



## Reference Guide

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## Section 1 – Introduction

21<sup>st</sup> Century is another division of Farmers. CSG will begin to take calls for them on Monday, February 25, 2013. The two types of calls are verification calls and are similar to Farmers Lienholder Verification calls.

In order to access 21<sup>st</sup> Century systems you must use Internet Explorer (not Chrome).

Please be prepared to complete a 21<sup>st</sup> Century Assessment after this presentation.

## Section 2 – Call Scenarios

### Call Scenario 1: Coverage Verification

21<sup>st</sup> Century's claims office does not have access to DRC so they may call to inquire about the status of a policy or to verify the coverage limits carried by a policy holder.

You may also receive calls from "Agero", the company that handles 21<sup>st</sup> Century. Roadside Assistance program will call to verify coverage to approve roadside help.

Obtain policy number from claims agent, no caller verification necessary as only calls from claims reps will be received.

**Note: All policies that are active have roadside assistance!**

### Call Scenario 2: Loss Payees / Lien Holder (Loans) and Additional Insured / Leasing Companies (Leased)

A Loss Payee / Lien holder or an Additional Insured / Leasing Company can call to:

- Verify the policy coverage
- Verify / change / add their address (if not listed)
- NOTE: If a Loss Payee / Lien holder or an Additional Insured / Leasing Company is listed on the policy, a different Loss Payee / Lien holder or Additional Insured / Leasing Company may **NOT** add themselves or change the address.
- We are unable to add a second finance company as a Loss Payee for a financed vehicle.

Loss Payees / Lien holders or Additional Insureds / Leasing Companies **DO NOT** have the authority to make any other changes to the policy. (**This includes adding / changing liability or physical damage coverage**)

- This includes adding the vehicle if it is not currently on the policy
- Under no circumstances should an employer be listed as a loss payee or an additional named insured.

### **LOSS PAYEE / ADDITIONAL INSURED CALLS TO VERIFY COVERAGE:**

- The VIN (Vehicle Identification Number) must be verified
  - To ensure appropriate vehicle is listed on the policy
- The Loss Payee / Additional Insured address must be verified
  - To ensure we are sending notification to the proper location

**NOTE:** 21st Policy numbers will be numeric and do not start with a certain digit. 21st Policy numbers are between 7 and 8 digits.

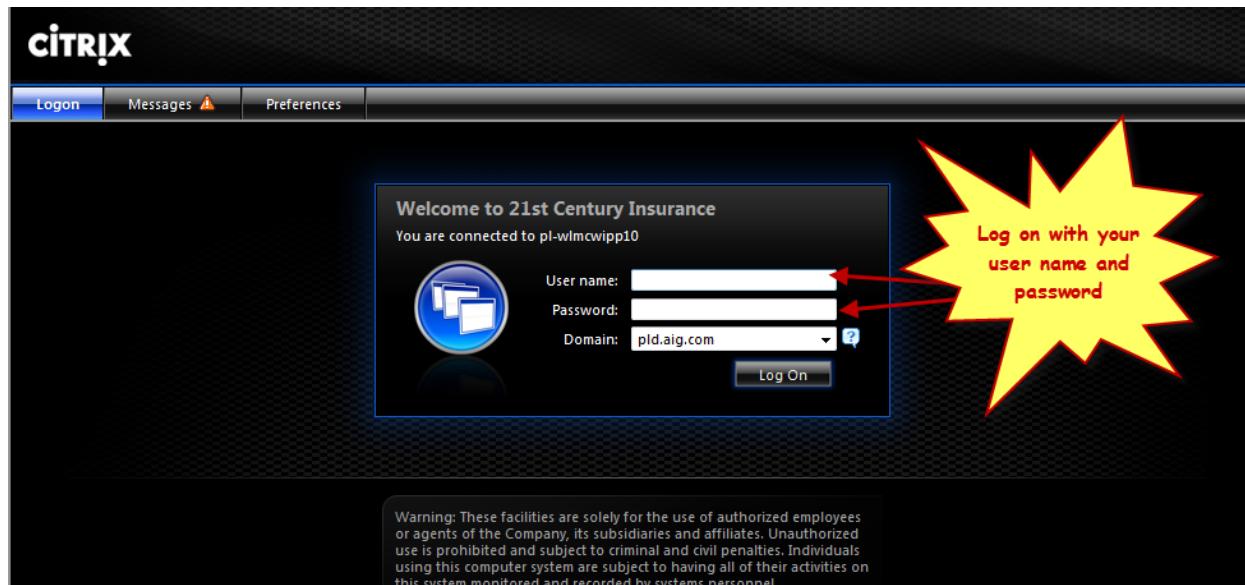
## Section 3 – Introduction to DRC (Navigation)

DRC stands for Decision Research Corporation (listed on the sign in screen).

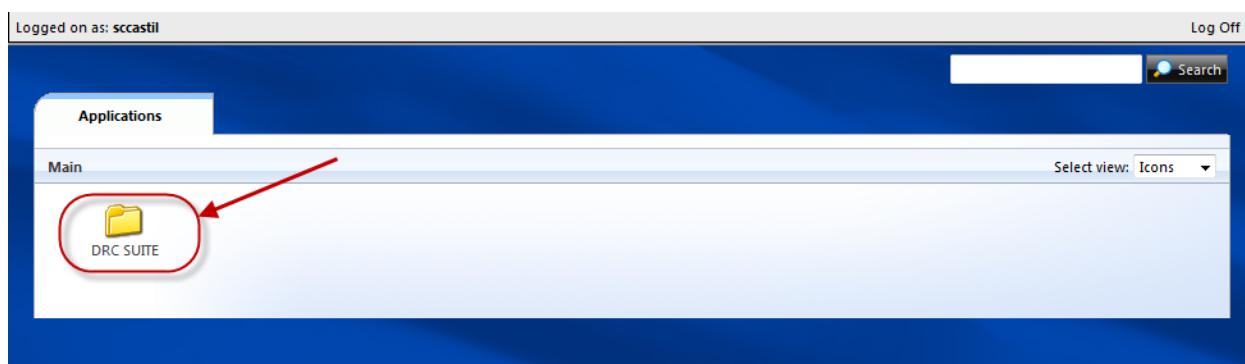
Steps for launching DRC. Go to the Web address:

<http://citrix21.pld.aig.com/Citrix/XenApp/auth/login.aspx>

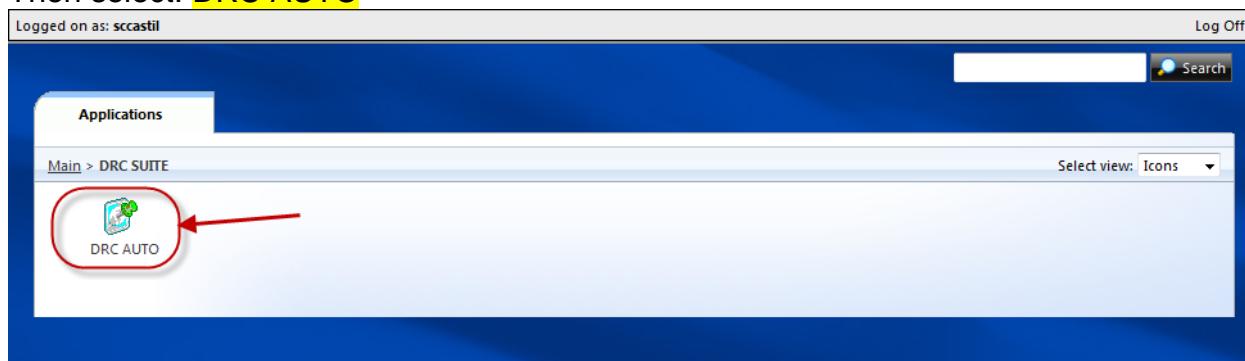
Log on using your User name and Password.



Once logged in select the folder labeled: **DRC SUITE**



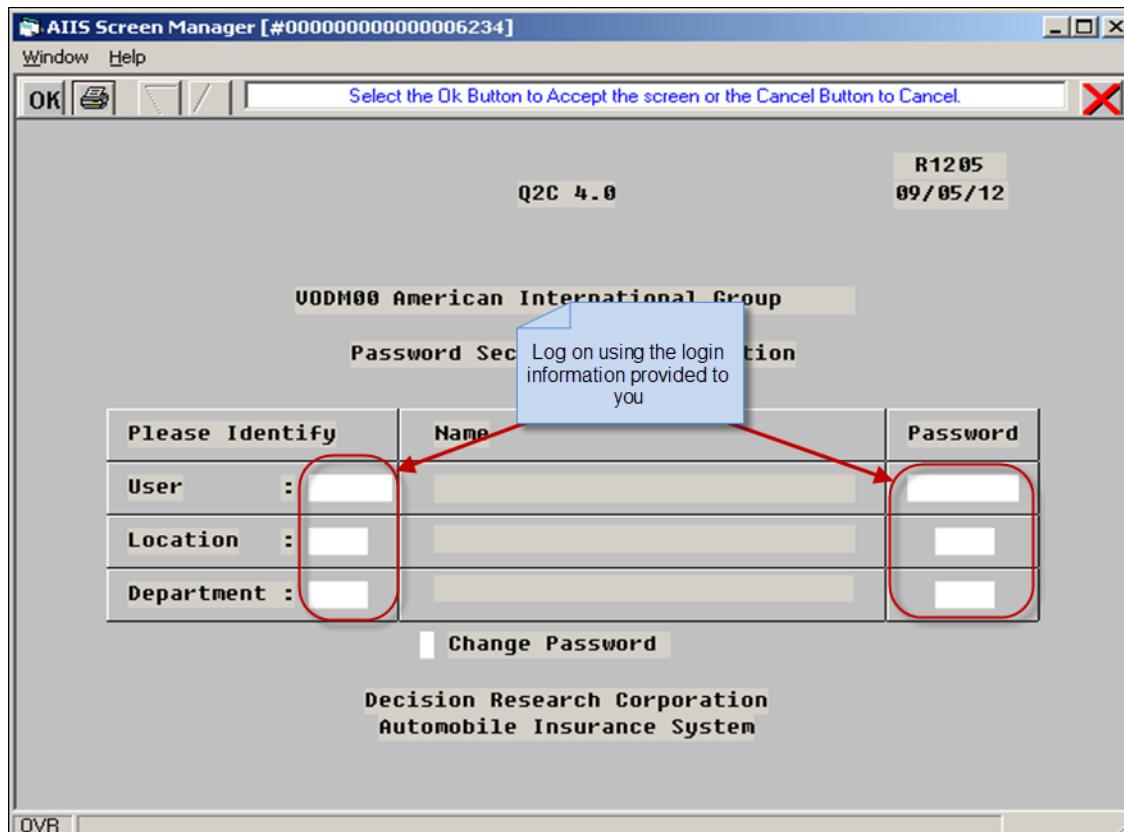
Then select: **DRC AUTO**



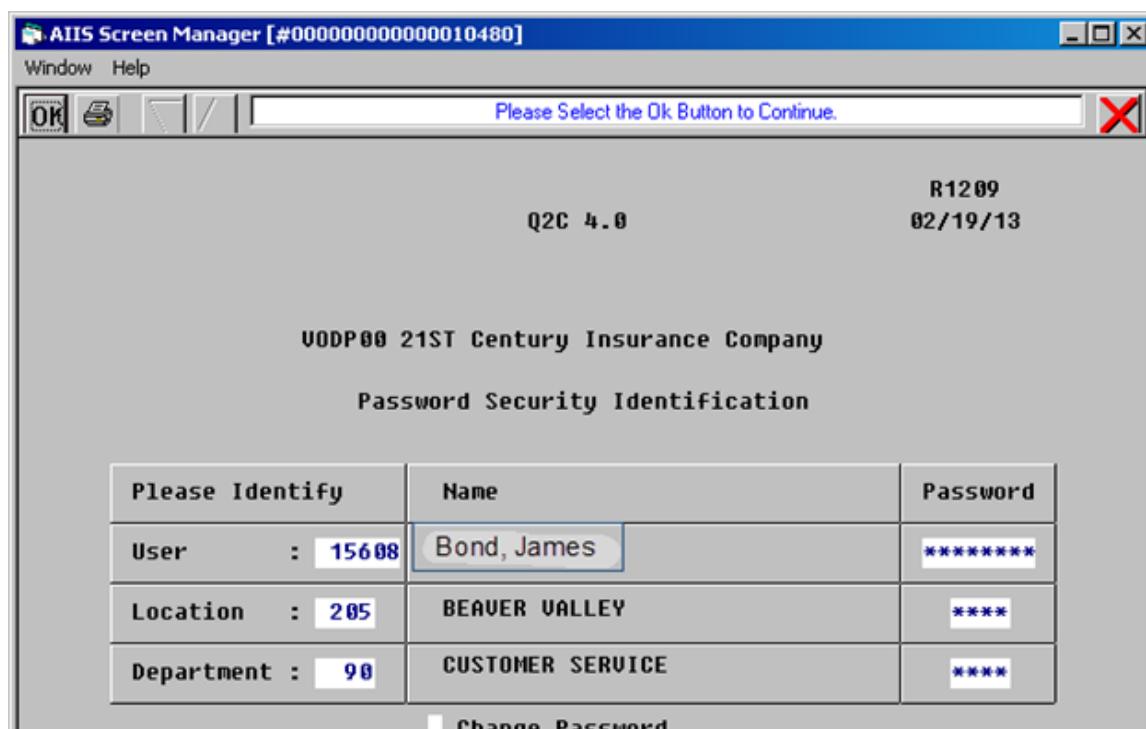
To log on, use the following information:

User: (5 digit number)  
Location: 205  
Department: 90

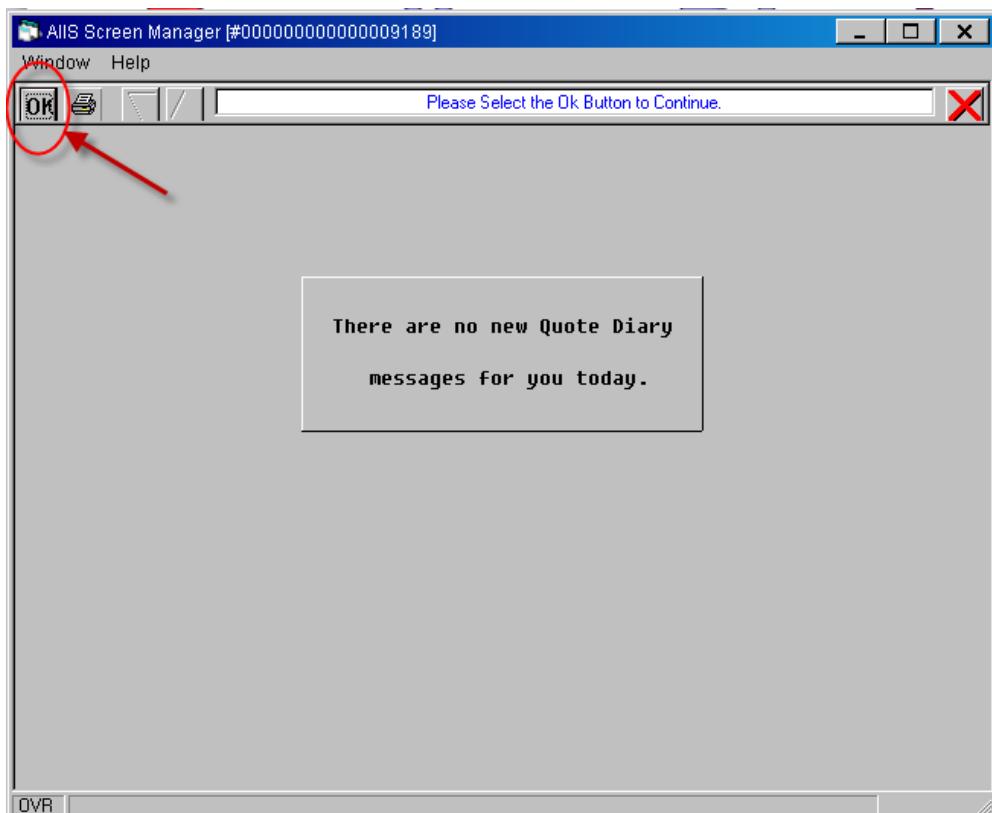
Password: Farmers1  
Password: chad  
Password: cust



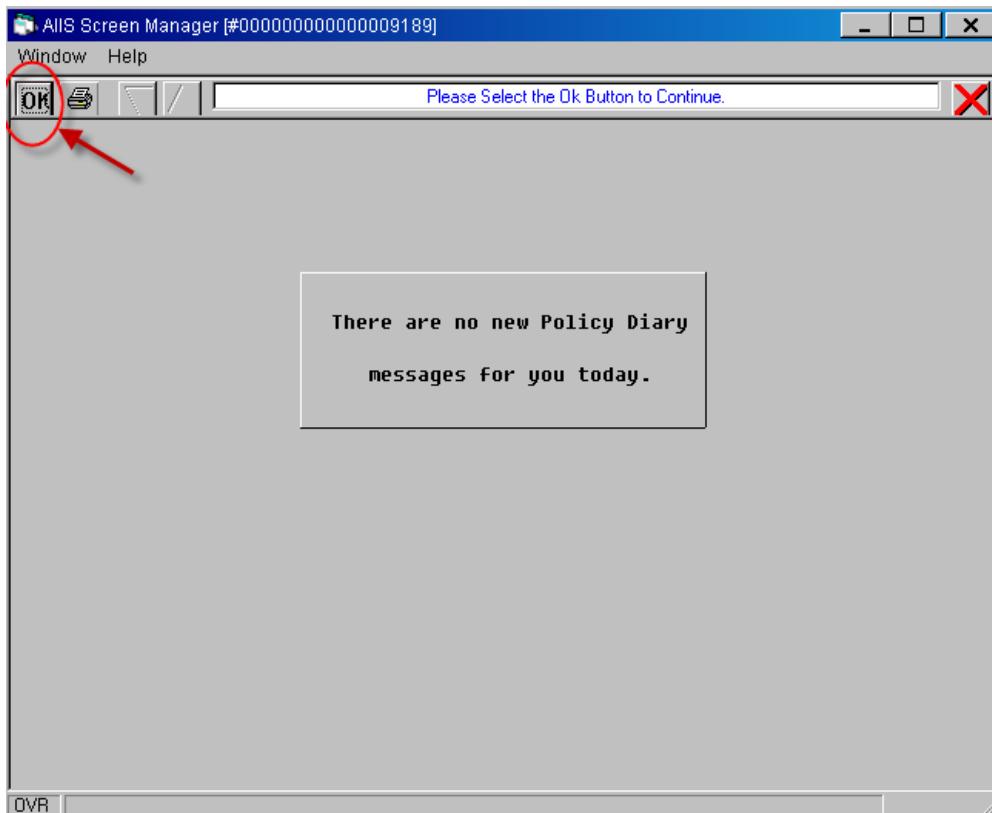
Once logged into DRC your information such as your name, location department should populated.



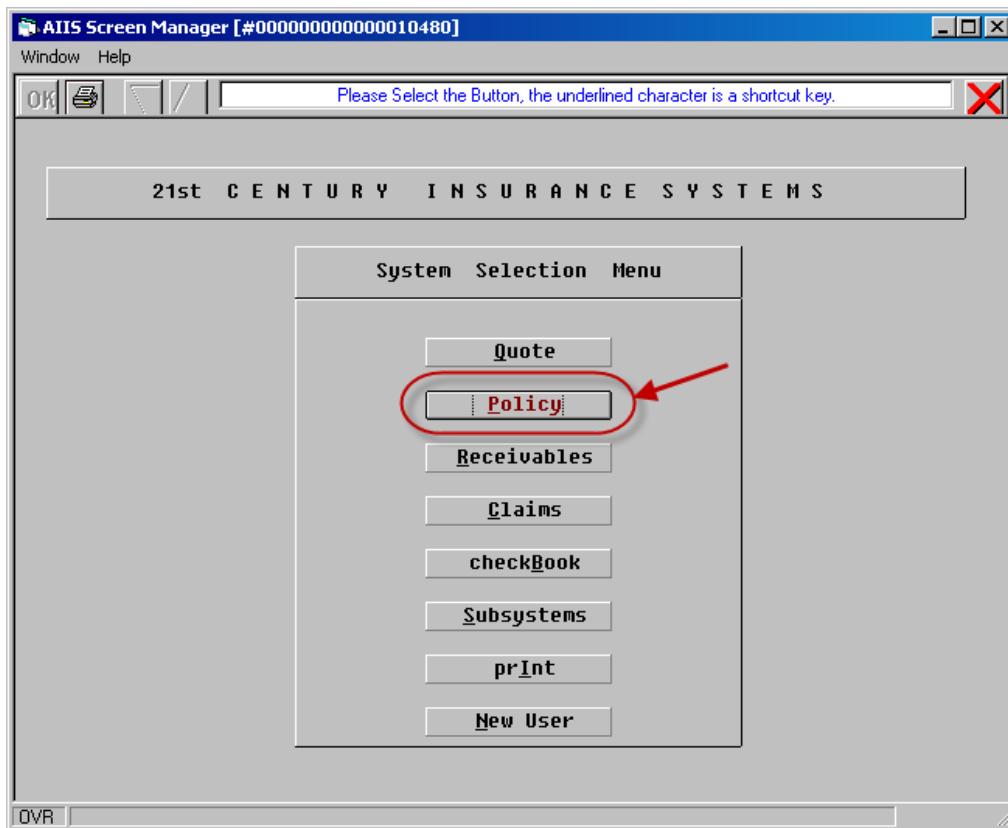
A message screen will pop up, please select “OK”.



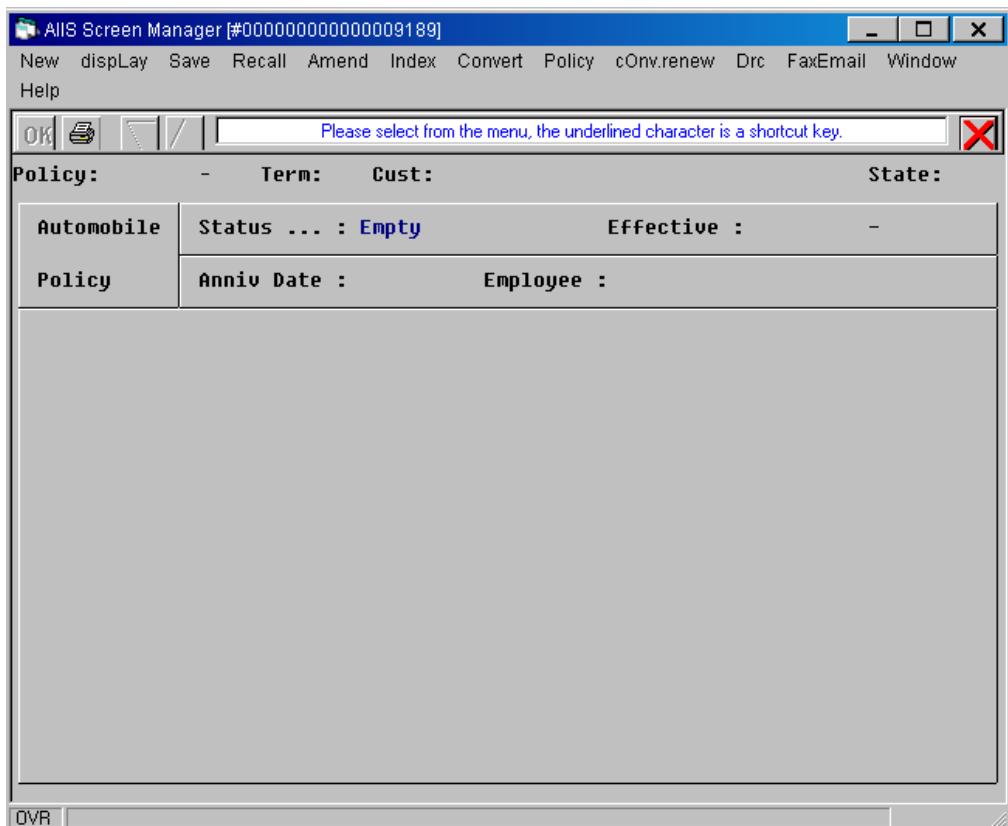
A message screen will pop up, please select “OK”.



