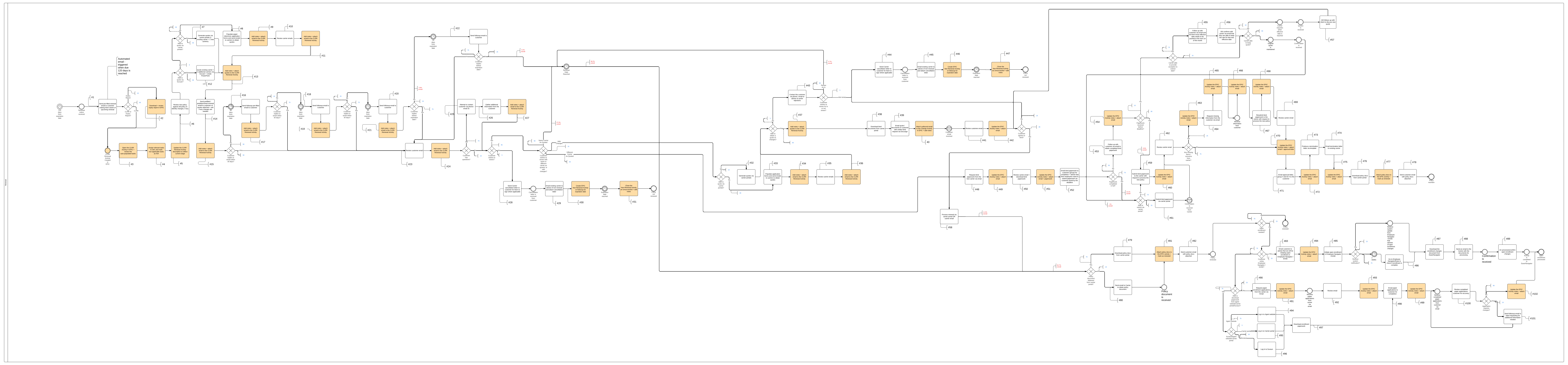
🟧 = EPIC Activity



120 days from expiration date
Renewal notice received
#1
Send pre-filled renewal email to customer making them aware of upcoming renewal
Automated email - triggered when due 120 days is reached
CLRR or Expiry Report?
Expiry Report
20
CLRR
80
Download + review expiry report in EPIC
#2
CLRR Renewal Activity Created in EPIC
Open the CLRR Activity in EPIC + review the auto-populated tasks
#3
Assign relevant tasks to self, and mark non-applicable tasks as N/A
#4
Update the CLRR Renewal Activity description to reflect current stage
#5
Review new policy against old policy to identify changes, if any
#6
Able to quote via Suvuan?
Yes
95
No
5
Quote existing carrier + 2 additional carriers via Suvuan + create PowerPoint
#12
Able to quote via carrier portals?
Yes
50
No
50
Generate quotes via carrier portals (1 existing carrier + 2 new carriers)
#7
Populate paper /electronic application forms and send emails to carriers to obtain quotes
#8
Add notes + attach email to the CLRR Renewal Activity
#9
Review carrier emails
#10
Add notes + attach email to the CLRR Renewal Activity
#11
Add notes + attach quotes to the CLRR Renewal Activity
#13
Send prefilled / predetermined renewal email to customer w/ quotes attached + ask if any changes are needed
#14
Add notes + attach email to the CLRR Renewal Activity
#15
Customer replies to email within 30 days?
90 days from expiration date
Send followup pre-filled email to customer
#16
Add notes + attach email to the CLRR Renewal Activity
#17
Customer replies to email within 30 days?
25
75
60 days from expiration date
Send followup email to customer
#18
Add notes + attach email to the CLRR Renewal Activity
#19
Customer replies to email within 30 days?
30 days from expiration date
Send followup email to customer
#20
Add notes + attach email to the CLRR Renewal Activity
#21
Customer replies before expiration date?
0.8% overall
15 days from expiration date
Send followup email to customer
#22
Customer replies before expiration date?
0.2% overall
Review customer email
#23
Add notes + attach email to the CLRR Renewal Activity
#24
Customer has questions?
Attempt to contact customer via phone / email 3x
#25
Gather additional information from the customer
#26
Add notes + attach email to the CLRR Renewal Activity
#27
Customer wishes to renew?
95
5
Send Carrier cancellation letter to customer for them to sign where applicable
#28
Cancellation letter is received from customer
Email existing carrier to advise of non-renewal and attach cancellation letter
#29
Create EPIC Non-Renewal Activity w/ followup for expiration date
#30
Expiration date reached
Close the Non-Renewal Activity as Unsuccessful + add notes
#31
Policy not renewed
Customer wishes to renew with same or different carrier as quoted, or with changes?
Same Carrier As Quoted
With Changes
15
Different Carrier As Quoted
35
47.3% overall
Renewal Date Reached
48.2% overall
Able to quote via carrier portals?
