

New Business

Send commercial Application to the client to fill or if the request is urgent, ask information from client and fill the application

Send the application to the appropriate insurance companies

If company have any additional questions, provide the information

Receive the quote from the company

Email to client for review and signature

Create the account in EPIC

Send binding confirmation to the insurance company

Make manual binder and send to the client as the policy documents are awaited.

Collect the premium form client

Attach all correspondence with Client and companies in EPIC account

Once policy is received, add the policy in EPIC

Post new business transaction in EPIC

Attach the policy in EPIC

Email policy to client

Endorsement

Send email to company for endorsement

Make binder manually and send to the client

Once endorsement document received, add endorsement of Policy in EPIC

Transact the endorsement in EPIC

Collect payment/refund payment to the client

Email the endorsement document to the client

Cancellation :

Get clients signature on the cancellation form

Send the form to the insurance company by email

After receiving the cancellation document from the insurance company, cancel the

policy in EPIC policy shell

Post the cancellation transaction

Send the cancellation document to the client

Refund the money to the client

Inactive the account if there is no other active policy