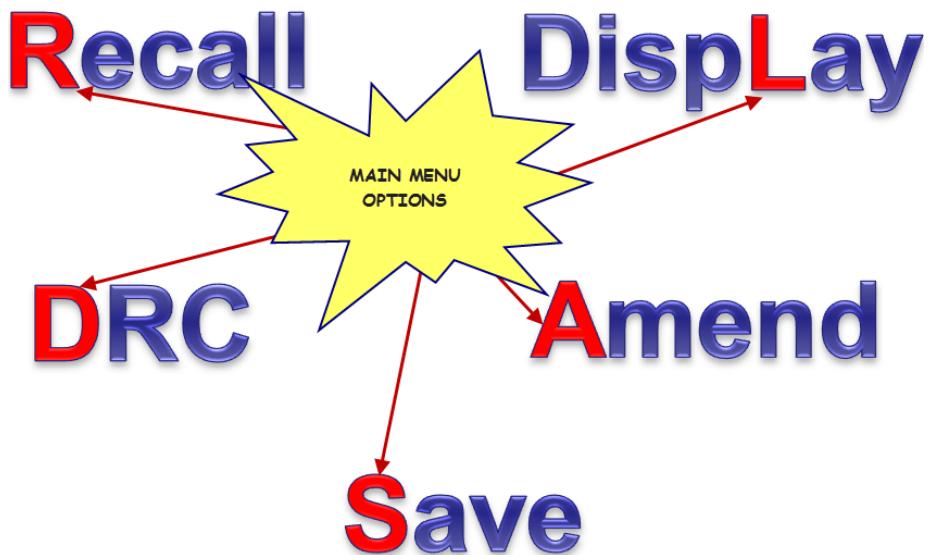
The next screen to appear will be the System Selection Menu. You will **ALWAYS** select **POLICY**.



Next Screen will be the “HOME SCREEN”. Notice you will not see any information for any customer everything will be grayed out.



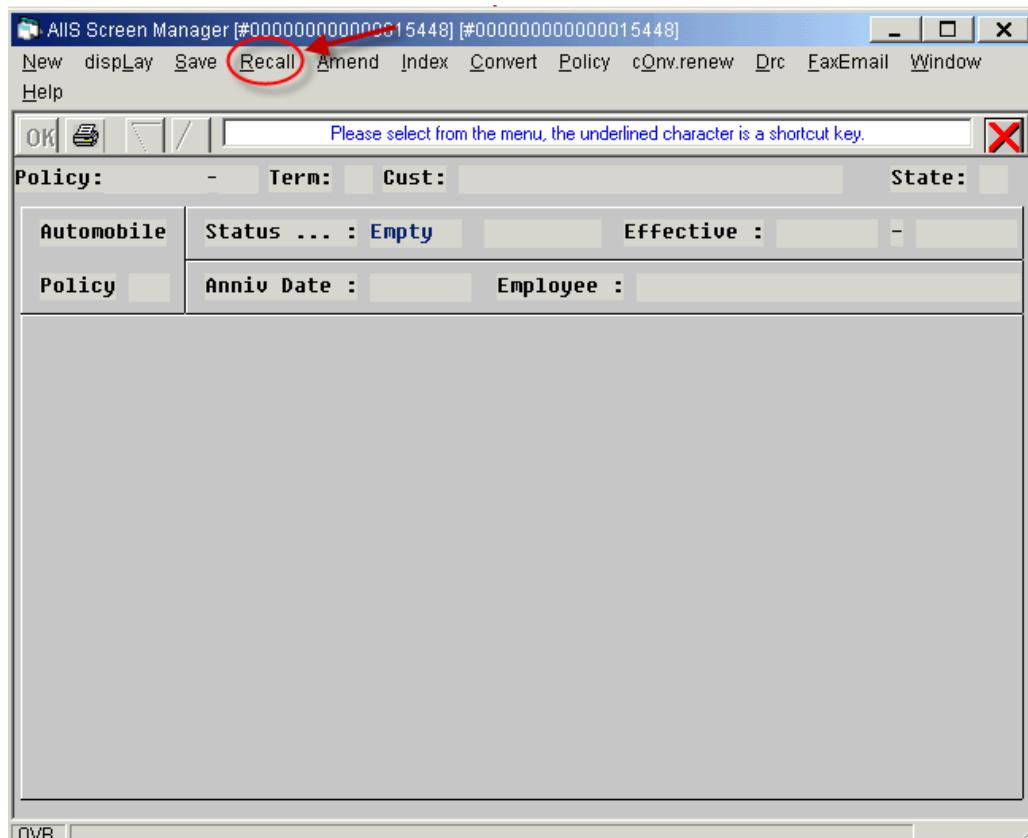
These are the menu options we are going to focus on today. Recall, Display, Amend, Save and DRC. Each of these menu options allow us to access different areas of DRC. Each one also has it's own hot key. Let's get started.



**Important Note about DRC:** You can select "OK" or "F1". Both are the same command.

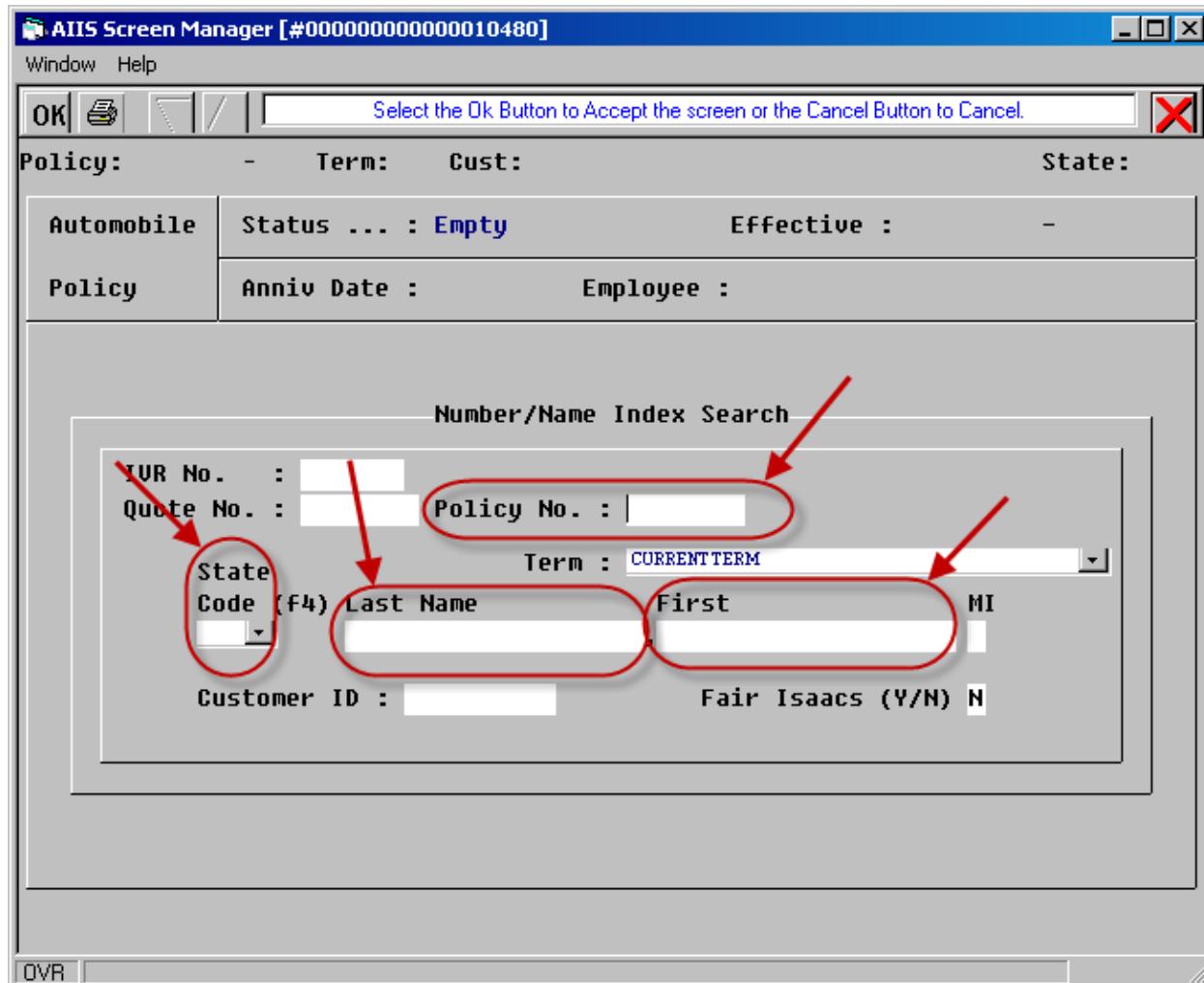
### RECALL:

In order to pull up a policy holder's information you will have to select the recall button.



This is the recall screen. It is a search matrix. Users can search by **either** policy number or state and name of the policy holder.

The best way is to search by Policy No. however, if the caller does not have a policy number you will have to search by state and first and last name of the policy holder.

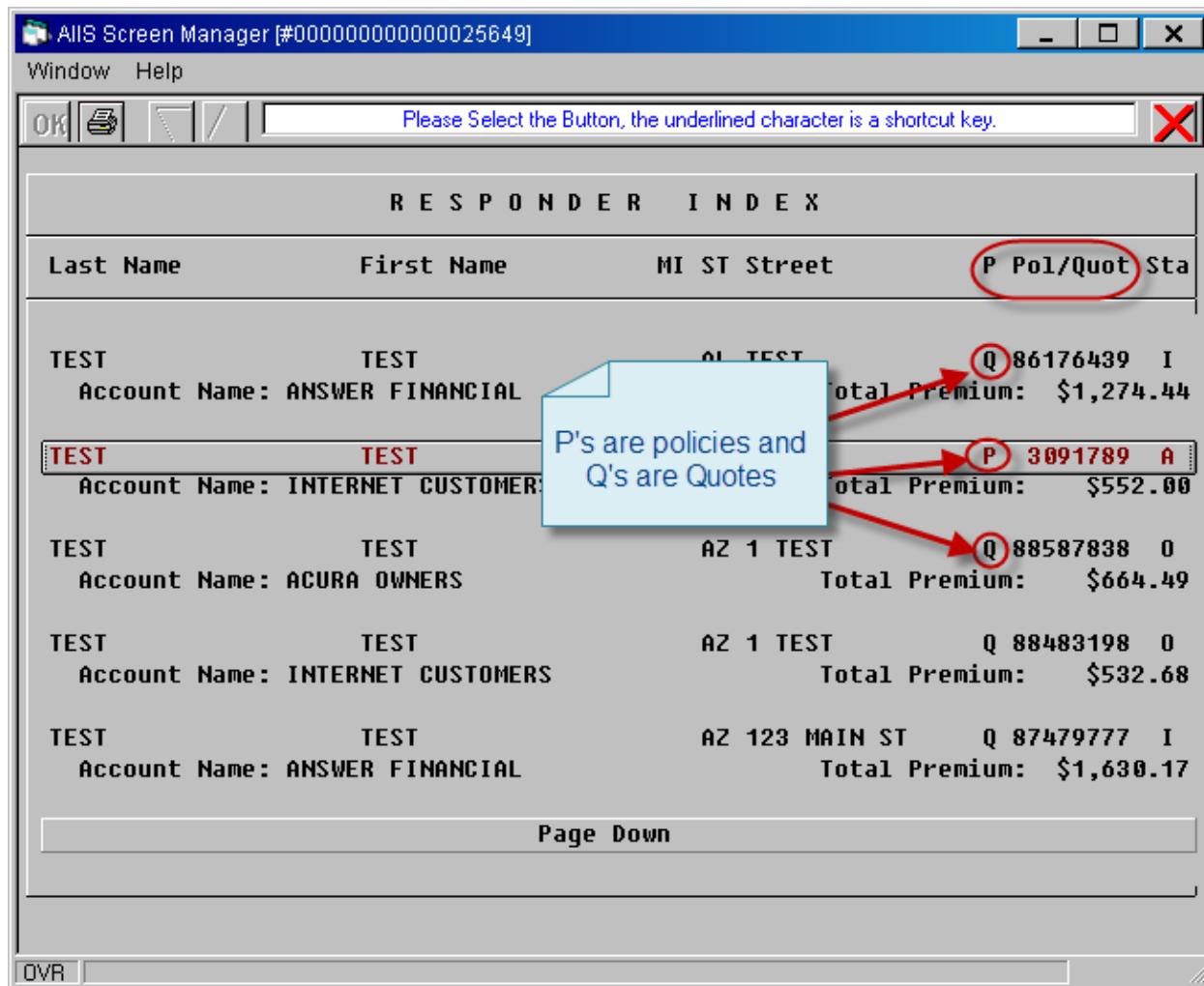


If searching by state and first and last name of the policy holder , after entering the state and name, a list of matching policy holders will appear. Use the page up/down key on the keyboard to scroll through pages.

Once the policy holder has been located use the arrow keys to select the policy holder. The **tab key** may also be used to select the policy holder.

If the customer has a common first and last name, **best results** will be achieved by using all three search options (state, last name and first name). If, however, the name is unique users may search by only the last name or last name and first initial.

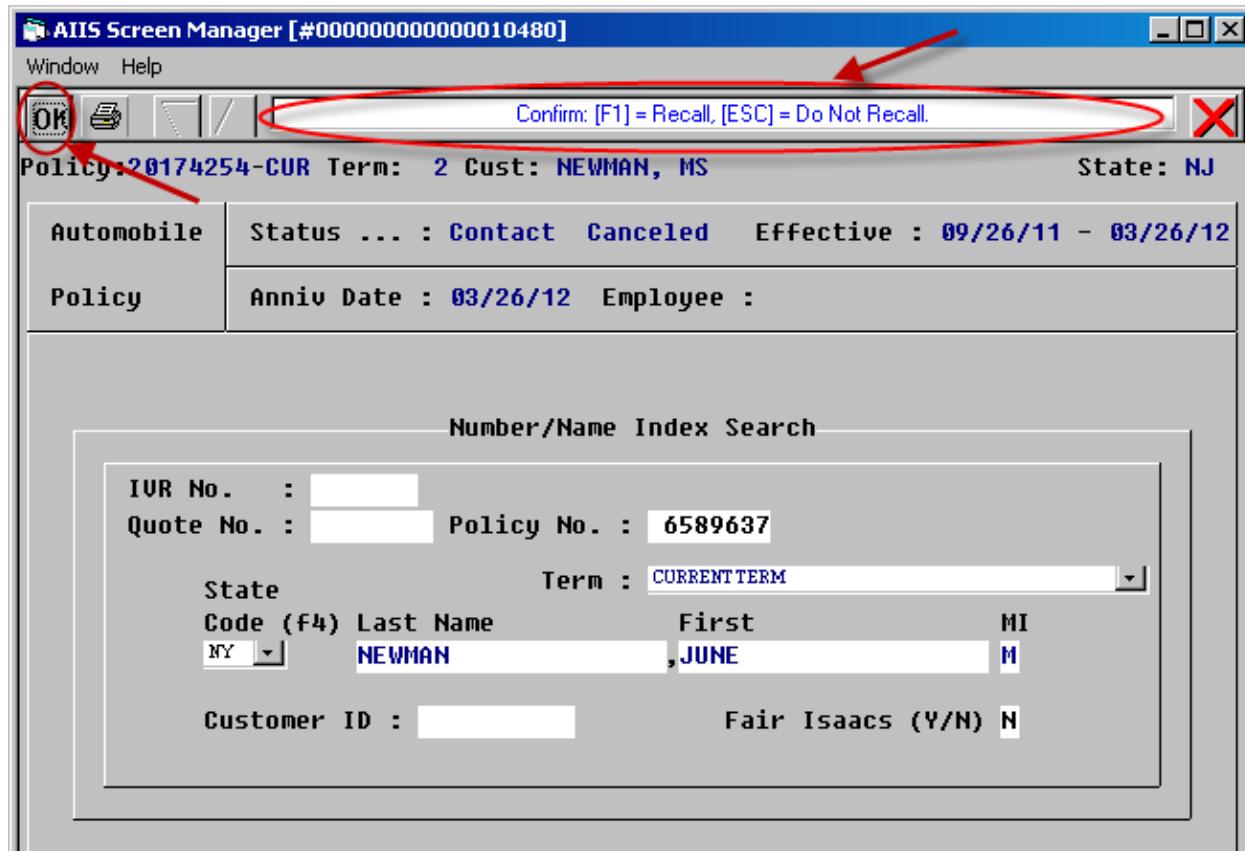
**Notice:** when searching for a policy by name you will only be able to select a few options. The reason is that some of the policies are quotes. If you notice the Q's and P's are circled to show you the different. We cannot pull a policy that is a Quote.



If searching by policy number, after entering the policy number, press the **F1 key** or select the “OK” button. This will populate the state and name of the policyholder.

If this is the name of the policyholder you are looking for, follow the instructions in the white bar (circled below in screenshot) and press the **F1 key** or select the “OK” button again.

If it is not, press Escape to search again, either by policy number or state and name.

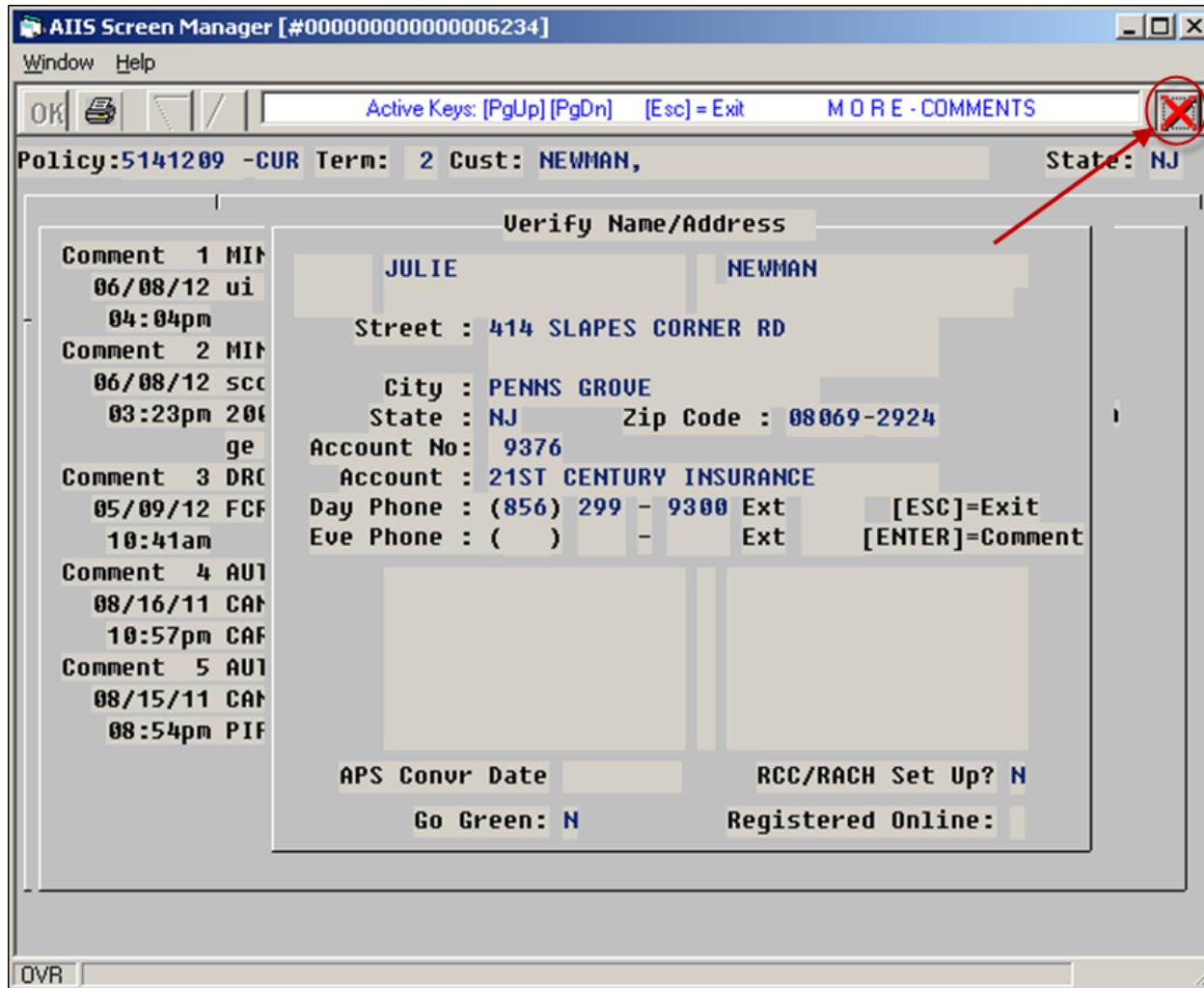


Once the policy has been recalled, a small Verify Name/Address screen will appear.

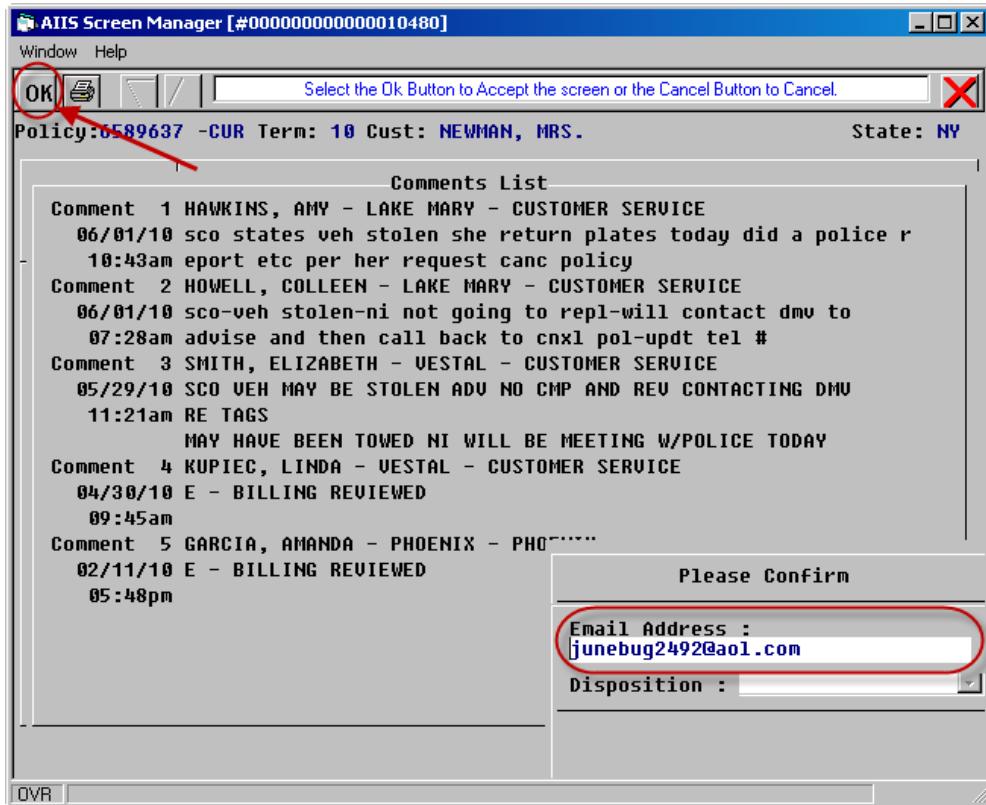
Ask the caller to provide the name and zip code.

Take note of the white bar across the top of DRC. **Also note that the “OK” button in the upper left is grayed out. This indicates that the F1 button is not an option.**

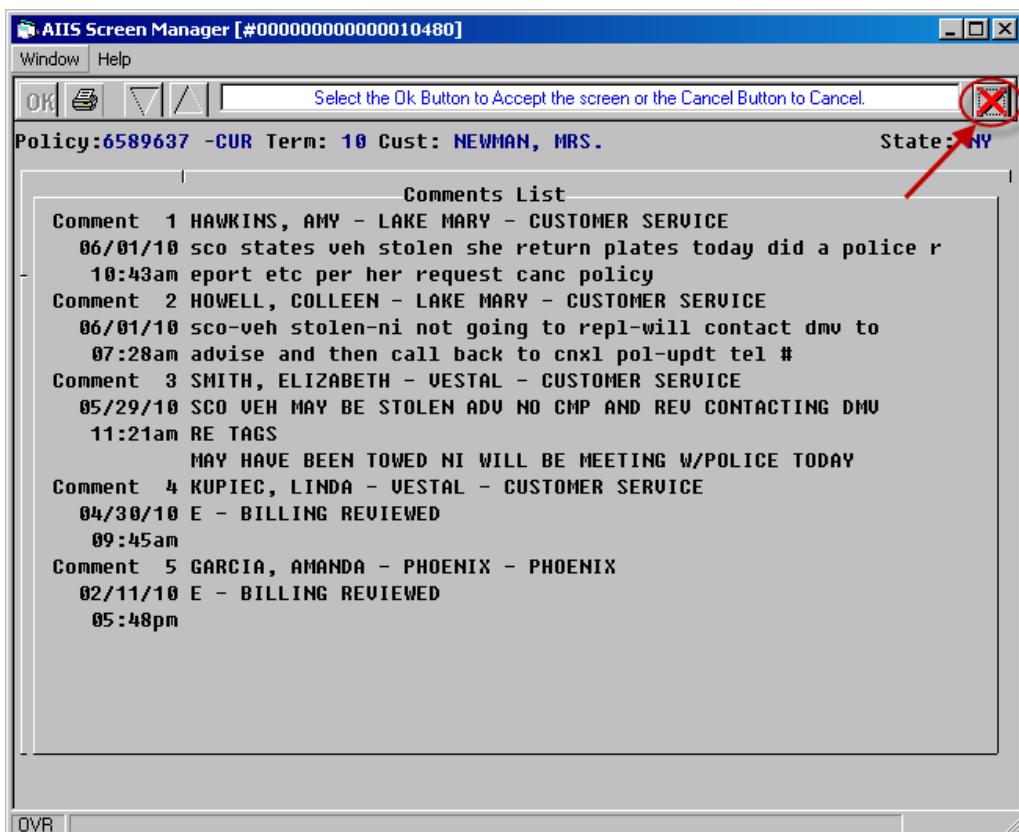
The X in the upper right is active. Once the policy holders information has been verified, **press the Escape button** on your keyboard to dismiss the Verify Name/Address screen.