10
90
Generate quotes via carrier portals
#32
Populate application forms and send emails to carriers to obtain quotes
#33
Add notes + attach email to the CLRR Renewal Activity
#34
Review carrier emails
#35
Add notes + attach email to the CLRR Renewal Activity
#36
Able to obtain a quote w/ changes?
Add notes + attach quotes to the CLRR Renewal Activity
#37
Contact the customer via phone / email to advise of carrier rejections
#43
Customer wishes to renew As Is or not renew?
Renew As Is
Not renew
0.7% overall
Send Carrier cancellation letter to customer for them to sign where applicable
#44
Cancellation letter is received from customer
Email existing carrier to advise of non-renewal and attach cancellation letter
#45
Create EPIC Non-Renewal Activity w/ followup for expiration date
#46
Expiration date reached
Close the Non-Renewal Acitvity as Unsuccessful + add notes
#47
Policy not renewed
Download bind documents from carrier portal
#38
Email quote / documents to customer with written bind request via Docusign
#39
Attach outbound email to the Change Activity in EPIC + add notes
40
Customer email received
Review customer email
#41
Update the EPIC Activity notes + attach email
#42
Customer agrees to bind?
Request bind paperwork from the new carrier via email
#48
Update the EPIC Activity notes + attach email
#49
Review carrier email + download bind paperwork
#50
Update the EPIC Activity notes + attach email + paperwork
#51
Email bind paperwork to customer (group) for completion + advise that their employees need to submit paperwork via customer portal by the deadline
#52
Paperwork completed in full?
30
70
Follow up with customer via email to obtain completed bind paperwork
#53
Update the EPIC Activity notes + attach email
#54
Paperwork received before deadline?
8.4% overall
23.2% overall
1% overall
Able to submit via carrier portal?
Submit bind paperwork to the carrier with request to process the new policy
#59
Update the EPIC Activity notes + attach email
#60
Submit bind paperwork via carrier portal
#61
Confirmation is received from Carrier
Review carrier email
#62
Any missing items / concerns from carrier?
Update the EPIC Activity notes + attach email
#63
Request missing information from the customer via email
#64
Update the EPIC Activity notes + attach email
#65
Receive information from customer
Update the EPIC Activity notes + attach email
#66
Resubmit bind paperwork to the carrier with request to process the new policy
#67
Update the EPIC Activity notes + attach email
#68
Review carrier email
#69
Carrier able to provide exception to extend date?
Follow up with customer via email and let them know effective date needs to be pushed to the next 1st of the month
#55
AM confirms with carrier via email that they are able to keep the rate for that new effective date
#56
Carrier able to keep quote?
Carrier requotes when effective date is reached
Quotes is received
AM follows up with client to discuss new quote
#57
Original quote is maintained
Confirmation is received
Update the EPIC Activity notes + attach email + approval letter
#70
Email approval letter, group # and ID # to the customer
#71
Update the EPIC Activity notes + attach email
#72
Produce a termination letter via template
#73
Email termination letter to existing carrier
#74
Update the EPIC Activity notes + attach email
#75
Download policy docs from carrier portal
#76
Attach policy docs to the EPIC activity + mark as renewed
#77
Send customer email with policy docs attached
#78
Policy rewritten
Process renewal via carrier portal OR carrier email
#58
11.5% overall
59.7% overall
Policy document obtained from carrier portal?
Download policy docs from carrier portal
#79
Send email to Carrier to obtain policy document
#80
Policy document is received
Attach policy docs to the EPIC activity + mark as renewed
#81
Send customer email with policy docs attached
#82
Policy renewed
Open enrollment needed?
Policy renewed
Customer using Employee Navigator / EASE?
Email customer to advise that we will be initiating open enrollment in Employee Navigator / EASE
#83
Update the EPIC Activity notes + attach email
#84
Initiate open enrollment in Employee Navigator / EASE
#85
Receive system notification?
2 weeks
Go to Employee Navigator/Ease to check if enrollment is complete
#86
Receive system update from Employee Navigator / EASE that advises of open enrollment changes
Download the enrollment changes document from Ease/Navigator
#87
Send an email to the Carrier with the documents for processing
#88
Confirmation is received
AC processes/confirm open enrollment changes
#89
Activity is completed in Ease/Navigator
Open enrollment processed
Able to download paperwork from agent website/carrier portal/Suvaun?
Request paper enrollment applications from the carrier via Email
#90
Update the EPIC Activity notes + attach email
#91
Receive paper applications from carrier via email
Review email
#92
Update the EPIC Activity notes + attach email
#93
Suvaun/Agent website/Carrier portal
Agent website
Carrier portal
Suvaun
Log in to Agent website
#94
Log in to Carrier portal
#95
Log in to Suvaun
#96
Download enrollment paperwork
#97
Email paper applications to customer for completion
#98
Update the EPIC Activity notes + attach email
#99
Receive completed paper applications from customer via email
Review completed paper applications customer for accuracy
#100
Application requires changes?
Send followup email to client requesting for additional information needed
#101
Update the EPIC Activity notes + attach email
#102
Yes
No