If DRC displays an email address for the customer, press F1 or “OK” to dismiss.

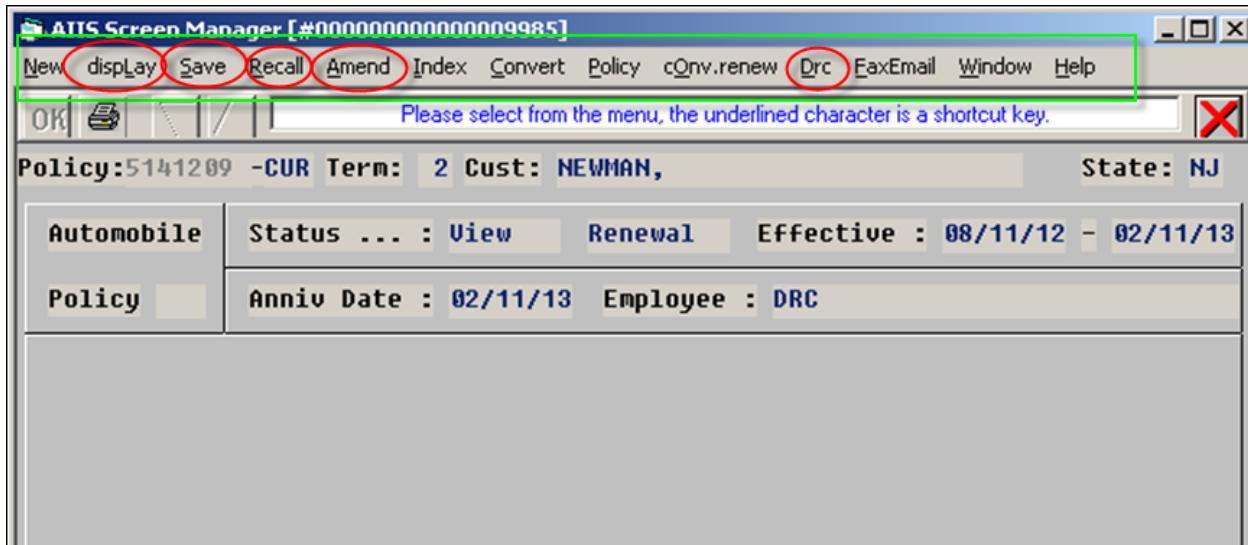


Once email screen is gone it will display all the comments on the policy. To exit comments hit escape or click the red “X”.



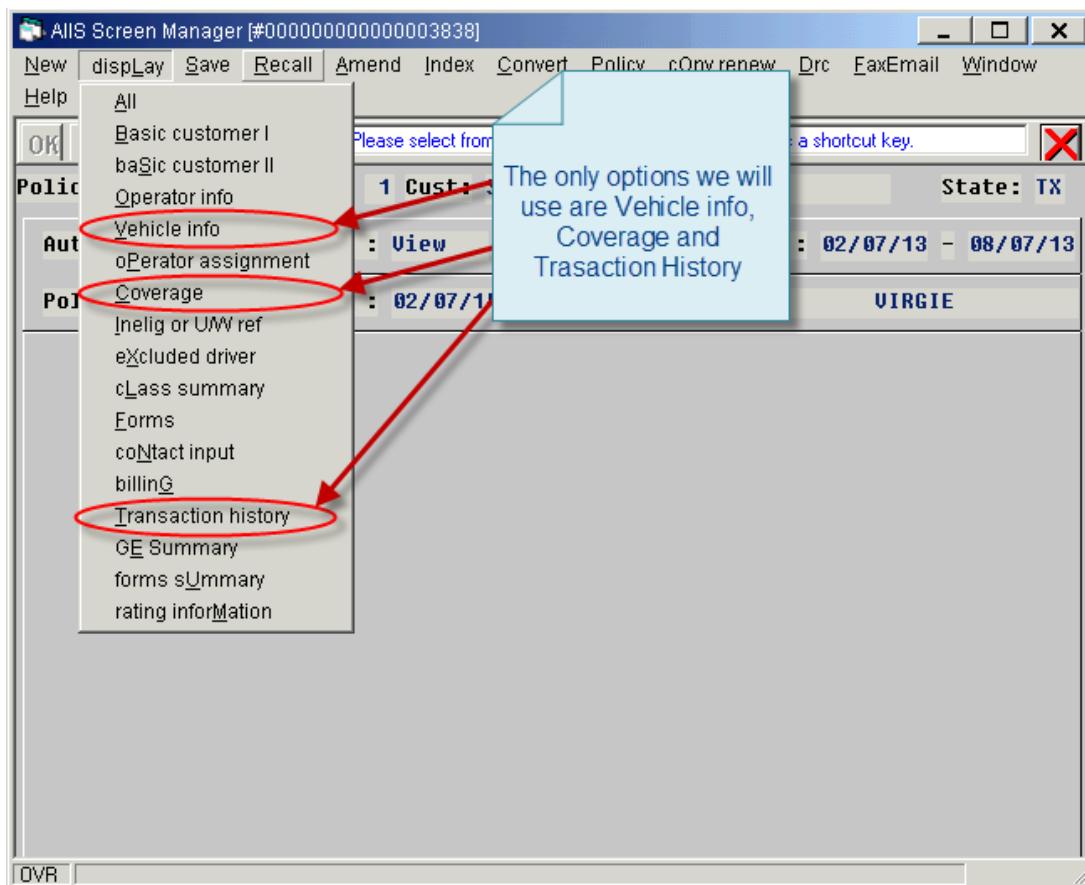
Once you navigate away from the comments screen, the horizontal policy menu options will reappear. From here we can select more options.

Reminder: CSG will only use Display, Save, Recall, Amend and DRC.



## DISPLAY:

The display menu will only show you information, it will not allow for you to change the information. Display is for “L”ooking only.

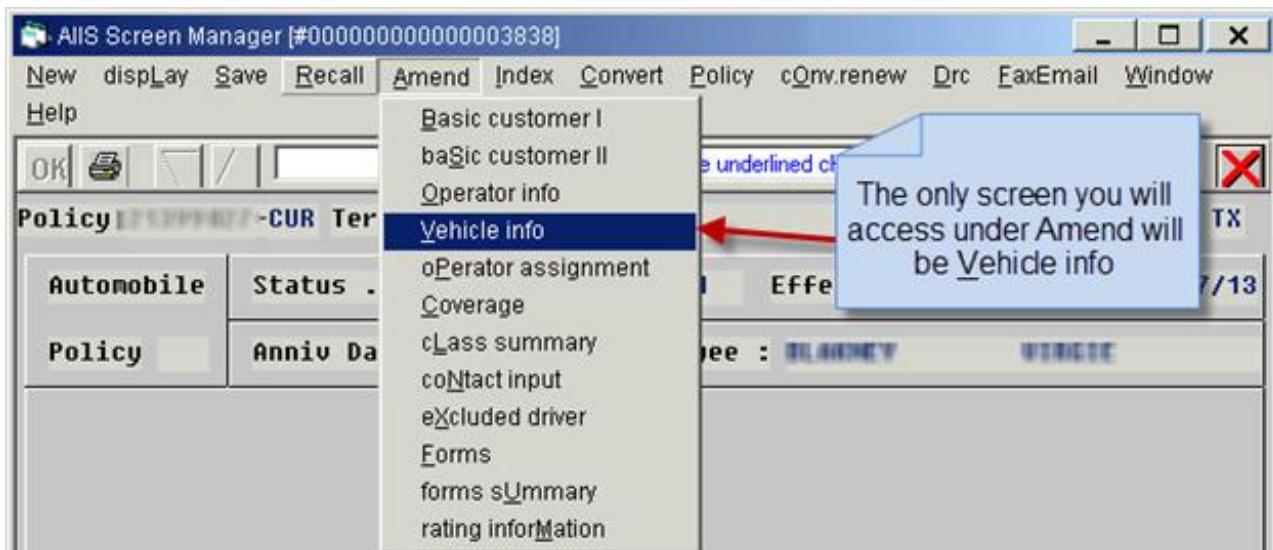


## **AMEND:**

The amend submenu will list several of the same screens as the display submenu. **There is one big difference between the two functions.**

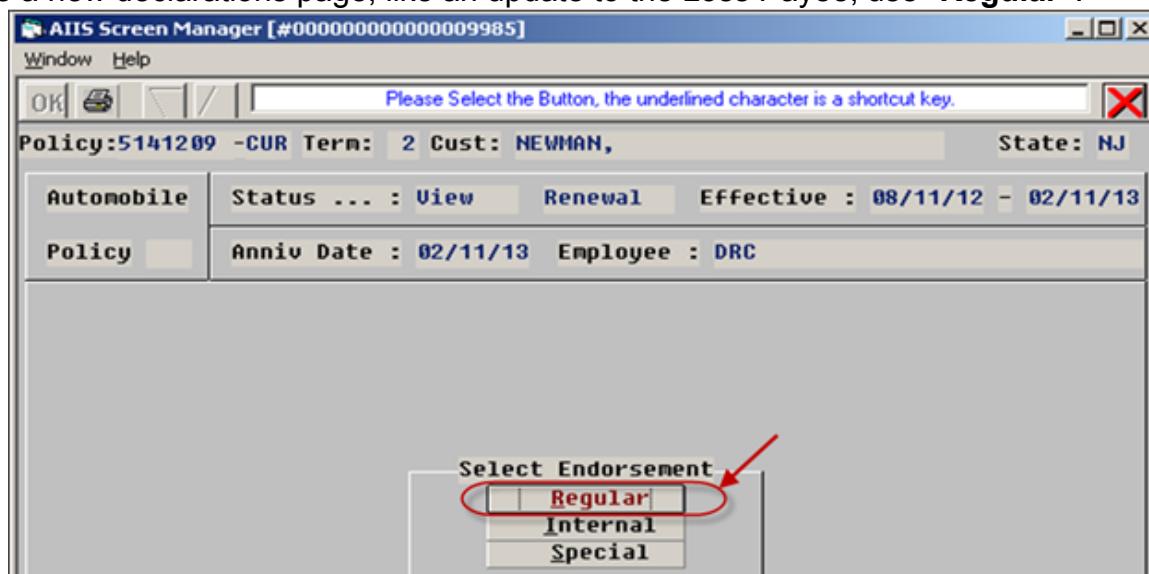
Remember that Display allows you to only look at information. **Amend will allow you to change or modify information.**

To access the Amend menu, press alt and then A. Notice the hot keys for the submenu options are the same as those for Display. To access the Vehicle screen, use V and for Coverage screen, use C.



Once you have selected Amend and selected the screen the system then asks what type of amendment you wish to make giving you 3 options.

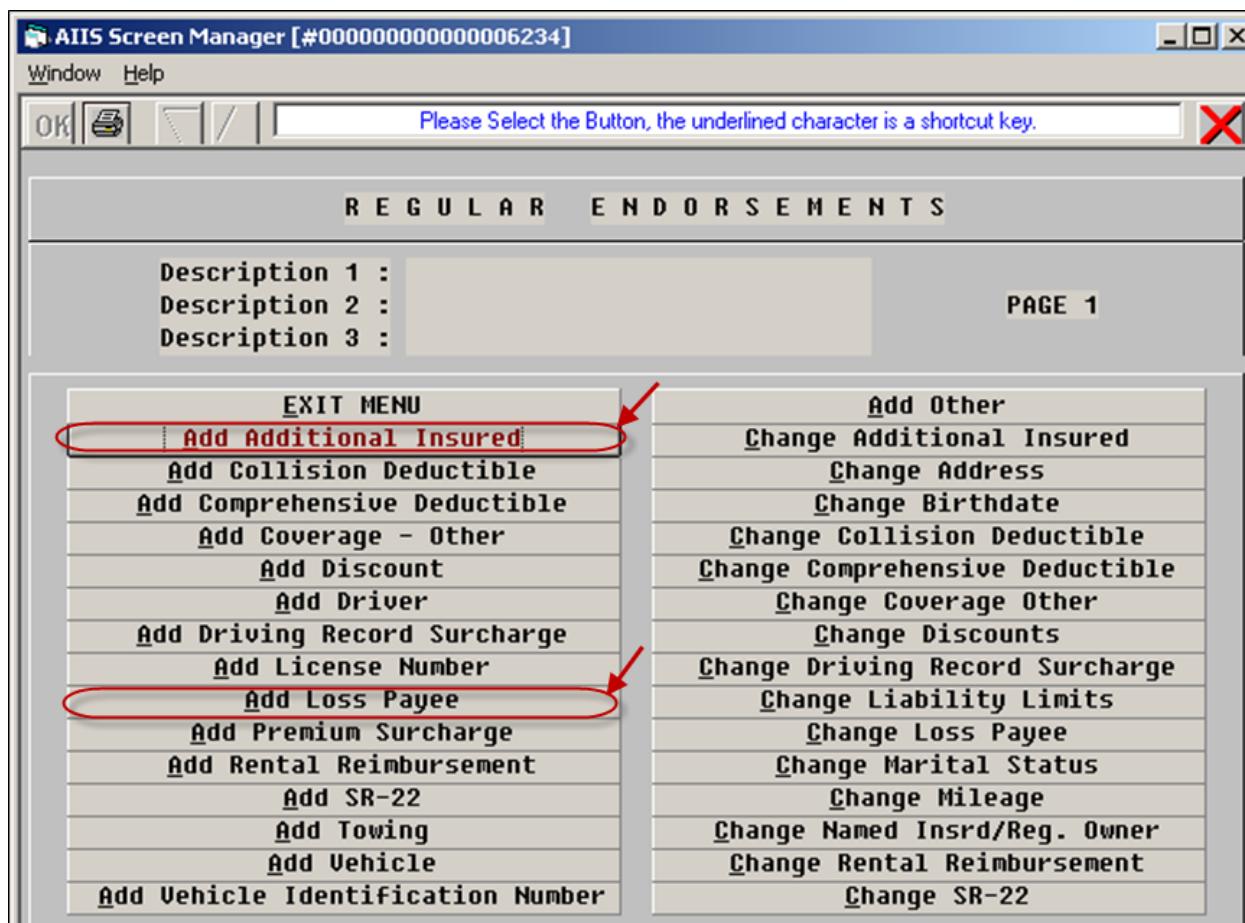
The type selected is determined by the change made to the policy. For policy changes which require a new declarations page, like an update to the Loss Payee, use "**Regular**".



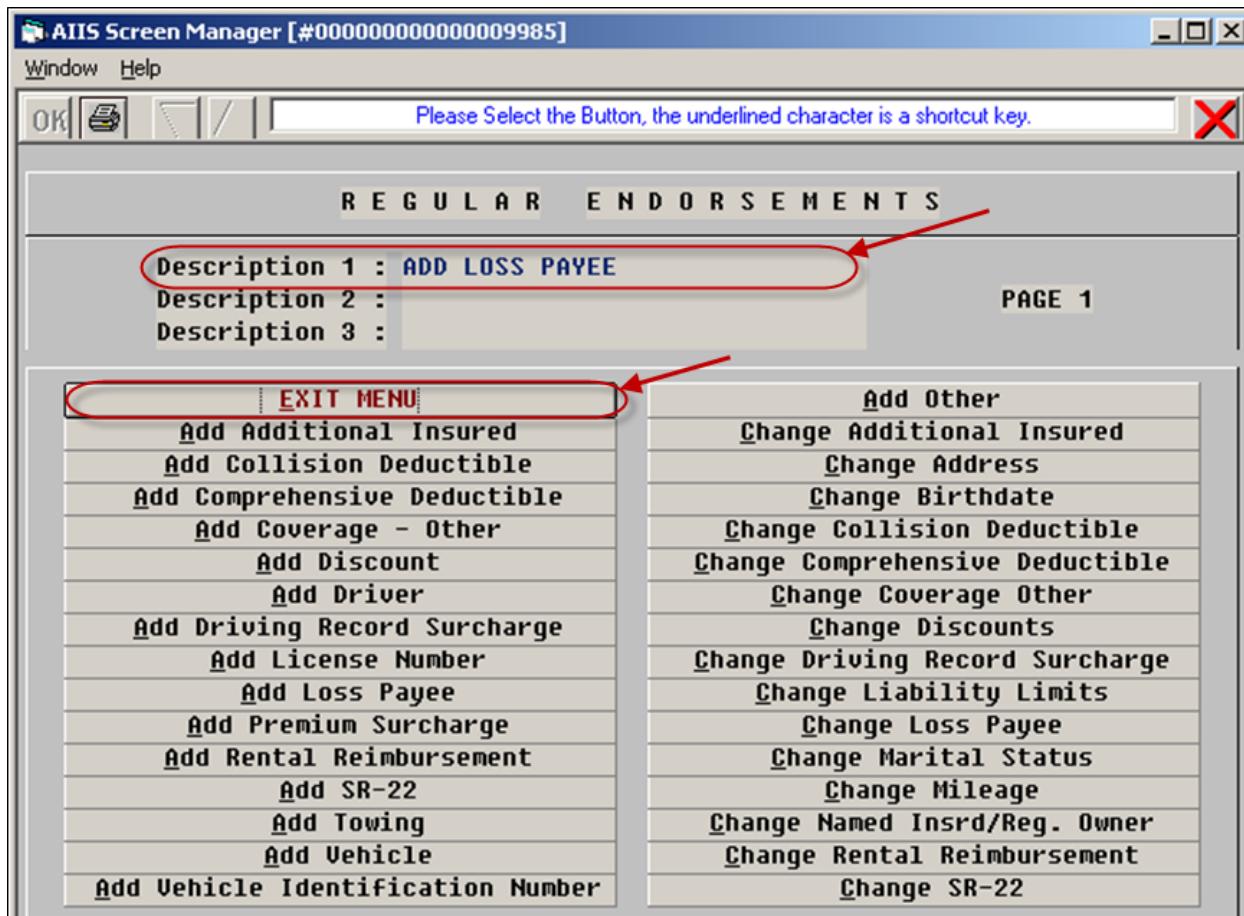
## SAVE:

If you have made changes to a policy that need to be kept, use the Save function. To access the Save menu, press alt and then S. DRC will prompt you to select what type of change you have made to the policy.

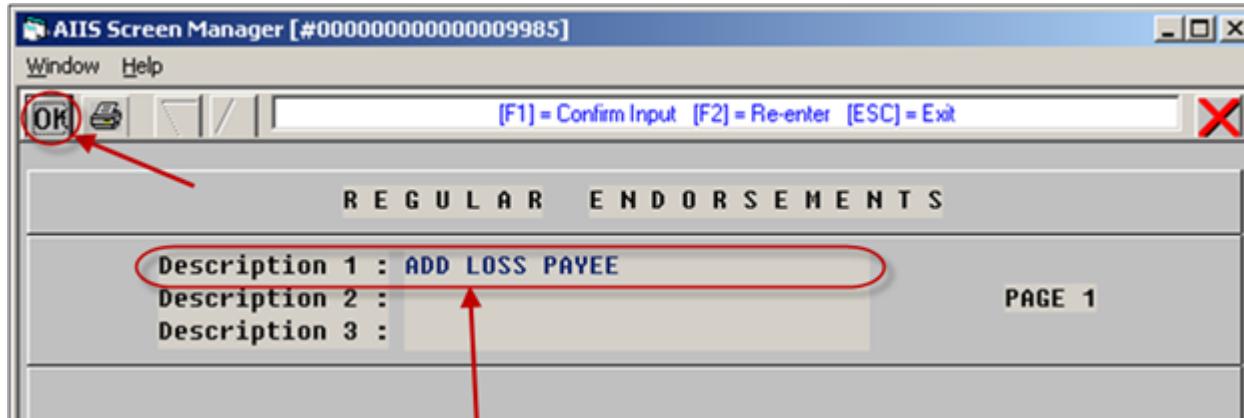
On this screen you can see two endorsements we will learn about in a moment, Add Additional Insured and Add Loss Payee. While this does not provide in depth explanation of the change, the type of change is indicated.



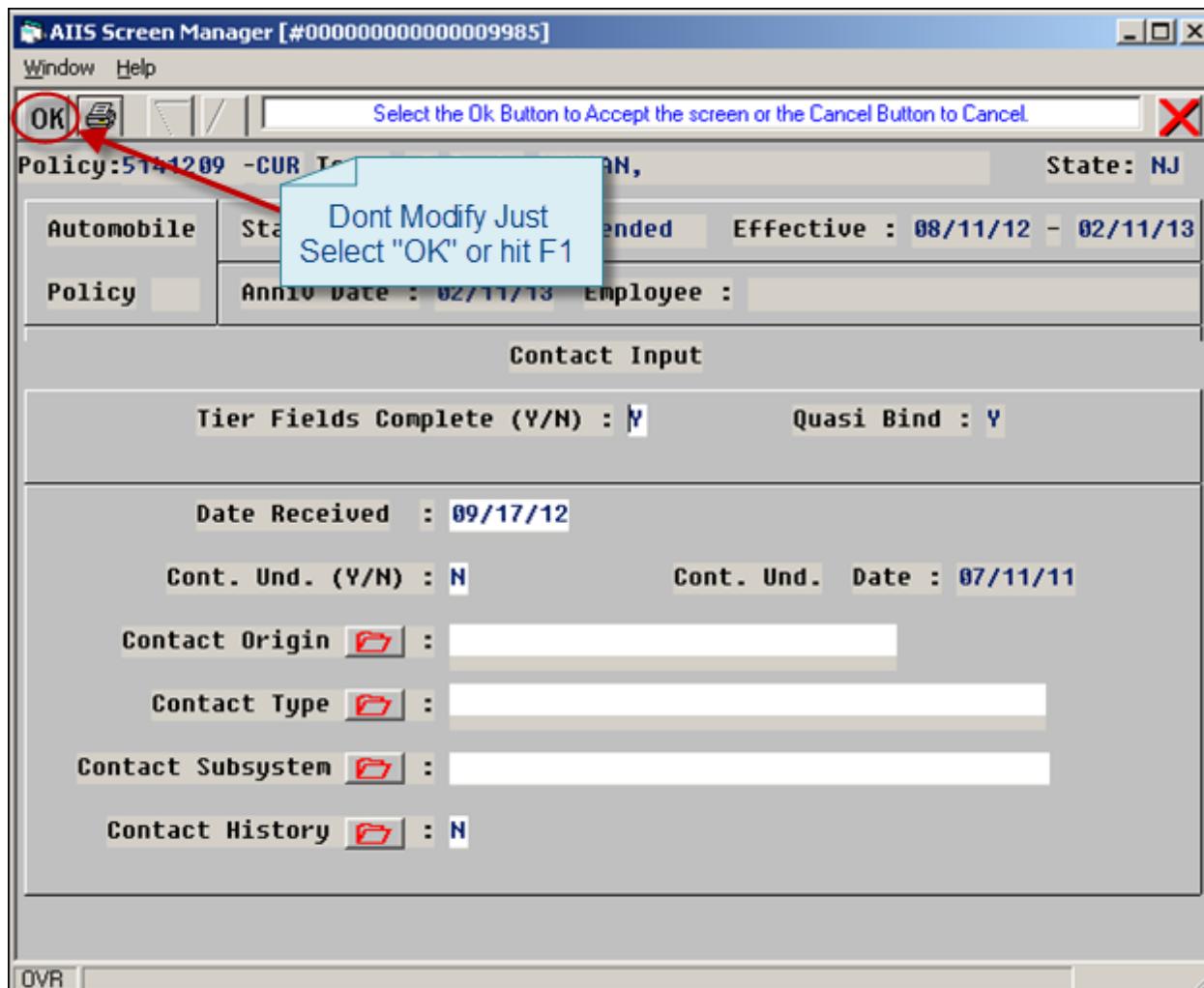
Once you have selected the description, it will appear at the top. DRC provides room for three descriptions. If only one is needed, select the desired one and then Exit Menu. You can use either the hot key for “**Exit Menu**”, or because it is highlighted the enter key may also be used.



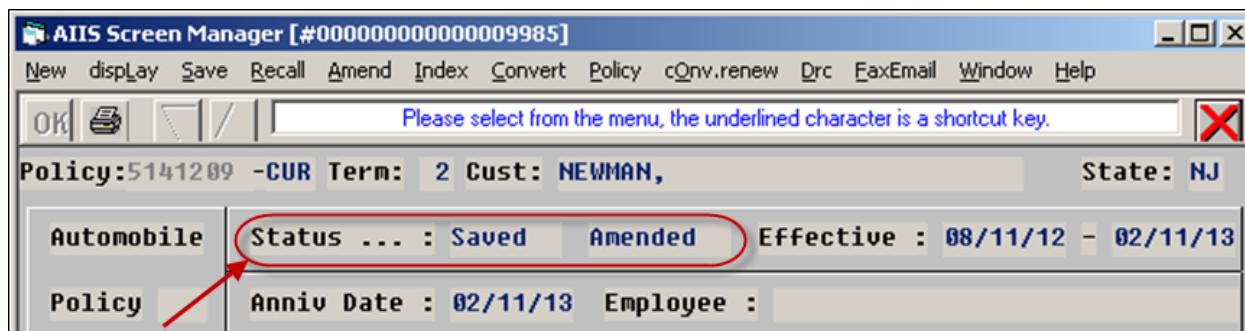
Once you have exited from the Regular Endorsement menu, DRC will ask you to verify your selection. Note the white bar at the top. If you have selected the endorsement you wanted, press the **F1 key** or select the “**OK**” button. If you accidentally selected the incorrect one, press F2 to return you to the Regular Endorsement menu. If you didn’t intend to save at all, press escape. Press **F1 key** or select the “**OK**” button to complete the save.



After pressing **F1** key or select the “**OK**” button to complete the save, DRC will display the Contact Input Screen. There is no need to modify this screen, just press the **F1** key or select the “**OK**” button to dismiss it.

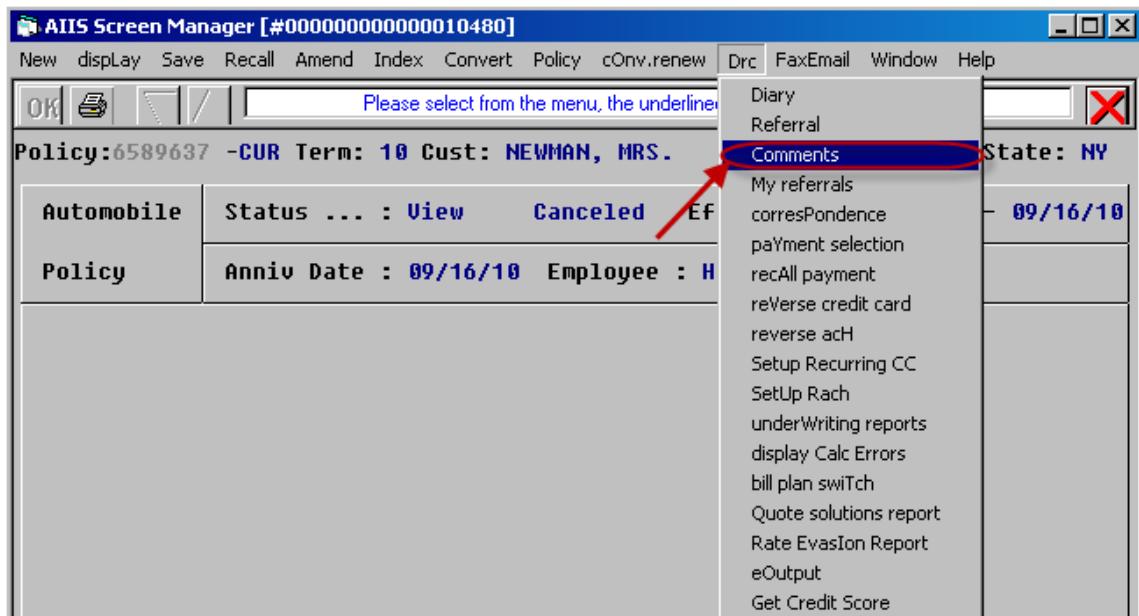


Once the save is complete, the user will be returned to the “home” screen. If you are not certain if you saved successfully, check the status of the policy. It is in the upper middle portion of the screen. Here you can see it reads “Saved”.

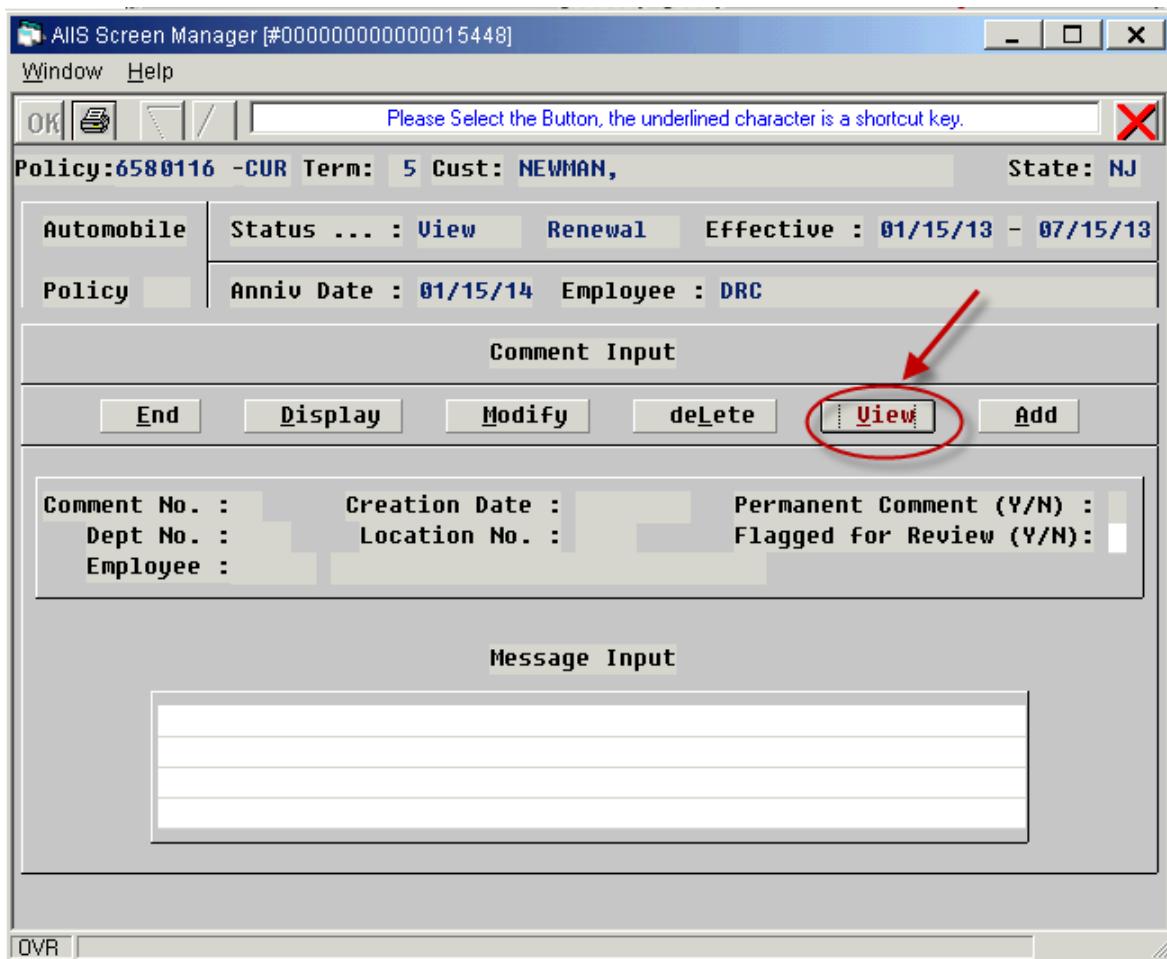


## DRC:

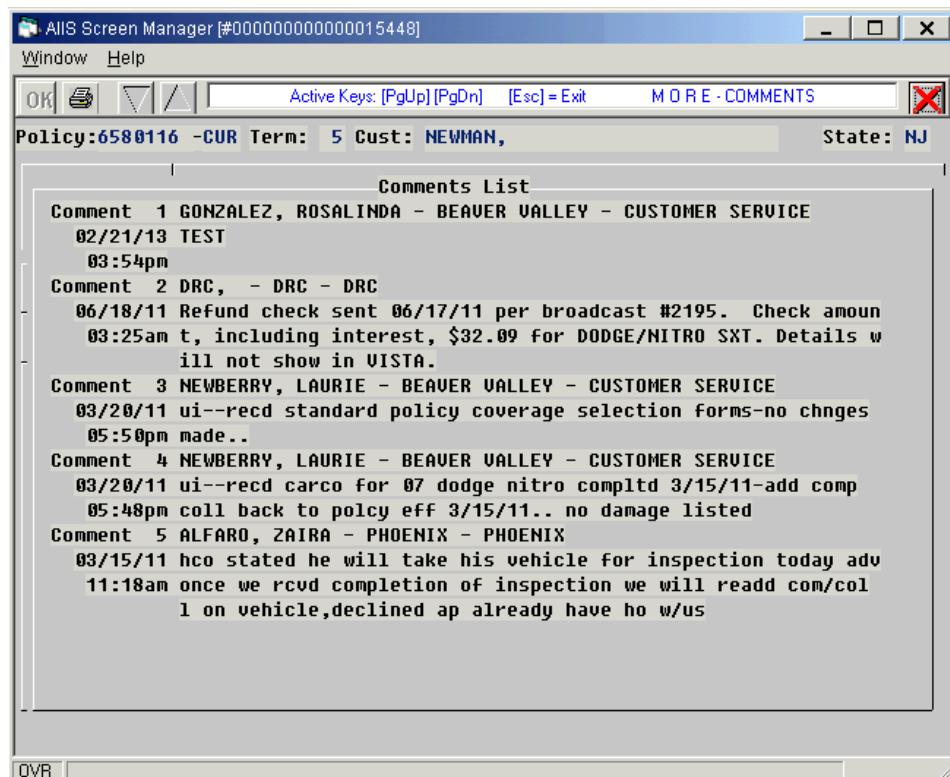
Now, let's look at our final option, DRC. Remember that after recalling a policy, DRC showed a list of comments left by previous reps. This ensures that all departments know what is taking place on each policy. You will need to leave a comment.



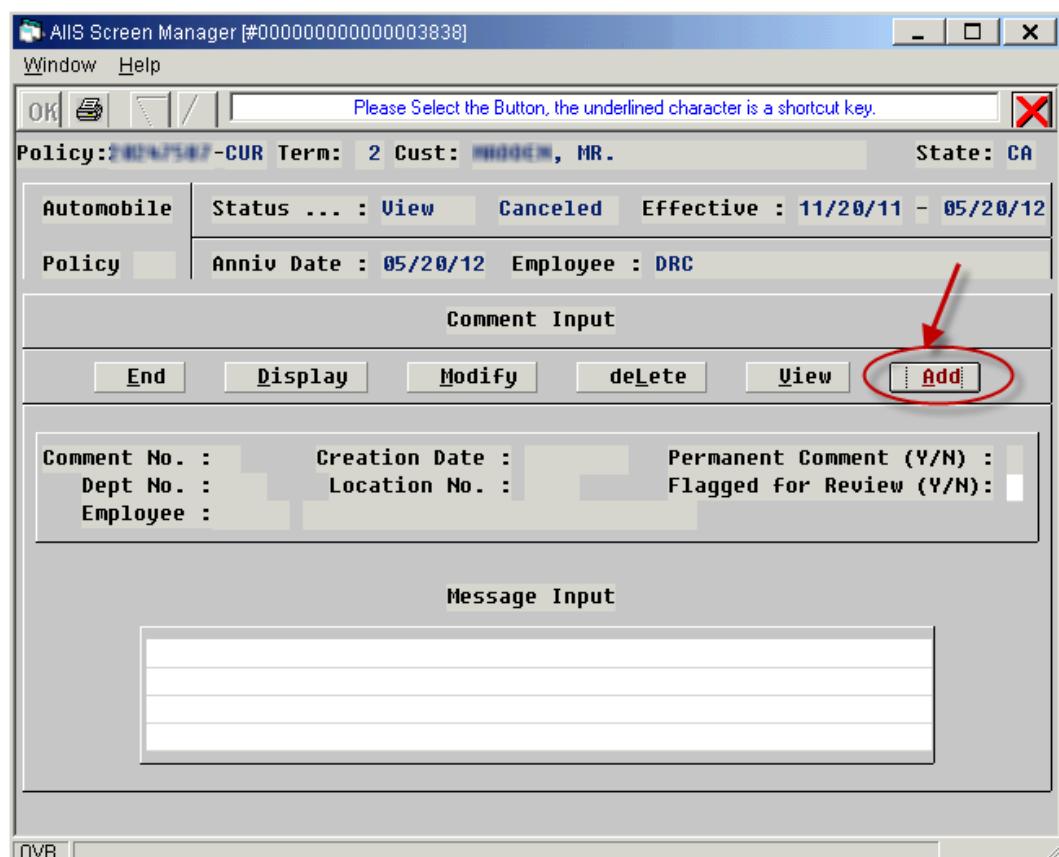
This is the comments screen. Here we can read the comments (V for View).



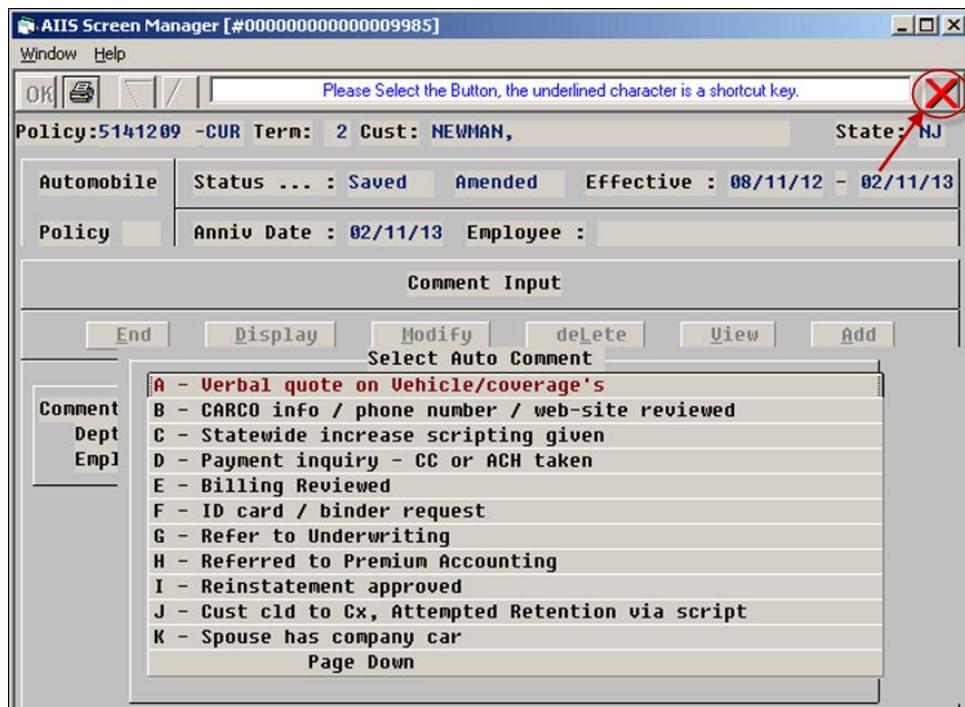
Comments are posted in reverse chronological order, meaning the newest comments are on top. If a comment is flagged it will remain on top no matter how many other comments are posted. We will not be flagging our comments. Simply tab past this field since it will default to no flag.



At the comment screen you can add comments (A for Add)

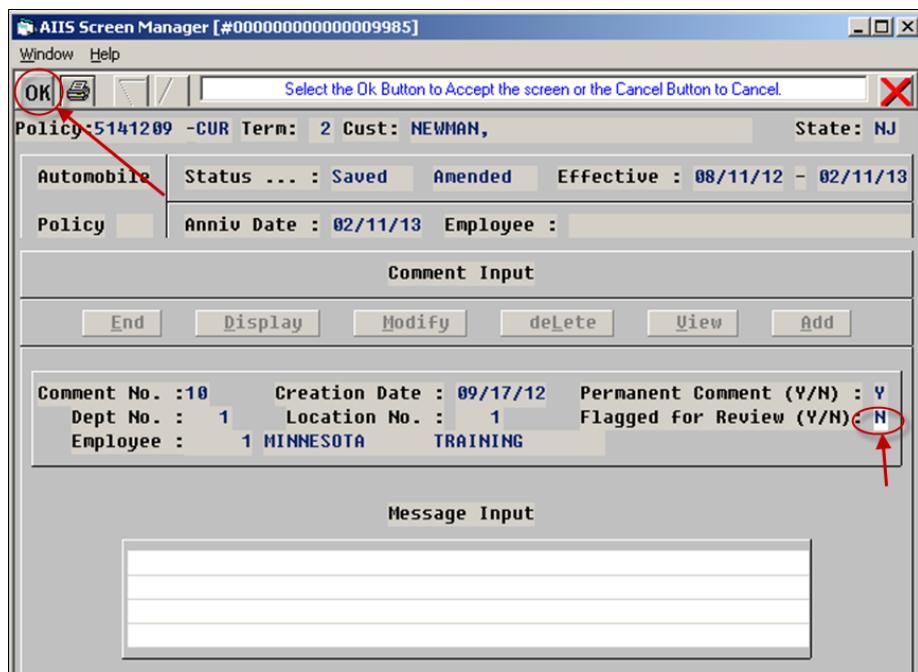


Once you have tabbed past the flagged field, a list of preset comments will display. Feel free to use these if they apply to transaction you just completed or use escape to dismiss them.



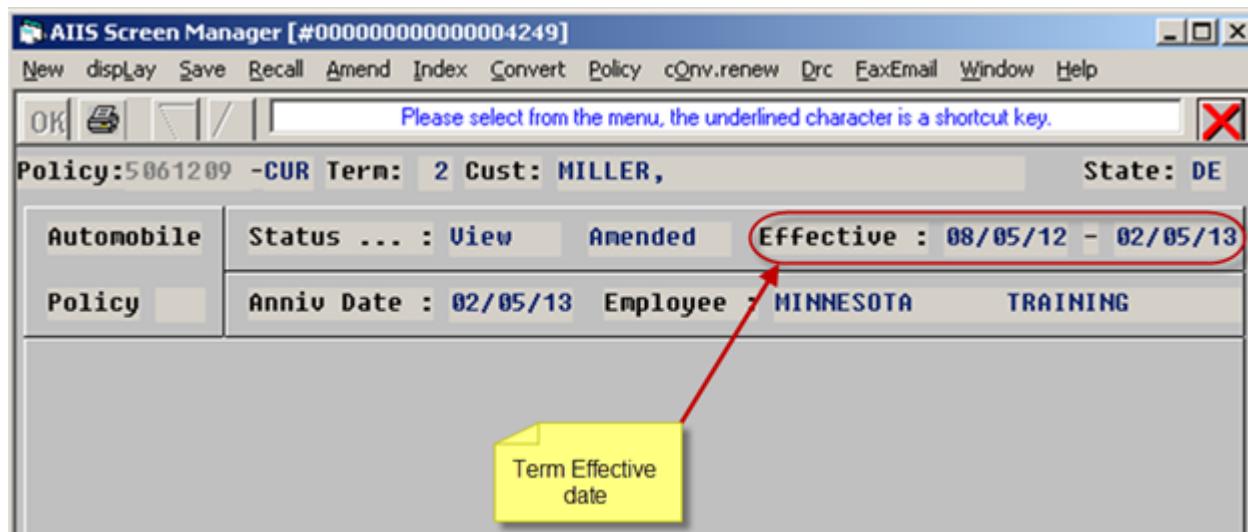
Use the lines provided to post your comment this is a free flow field. However remember comments will help everyone who accesses the policy in the future so be sure they are clear and understandable.

When finished press the **F1 key** or select the “**OK**” button to keep the comments. Comments do not need to be saved, meaning that once **F1 key** or select the “**OK**” button is pressed at the end of a comment, the rep does not need to go through the save process again. Save only needs to be used when the amend function was used to add an item to the policy.

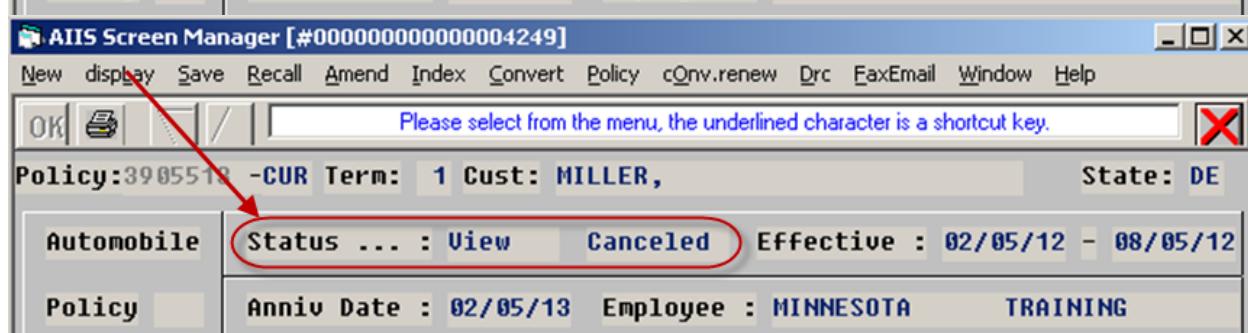
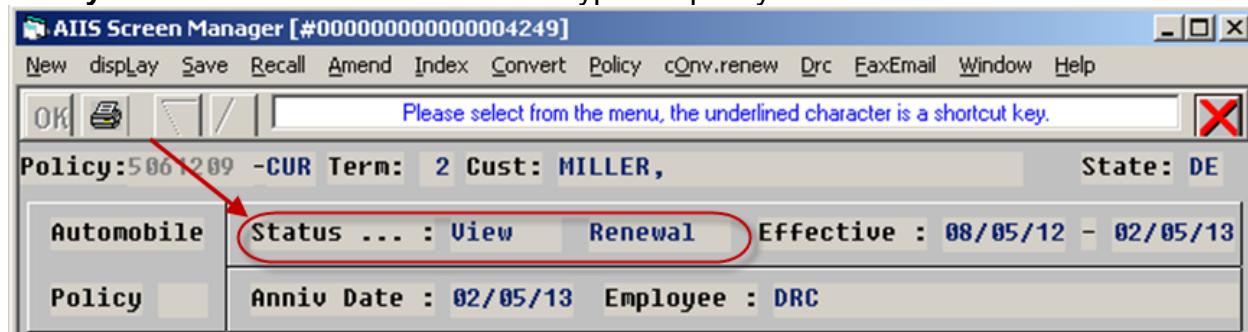


## Section 4 – Coverage Verification (Limits & Effective Dates)

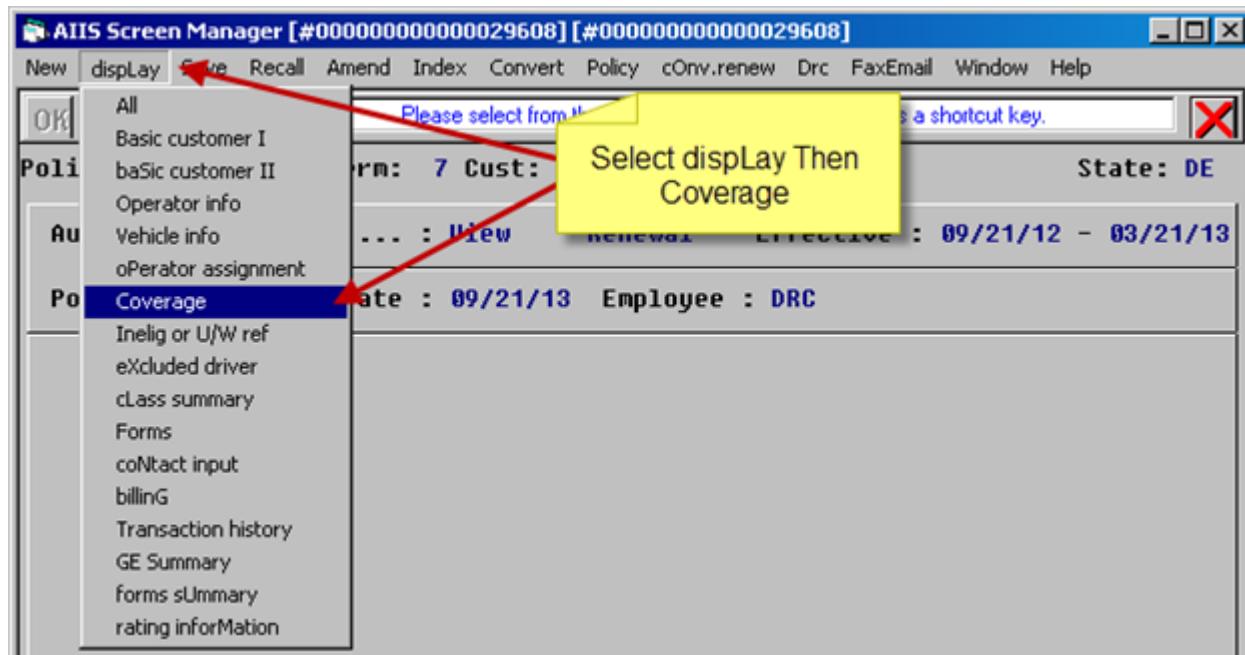
One of the most common questions from the claims department will be for the term effective dates of the policy. We can see this in the upper right hand corner of the DRC window after you “Recall” the policy holder.



**Policy Status:** Here are three different types of policy's statuses



Once you have recalled the policy holder, to see coverage information you will select "Display". Since we will only be verifying coverage and not changing limits, we will use the Display function.



Once you have selected the coverage screen you will see the types of coverage the insured has for the vehicle.

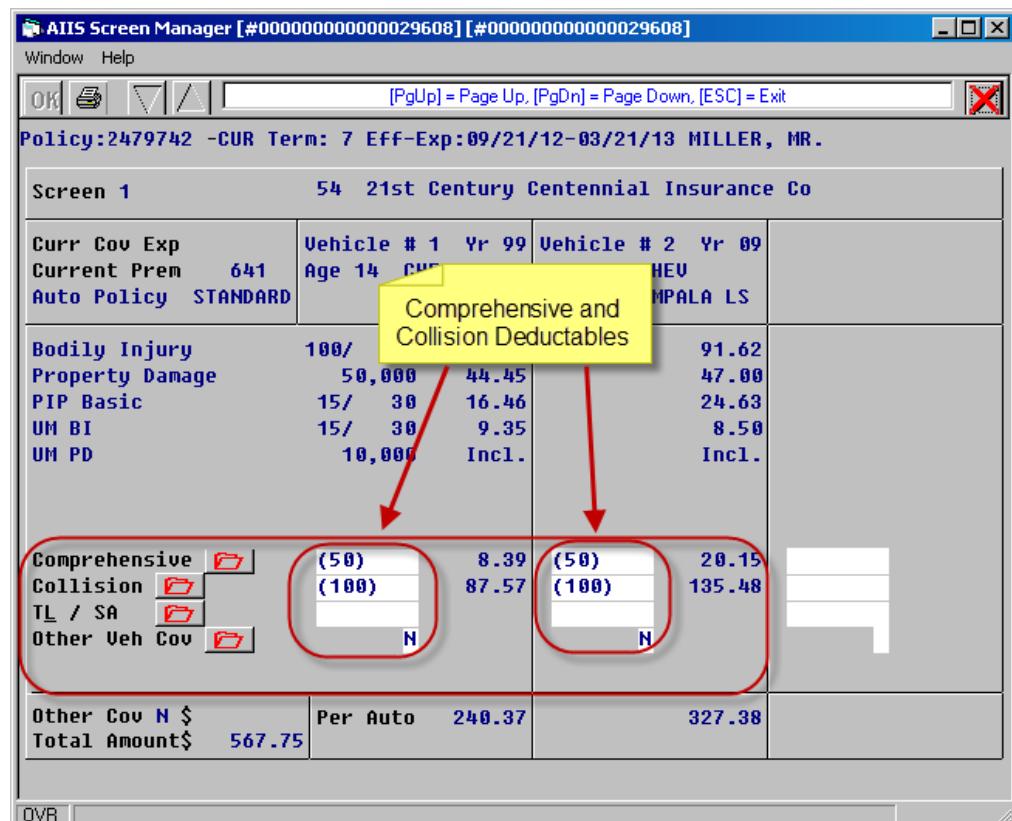
**Remember: If there is no Comprehensive or Collision Listed the coverage does not apply to the vehicle.**

A screenshot of the coverage screen. The window title is "AIIS Screen Manager [#00000000000000004249]". The top bar includes "Window" and "Help". The main area displays policy information: "Policy: 5061209 -CUR Term: 2 EFF-Exp: 08/05/12-02/05/13 MILLER,". Below this is a table for "Screen 1" from "54 21st Century Centennial Insurance Co". The table shows current coverage details:

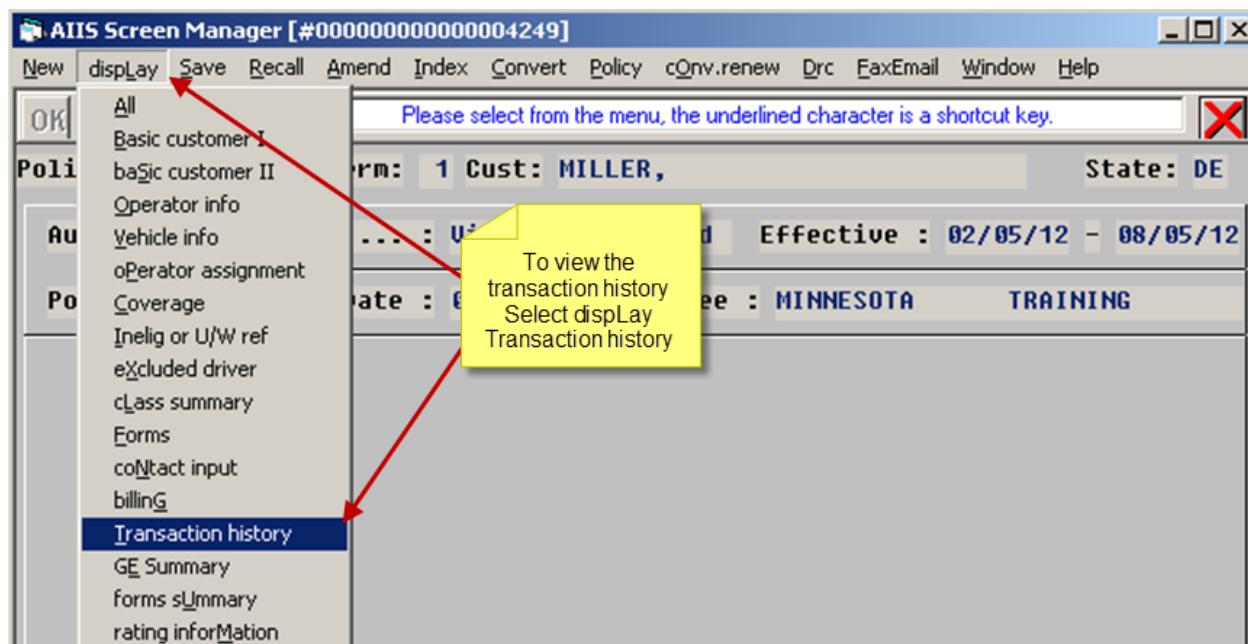
Curr Cov Exp	Vehicle # 1	Yr 08
Current Prem	Age 5	BMW
Auto Policy	X3	3.0SI

A yellow callout box next to the table says "These are the coverages the claims agent will be asking for." Below the table, a section for "Comprehensive" and "Collision" is shown, both with checkboxes. Other coverage options listed are "TL / SA" and "Other Veh Cov". At the bottom, there is a row for "Other Cov N \$" and "Total Amount\$ 875.97".

If the customer does have Comprehensive or Collision deductables they will be listed:

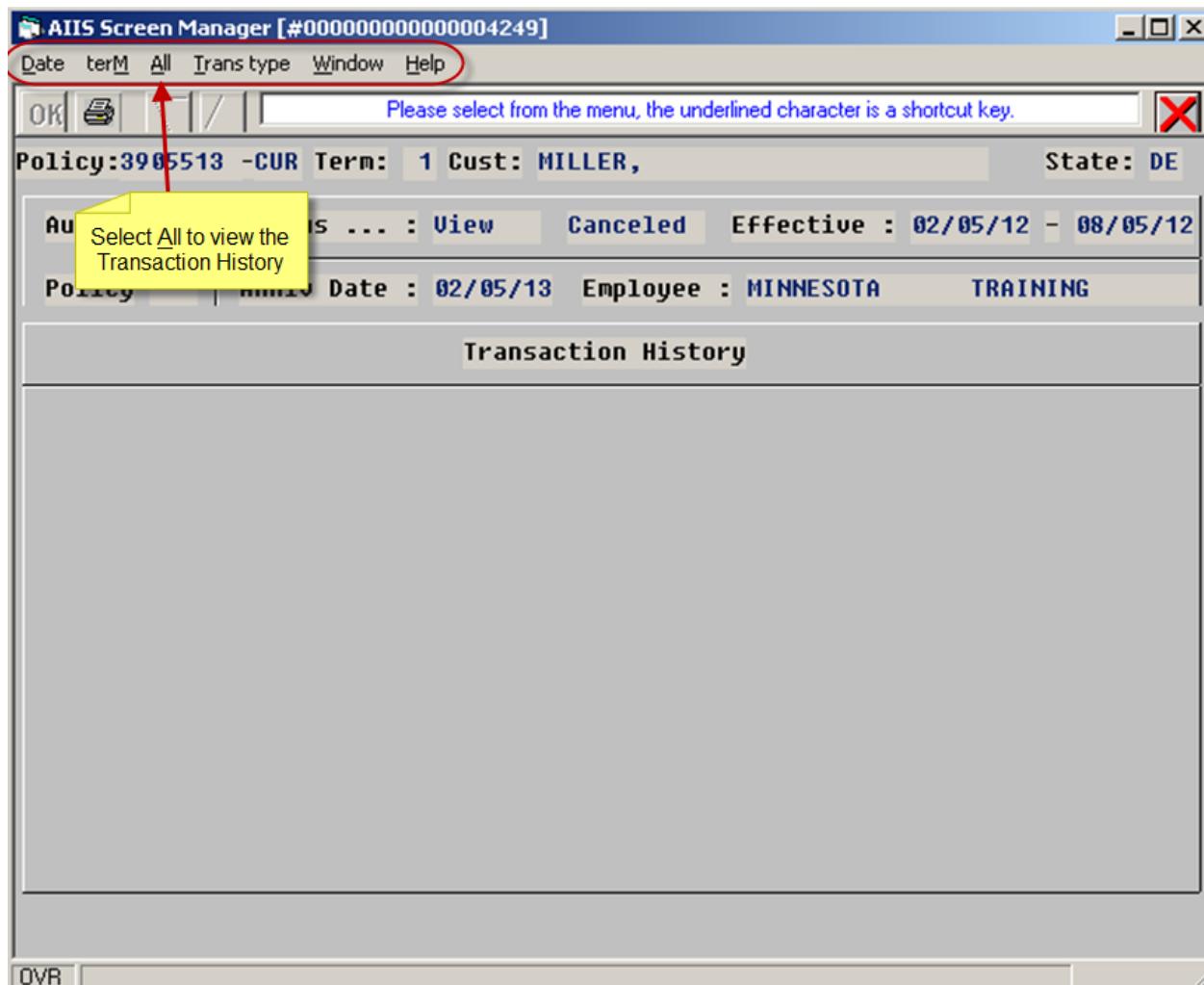


From the Display menu we will access the Transaction History screen using the hot key T. This screen will show us what changes took place on a policy and what date those changes became effective.



When we first view the Transaction History screen, it may first appear that there are no transactions listed. However, here we need to pay attention to the menu options at the top of the screen – they are now different.

DRC is giving us the option to select how we want to view the transaction history. We can view them by date, term, type of transaction, etc. The most common way to view the transactions is with the **All function**. This will list all the transactions made to a policy. Notice we need to activate the menu by pressing Alt and then A for All.



Transactions are listed in reverse chronological order, meaning the newest transactions are at the top. In this example we can see the last transaction was Cancellation Insured Request.

**IN THE YELLOW NOTE:** The “Trans Eff Date” extremely important and can vary from the date the change was processed (Date Proces'd).

AIIS Screen Manager [#0000000000000004249]

Window Help

[OK] [Print] [Cancel] [PgDn] = Page Down, [ESC] = Exit

Policy: 3905513 -CUR Term: State: DE

Automobile Status ... Effective : 02/05/12 - 08/05/12

Policy Anniv Date MINNESOTA TRAINING

The date a change was made effective is extremely important and can vary from the date the change was processed.

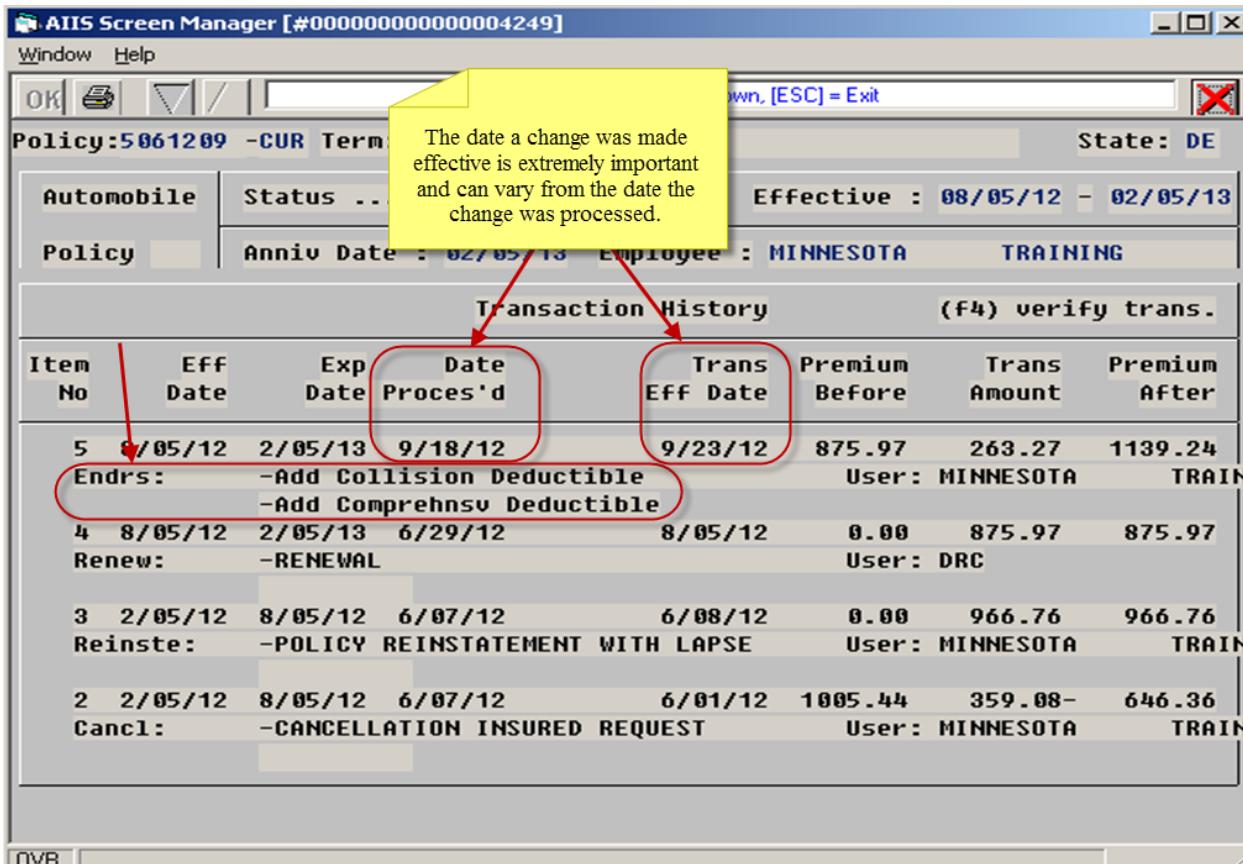
Transaction History (f4) verify trans.

Item No	EFF Date	Exp Date	Date Proces'd	Trans EFF Date	Premium Before	Trans Amount	Premium After
8	2/05/12	8/05/12	2/22/12	2/05/12	1065.59	1065.59-	0.00
Cancl:	-CANCELLATION INSURED REQUEST				User: MINNESOTA		TRAIN
7	2/05/12	8/05/12	2/22/12	2/05/12	0.00	1065.59	1065.59
Reiss:	-NEW POLICY REISSUE				User: MINNESOTA		TRAIN
6	3/05/12	9/05/12	2/22/12	3/05/12	1040.15	1040.15-	0.00
Cancl:	-CANCELLATION INSURED REQUEST				User: MINNESOTA		TRAIN
5	3/05/12	9/05/12	2/22/12	3/05/12	0.00	1040.15	1040.15
Reiss:	-NEW POLICY REISSUE				User: MINNESOTA		TRAIN

DVR

The date coverage was added or changed will also be important to claims.

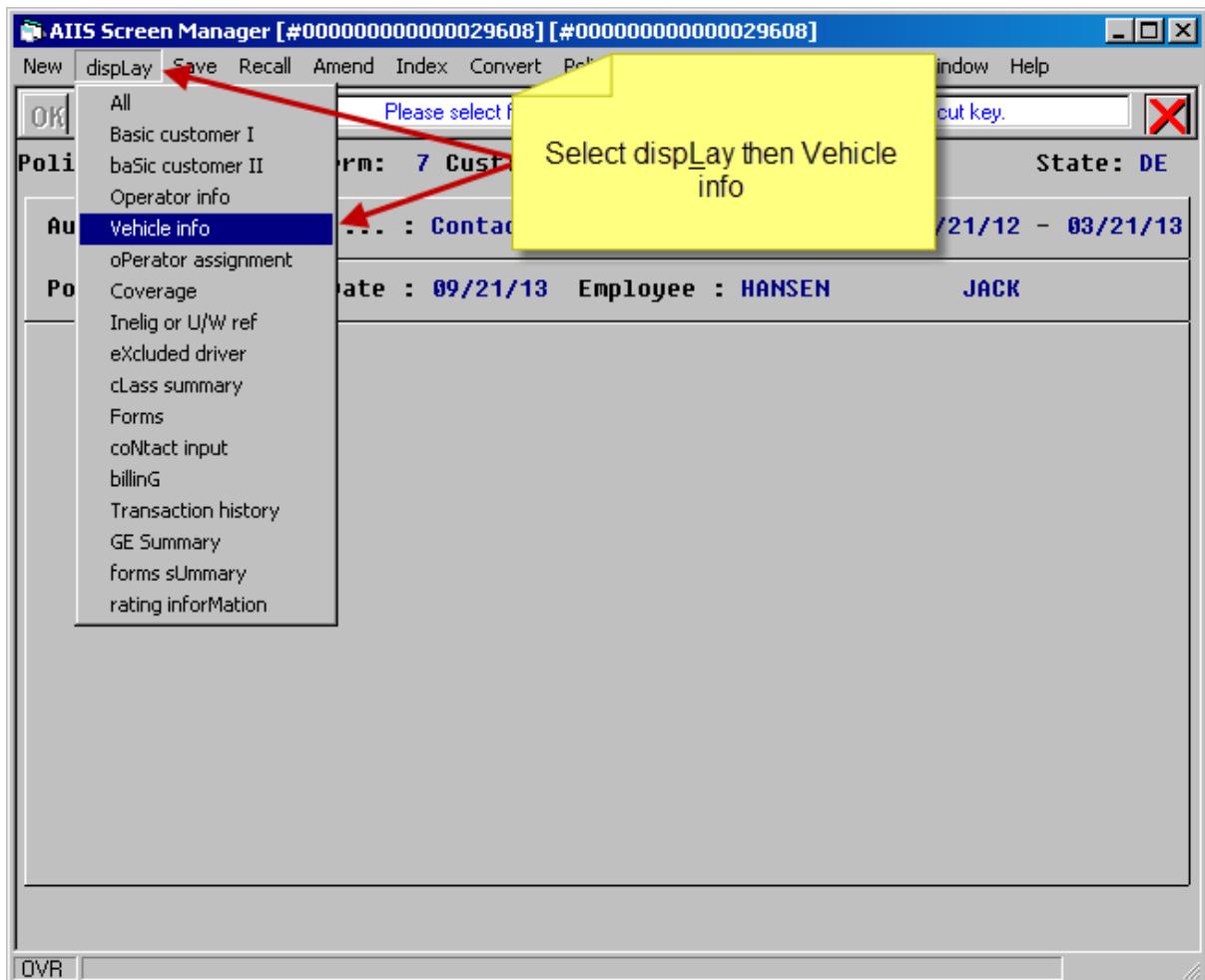
**IN THE YELLOW NOTE:** The “Trans Eff Date” extremely important and can vary from the date the change was processed (Date Proces'd).



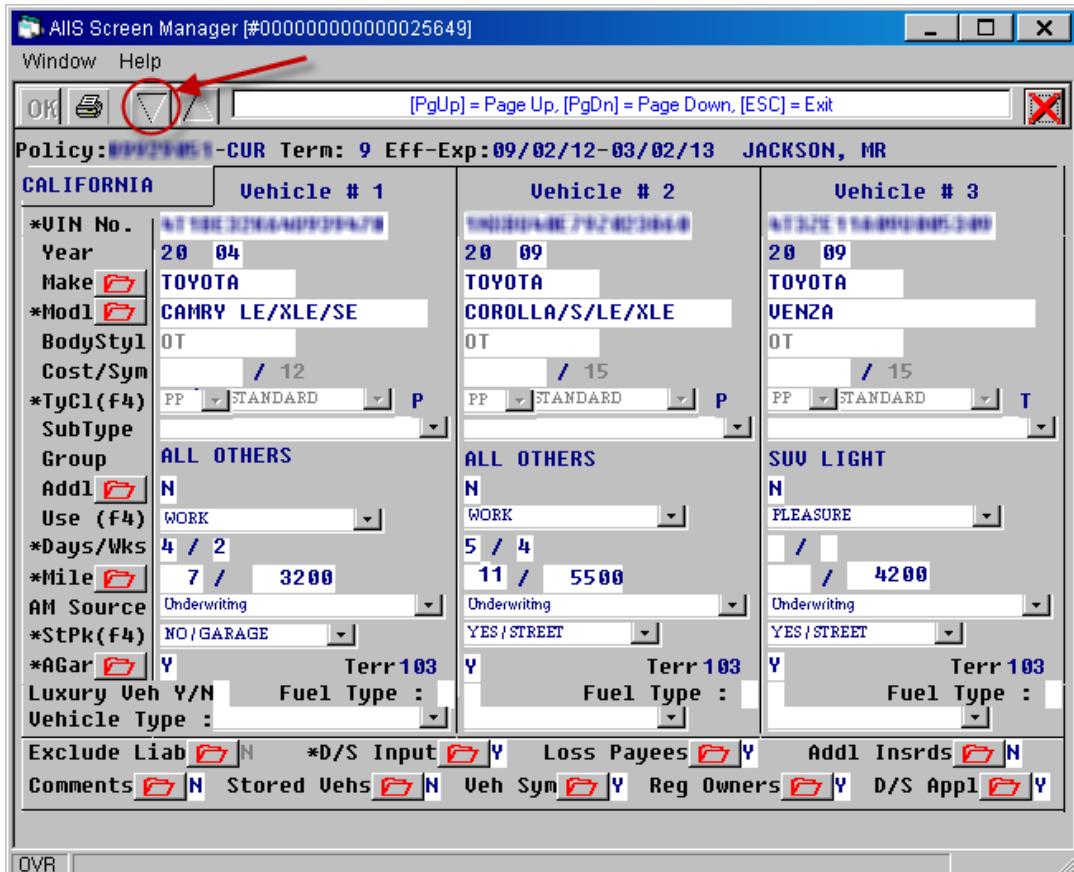
If you are unable to answer claims questions regarding billing, payments or questions other than what we have discussed, warm transfer the claims rep to 1-888-314-4037 for a 21st Service representative.

## Section 5 – Lienholder Verification (Review & Amending)

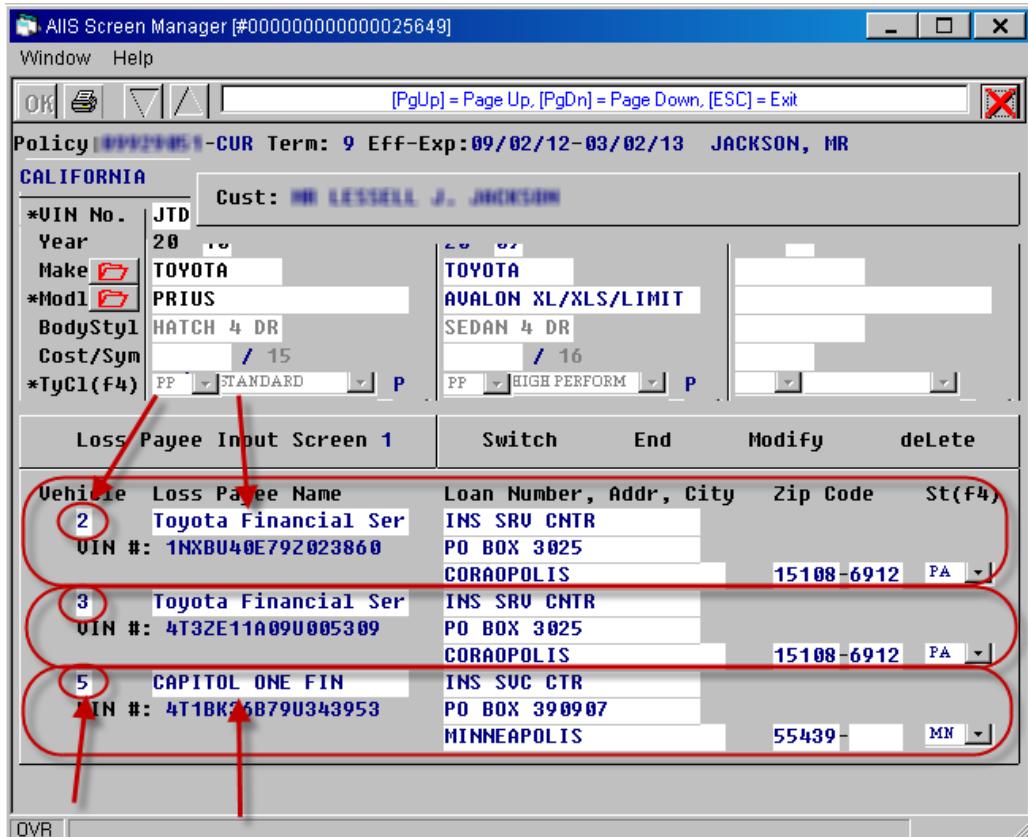
To View the Lienholder information:



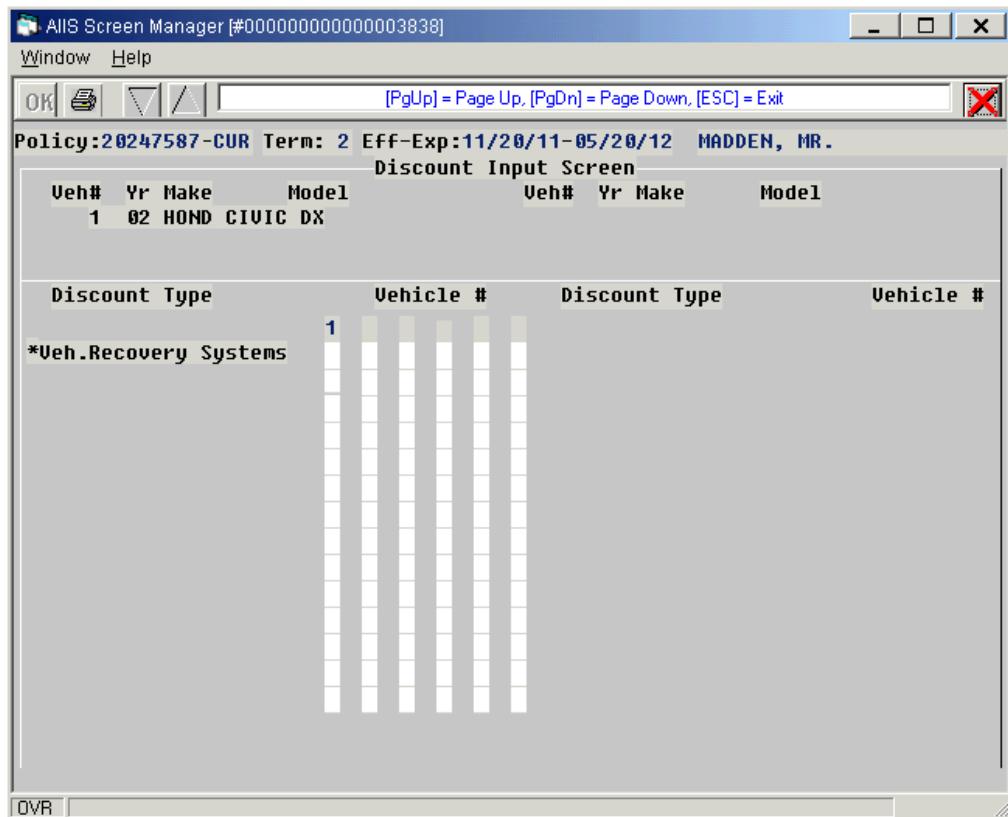
Page down to view Loss Payee Input Screen



This is where the Loss Payee will be listed

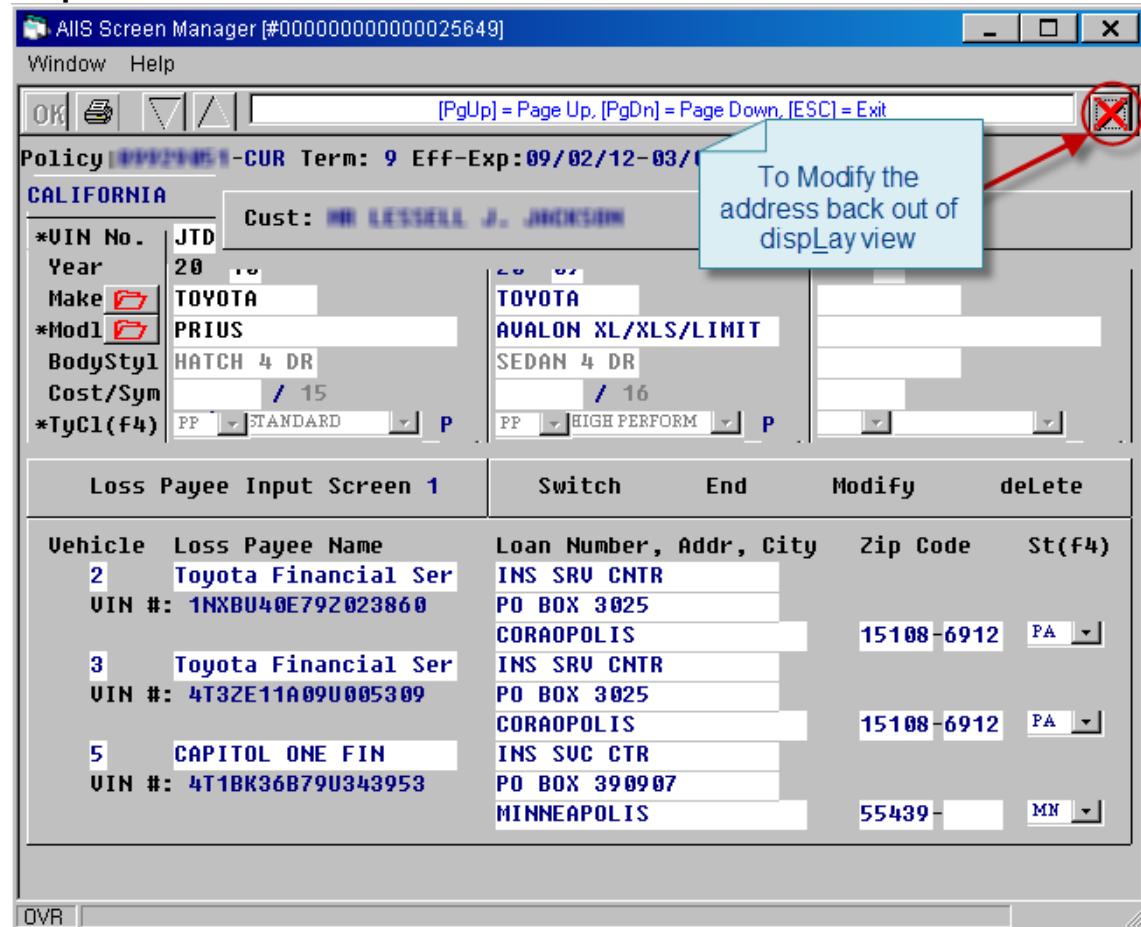


If no Loss Payee is listed you'll receive this screen

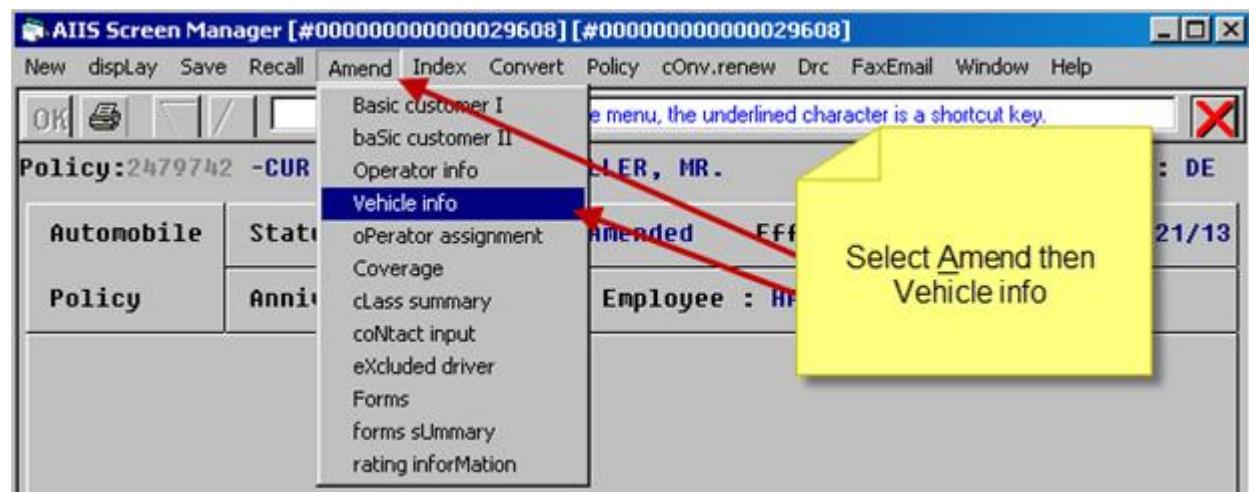


## Adding and deleting Loss Payees and Additional Insureds:

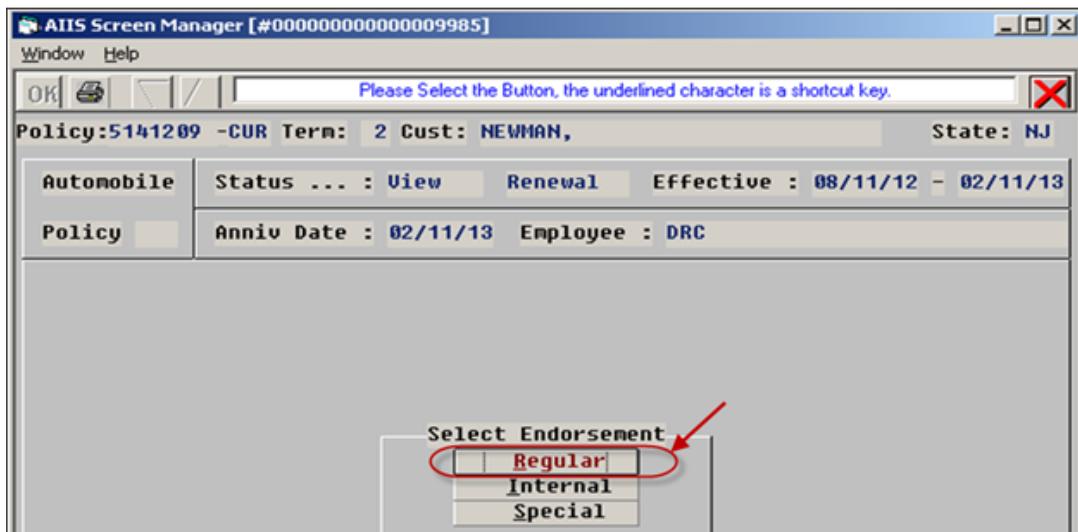
### Step 1



### Step 2

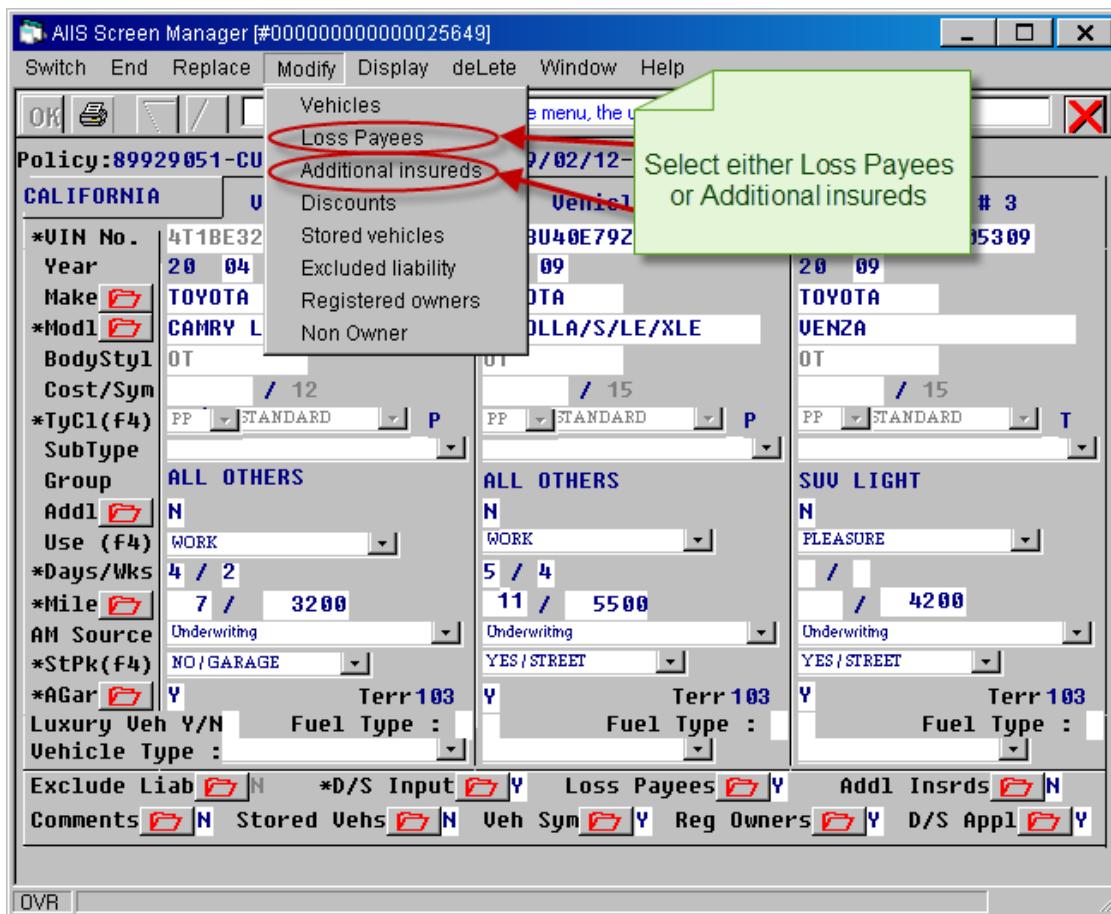


### Step 3

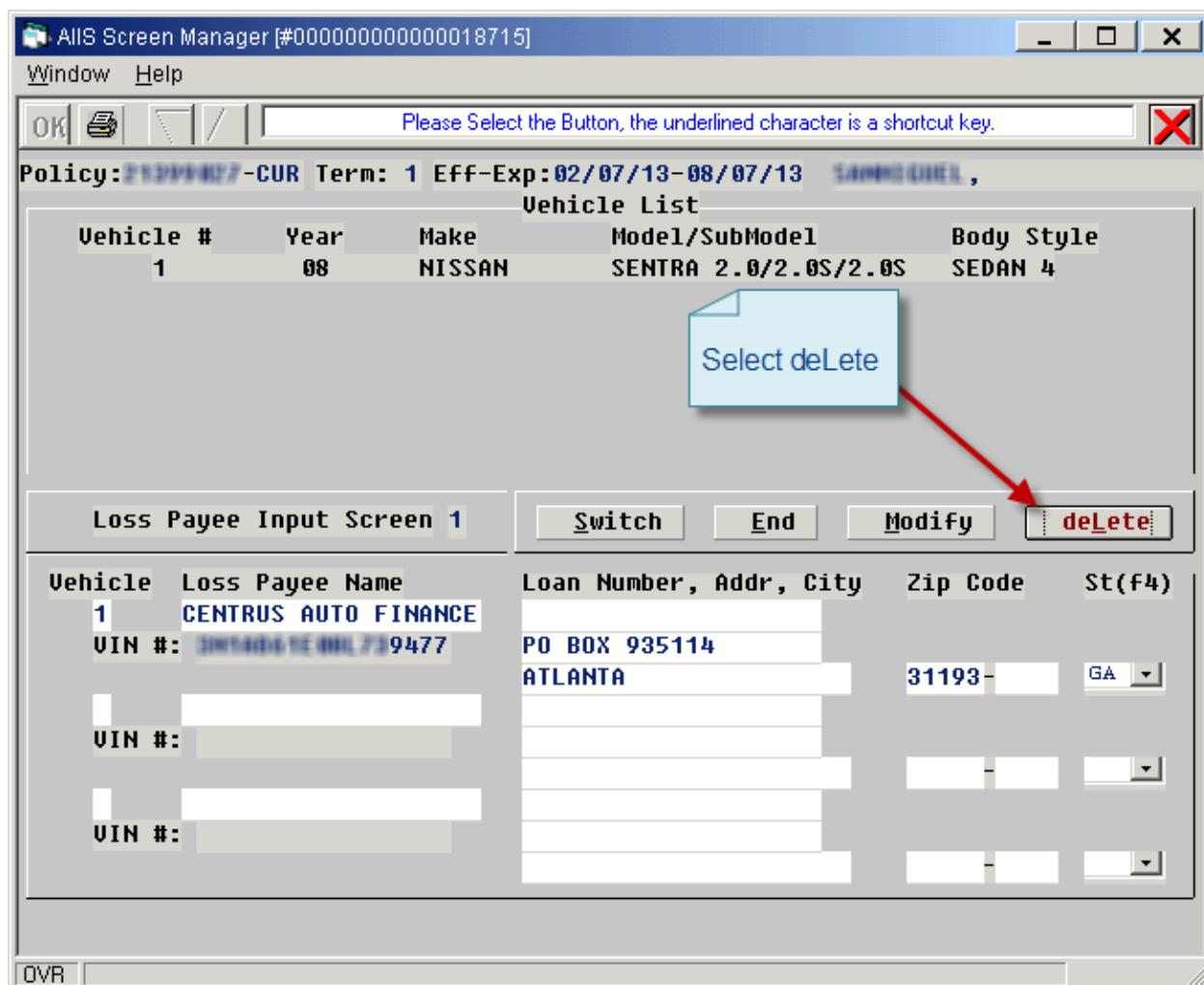


### Step 4

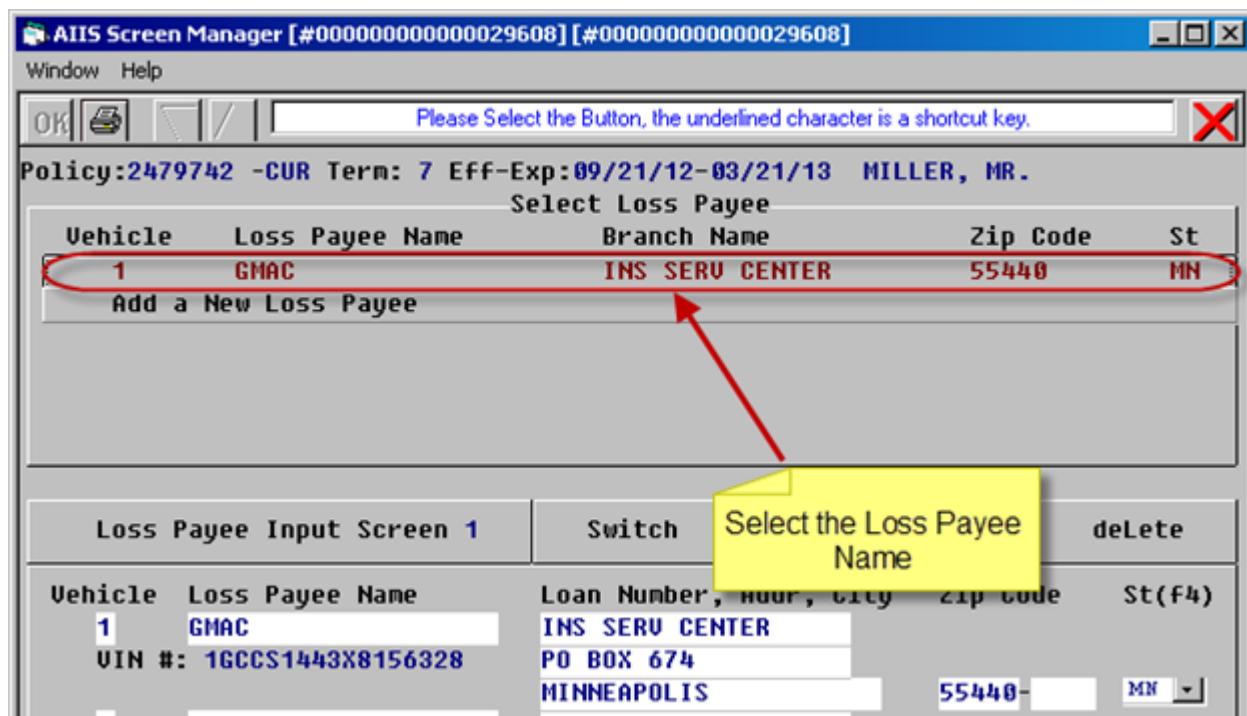
Either select a Loss Payee or Additional insureds. The next steps show how to modify a Loss Payee. Follow these same steps for modifying Additional insureds. **Note:** Additional insured does NOT mean additional drivers. Additional insureds is referencing leasing companies.



## Step 5

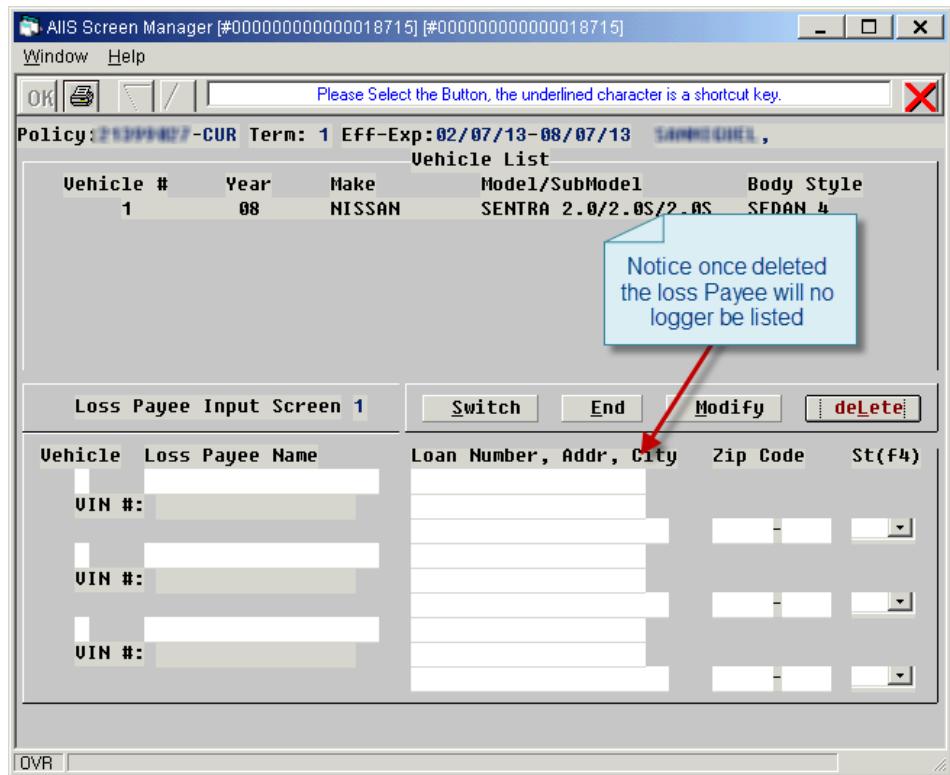


## Step 6



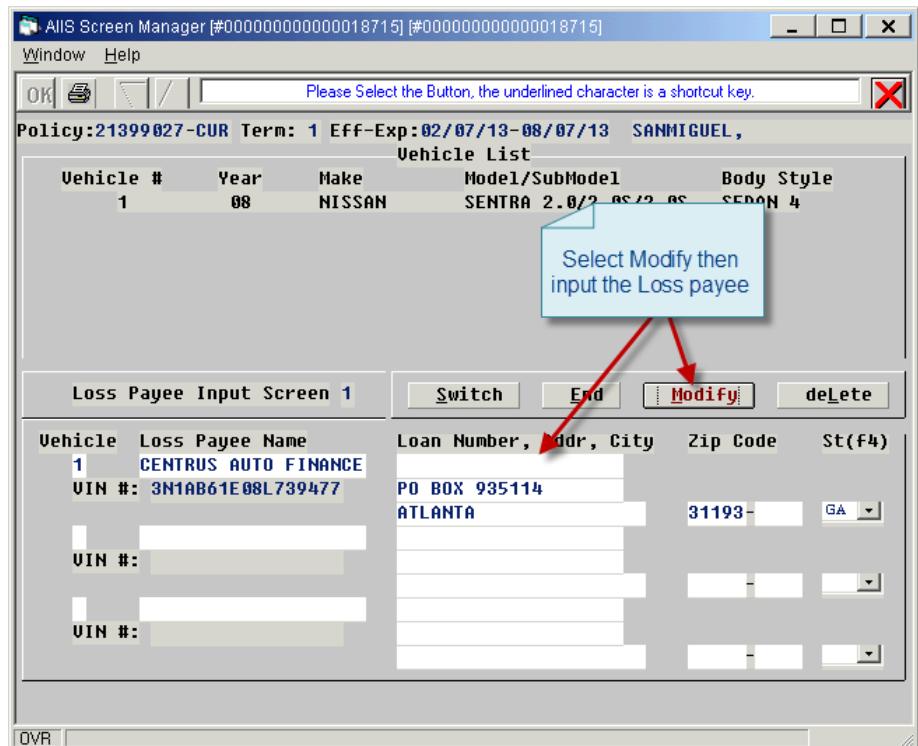
## Step 7

After deleting the information follow the save guidelines.

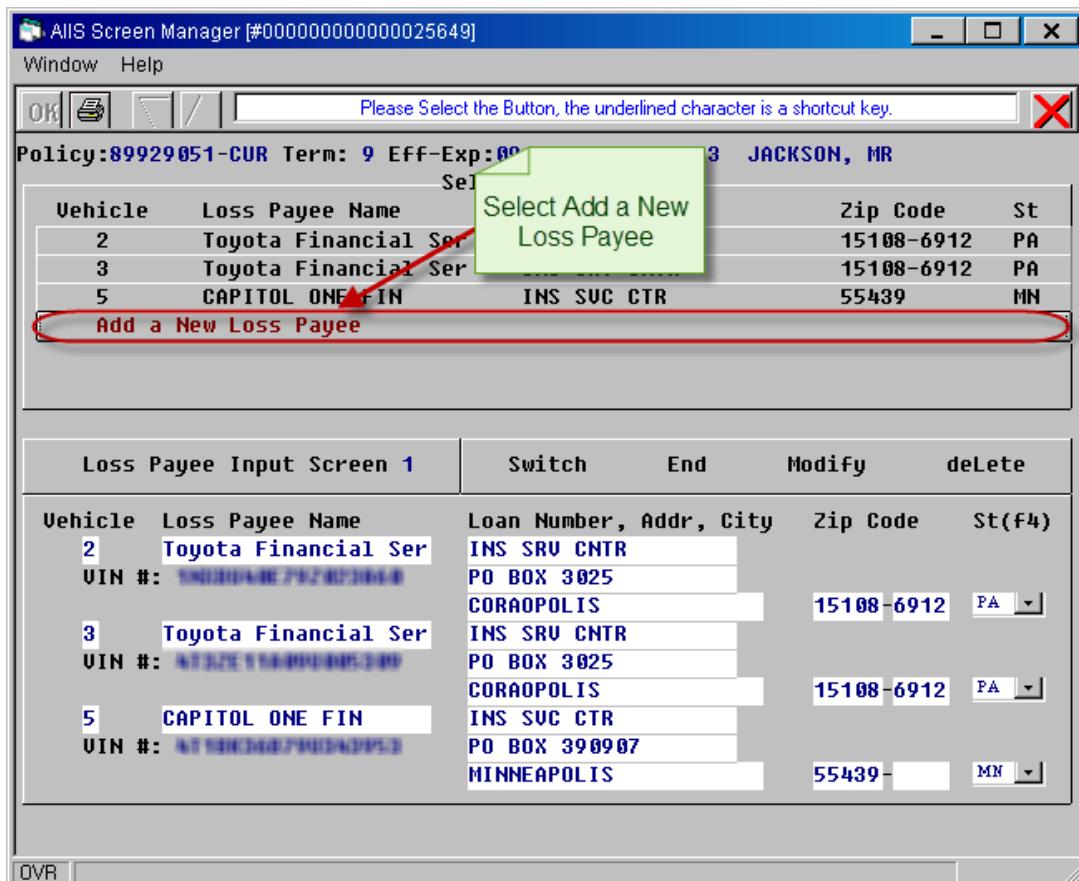


## Step 8

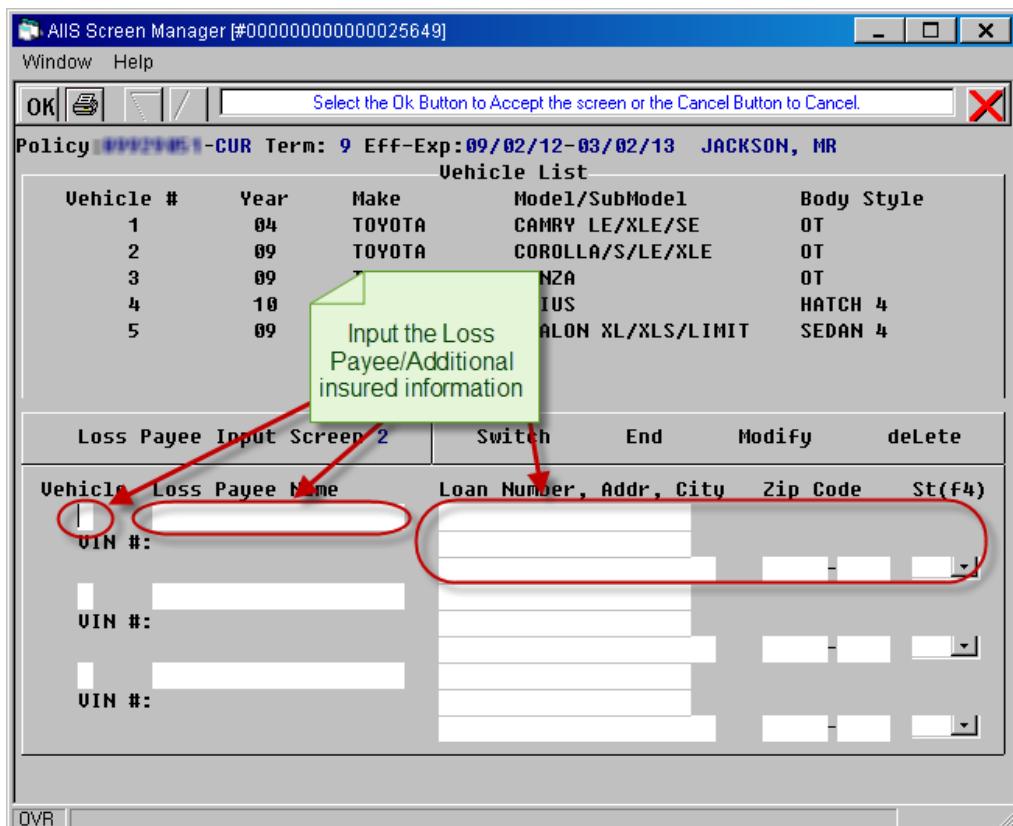
Once you saved the deleted Loss Payee Transaction follow steps 1-4. Next, add the updated Loss Payee information.



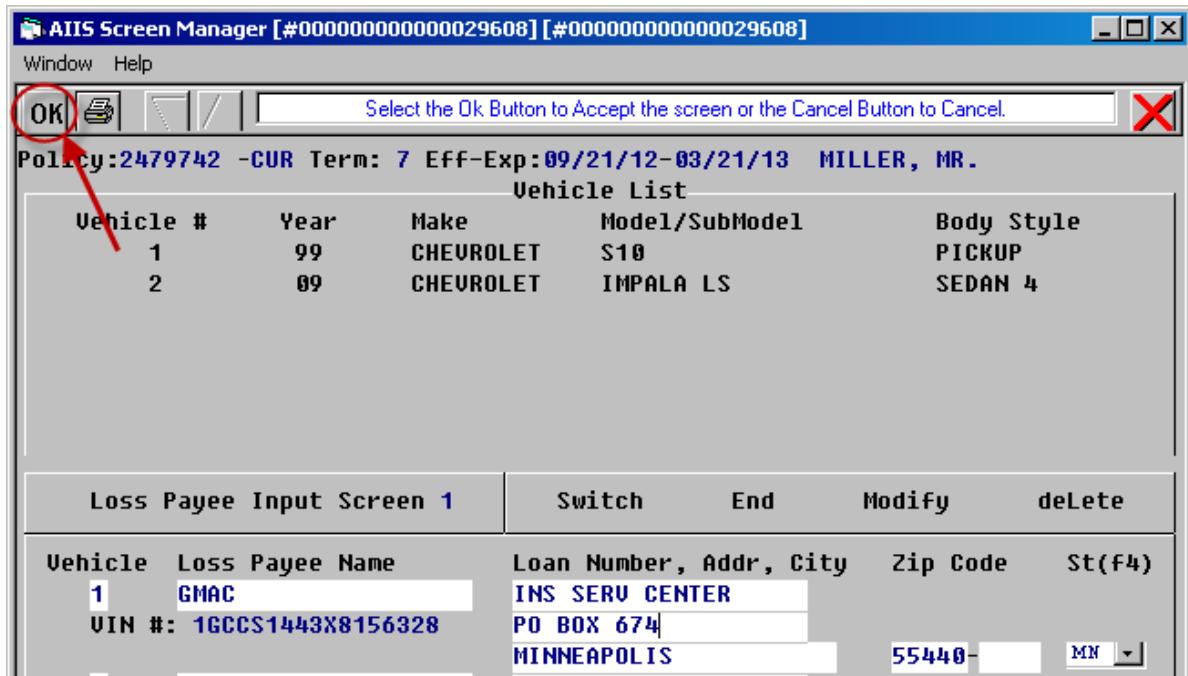
If there is more then three Loss Payee/Additional insured listed you would select Add Loss Payee/Additional insured



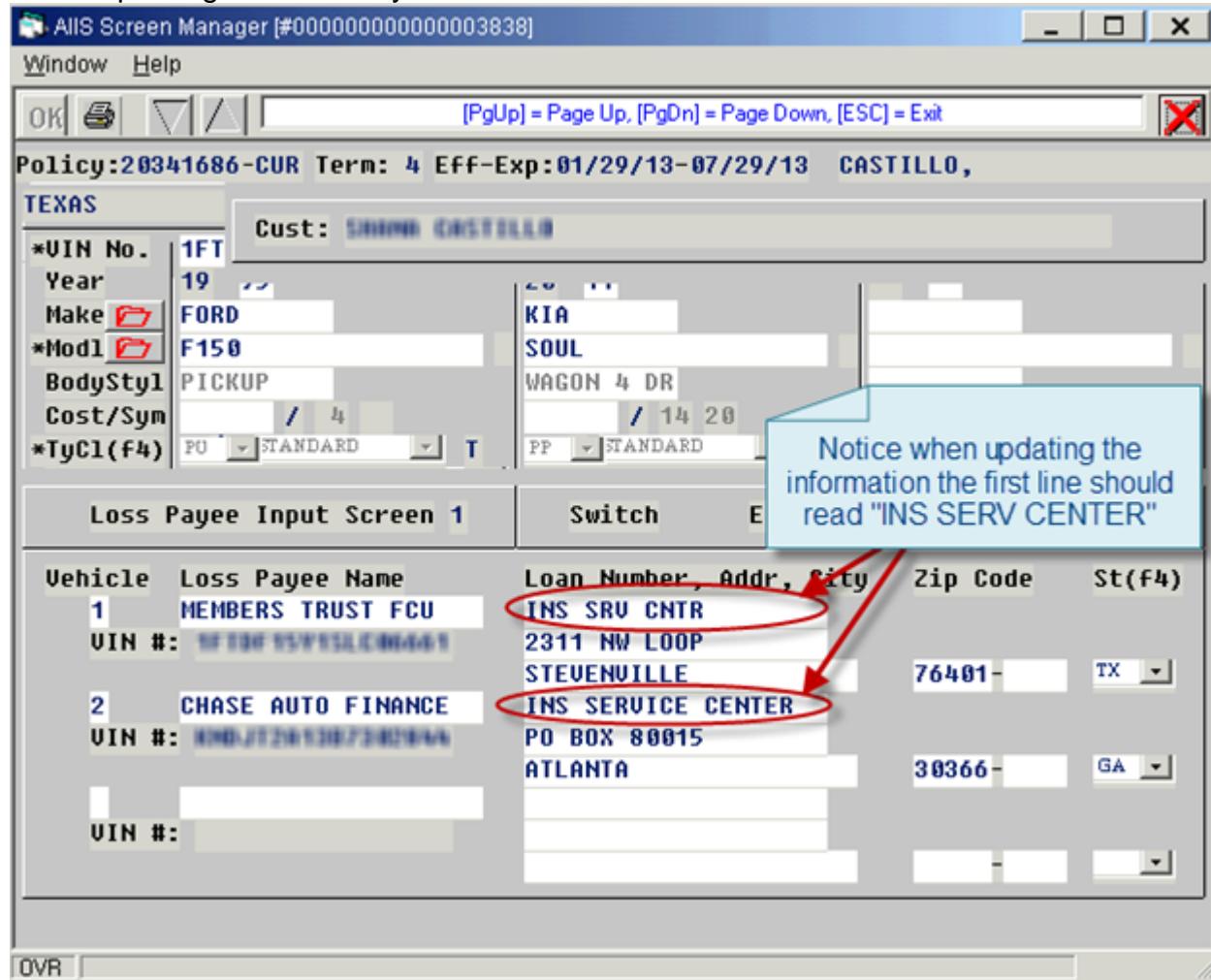
Input the Loss Payee/Additional insured information



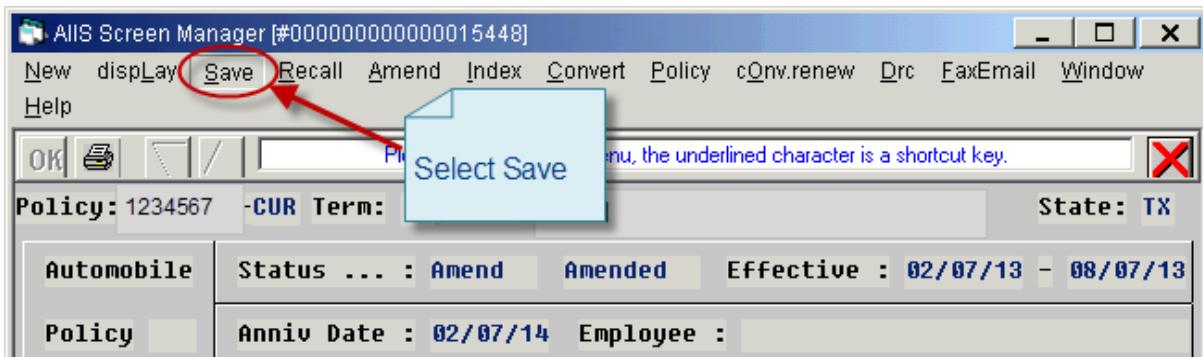
To save the information updated Select the **F1 key** or select the “**OK**” button.



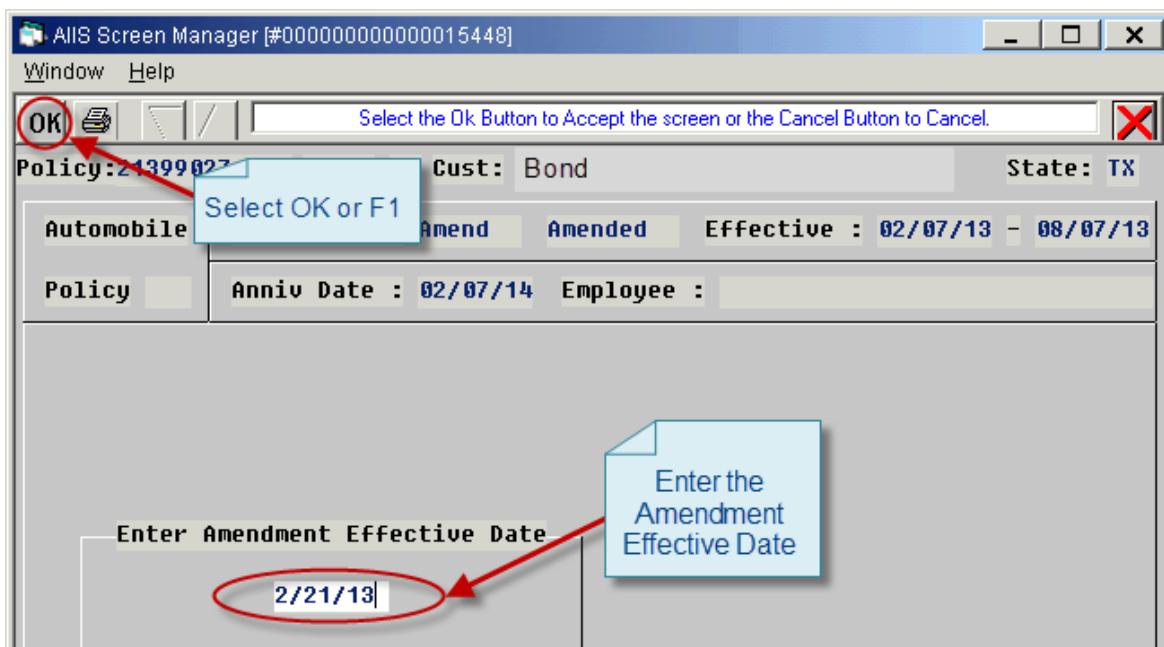
When updating the Loss Payee on the first line Enter “**INS SERV CENTER**”



From the “home” screen press Alt. key to activated “hot keys” at top of screen, then S to save



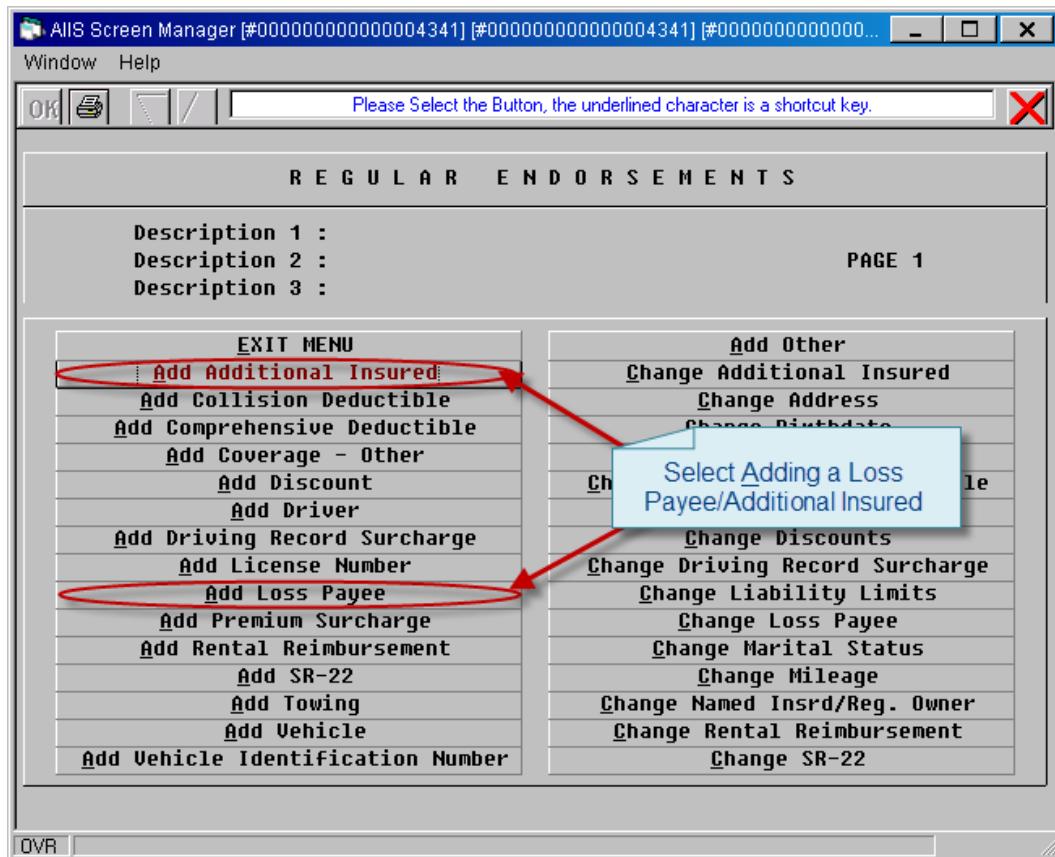
Enter effective date of change and press F1 key or select the “OK” button.



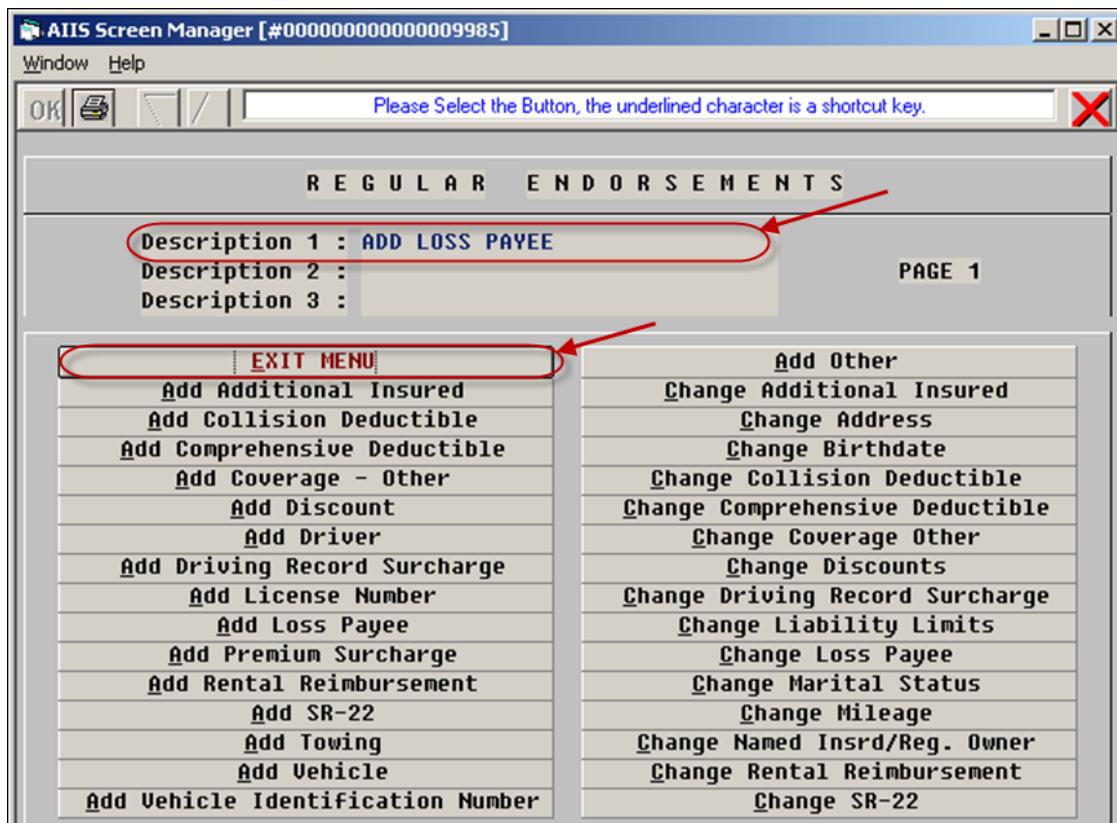
Select endorsement performed from the endorsement selection screen

**NOTE: NEVER USE CHANGE OR CORRECT ENDORSEMENTS WHEN UPDATING LOSS PAYEE/ADDITIONAL INSURED INFORMATION**

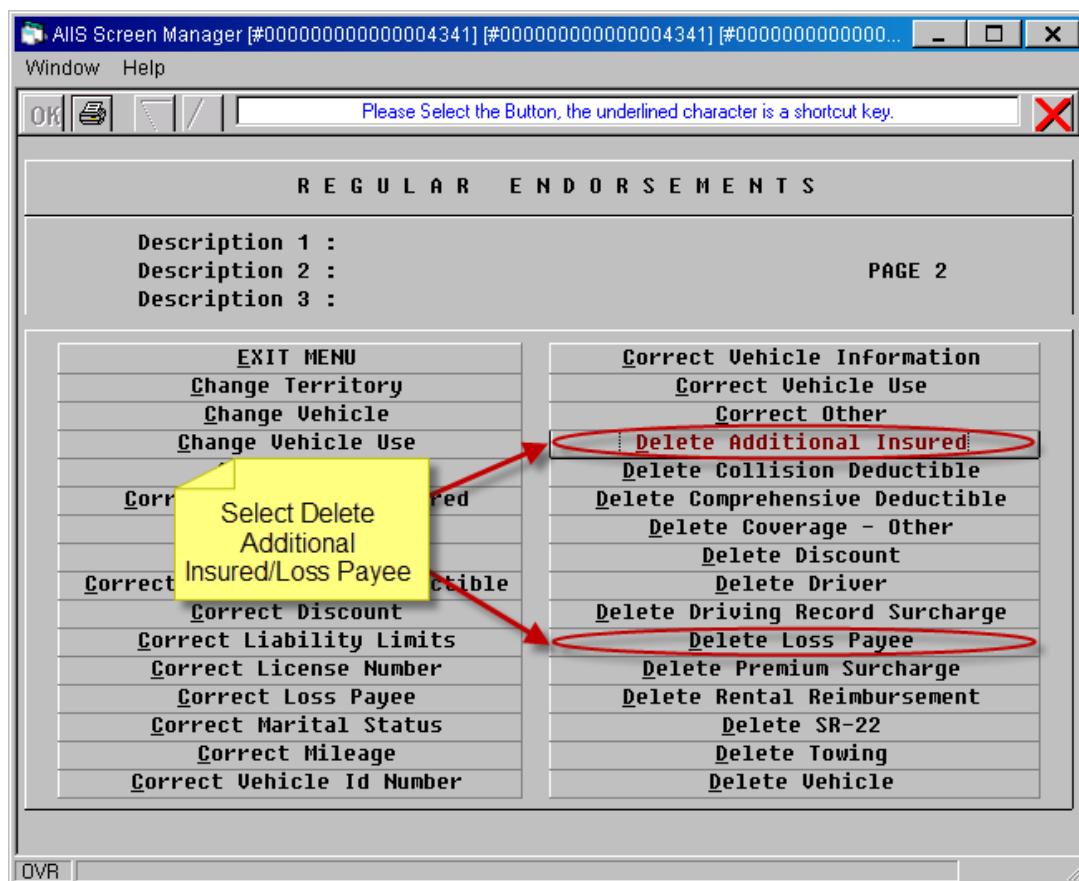
If adding a Loss Payee/Additional Insured select the Add option.



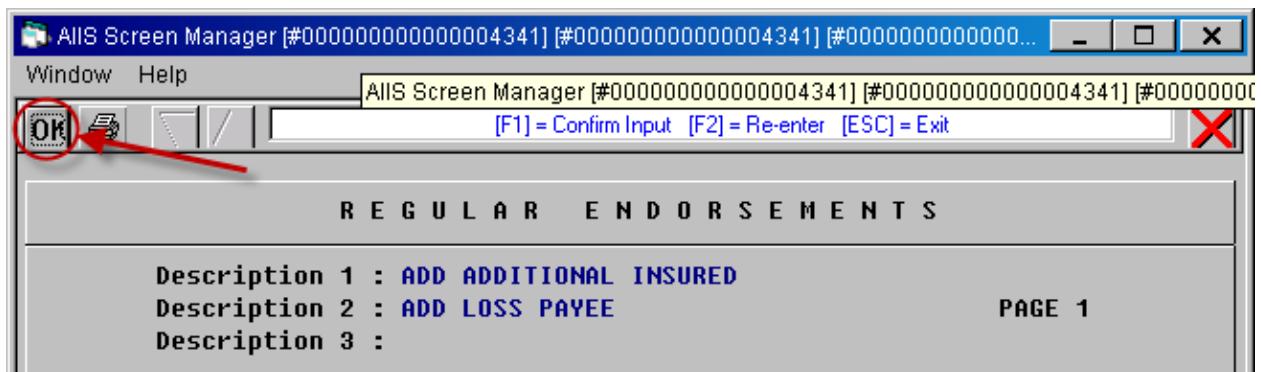
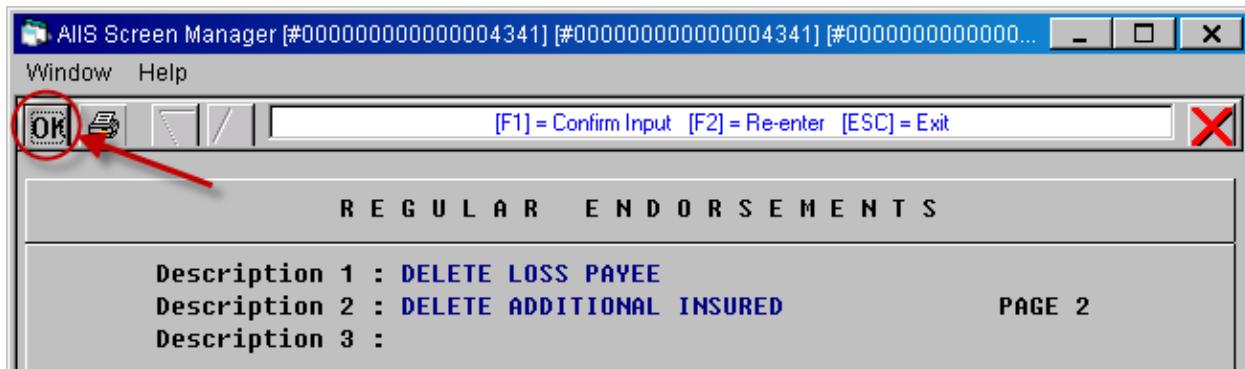
## Exit endorsement selection screen



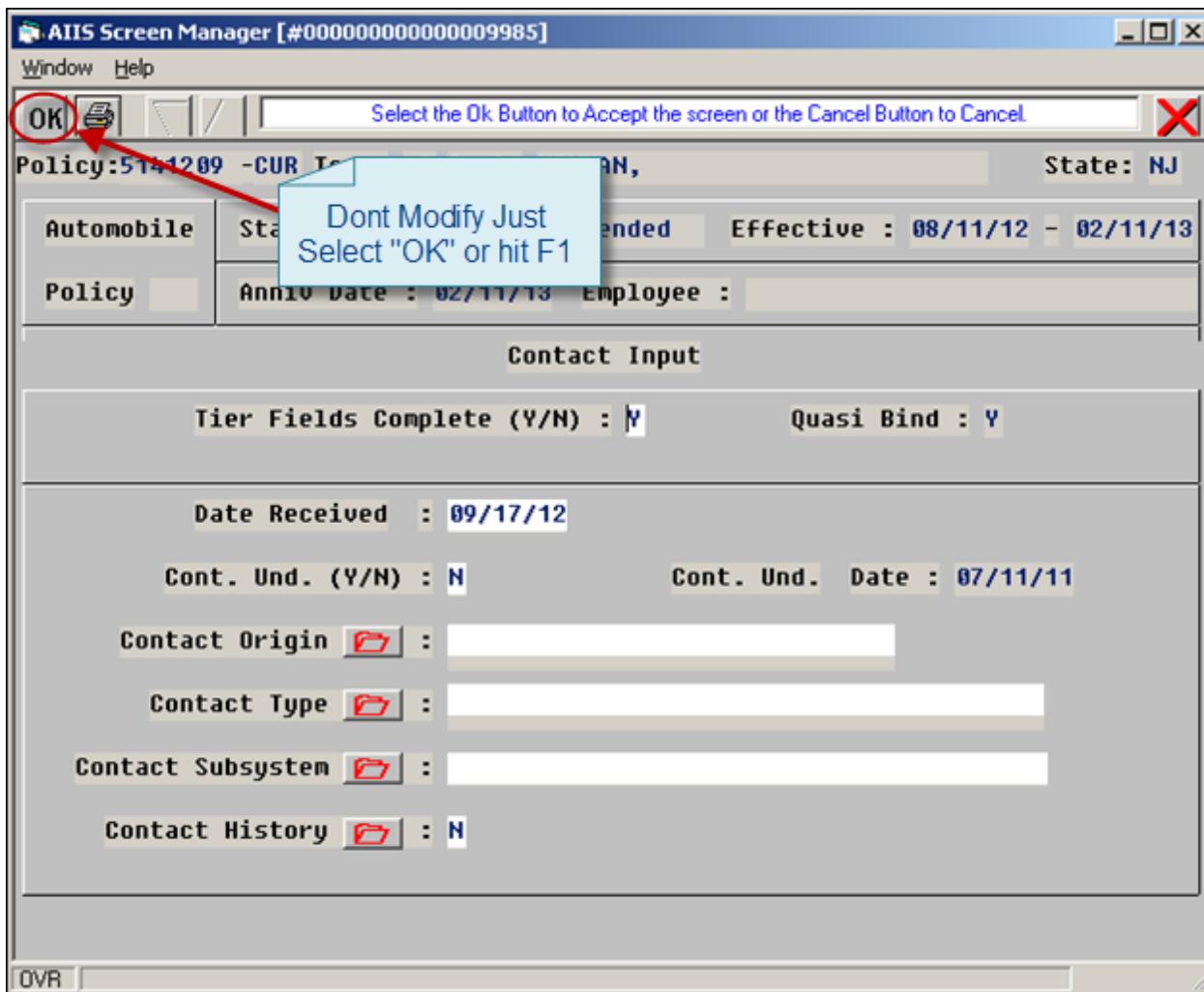
If Deleting an Additional Insured/Loss Payee you must **PAGE DOWN** to Select the Delete Endorsement



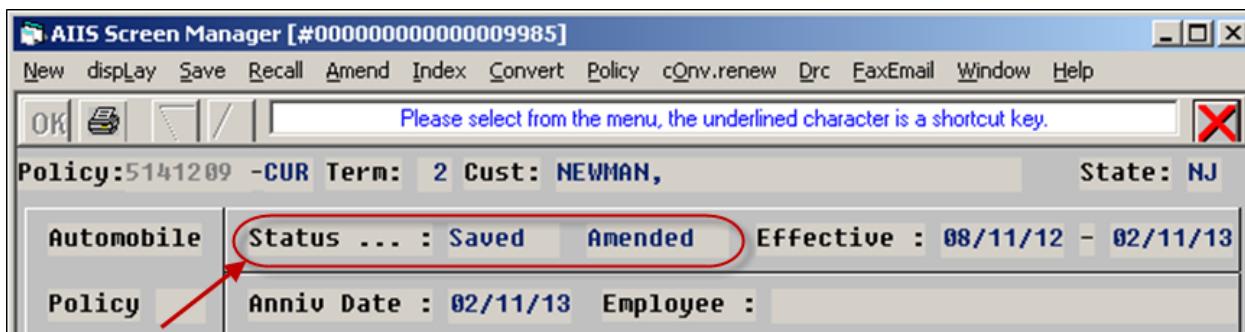
Once desired Endorsements are selected, press **F1 key** or select the “**OK**” button – transaction is saved



After pressing **F1** key or select the “**OK**” button to complete the save, DRC will display the Contact Input Screen. **There is no need to modify this screen, just press the F1 button to dismiss it.**

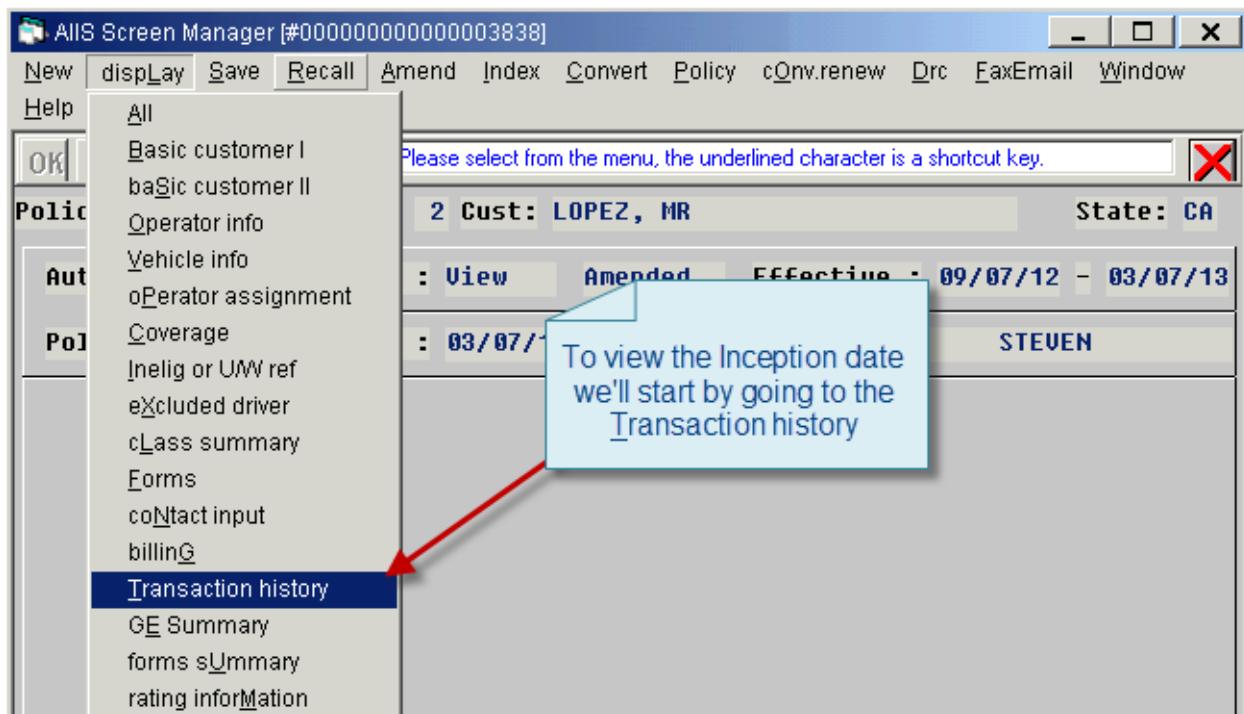


Once the save is complete, the user will be returned to the “home” screen. If you are not certain if you saved successfully, check the status of the policy. It is in the upper middle portion of the screen. Here you can see it reads “Saved”.



## Viewing the Addition/deletion date:

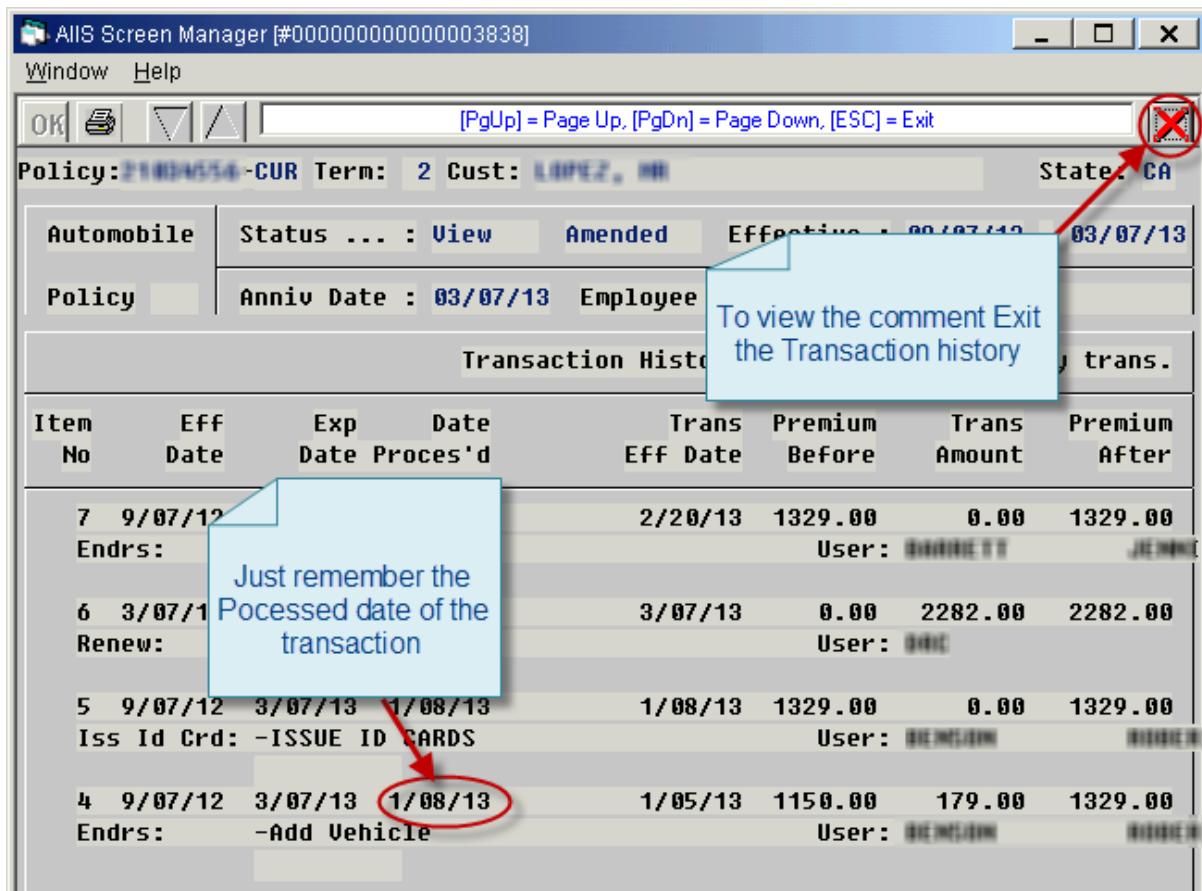
There are two places to check the addition/deletion of a vehicle. First is the transaction history screen.



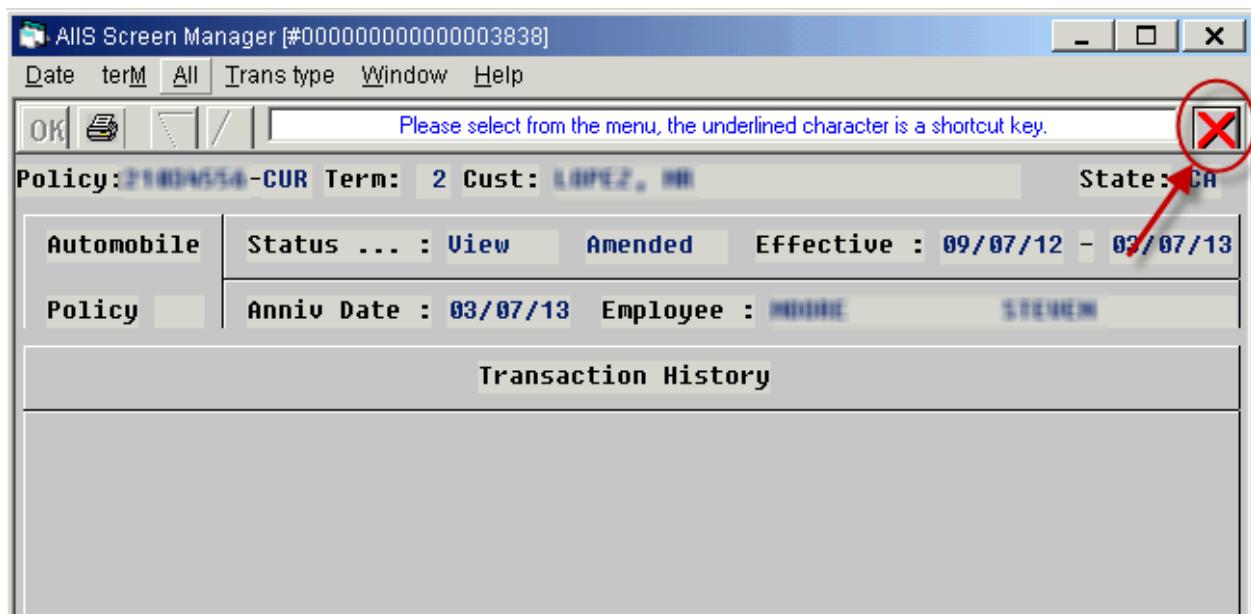
Scroll through this page until Add Vehicle (or Change/Delete Vehicle) endorsement is located. Notice a year, make and model will not display but you will see the exact date. With this date you can then view the comments, using the date from the transaction history screen to guide you.

A screenshot of the Allis Screen Manager software interface showing the "Policy" screen. The window title is "Allis Screen Manager [#00000000000000003838]". The menu bar includes "Window" and "Help". The main panel shows a policy record for "Term: 2 Cust: LOPEZ, MR" with "State: CA". It displays fields for "Automobile" (Status ... : View, Amended, Effective : 09/07/12 - 03/07/13) and "Policy" (Anniv Date : 03/07/13, Employee : STEVEN). Below this is a "Transaction History" table with columns: Item No, Eff Date, Exp Date, Date Proces'd, Trans Eff Date, Premium Before, Trans Amount, and Premium After. The table contains several rows of transaction history data. A tooltip box with a red arrow points to the last row, which has "Endrs: -Add Vehicle" circled in red, containing the text: "Notice the type of change and the date it was processed".

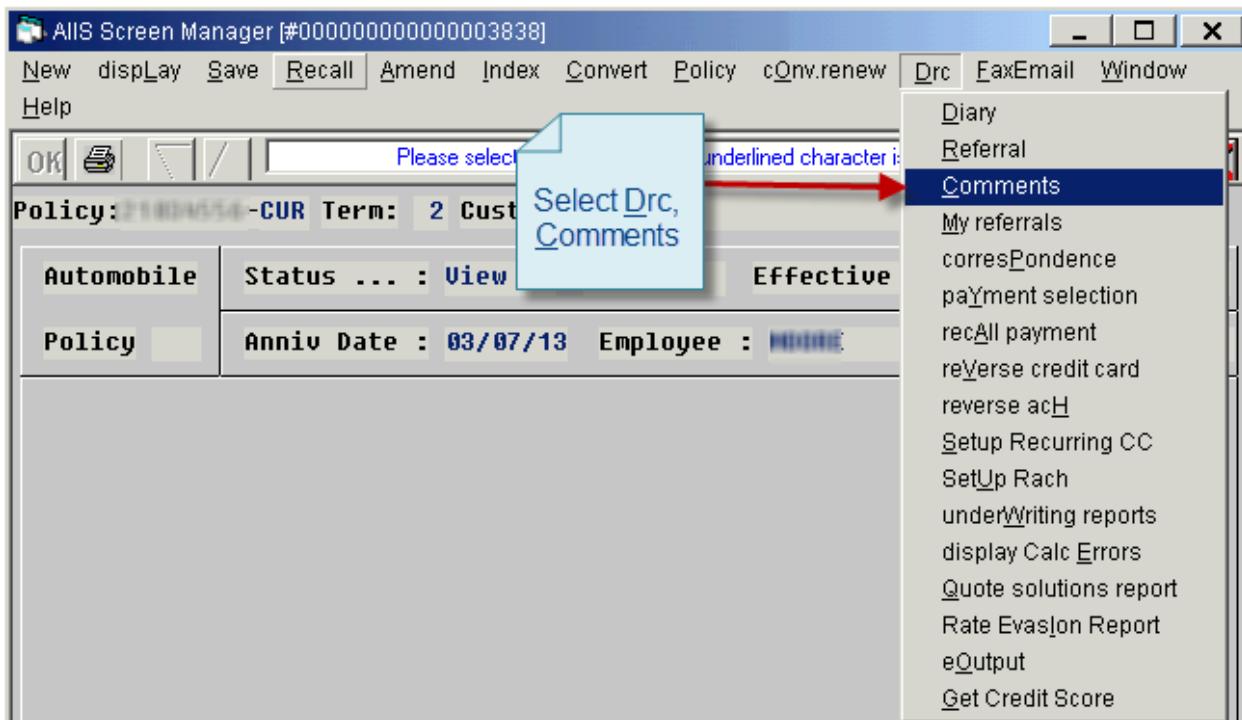
Item No	Eff Date	Exp Date	Date Proces'd	Trans Eff Date	Premium Before	Trans Amount	Premium After
7	9/07/12	3/07/13	2/20/13	2/20/13	1329.00	0.00	1329.00
Endrs:					User: JENKIN		
6	3/07/13			3/07/13	0.00	2282.00	2282.00
Renew:					User: JENKIN		
5	9/07/12	3/07/13	1/08/13	1/08/13	1329.00	0.00	1329.00
Iss Id Crd:	-ISSUE ID CARDS				User: JENKIN		
4	9/07/12	3/07/13	1/08/13	1/05/13	1150.00	179.00	1329.00
Endrs:	-Add Vehicle				User: JENKIN		



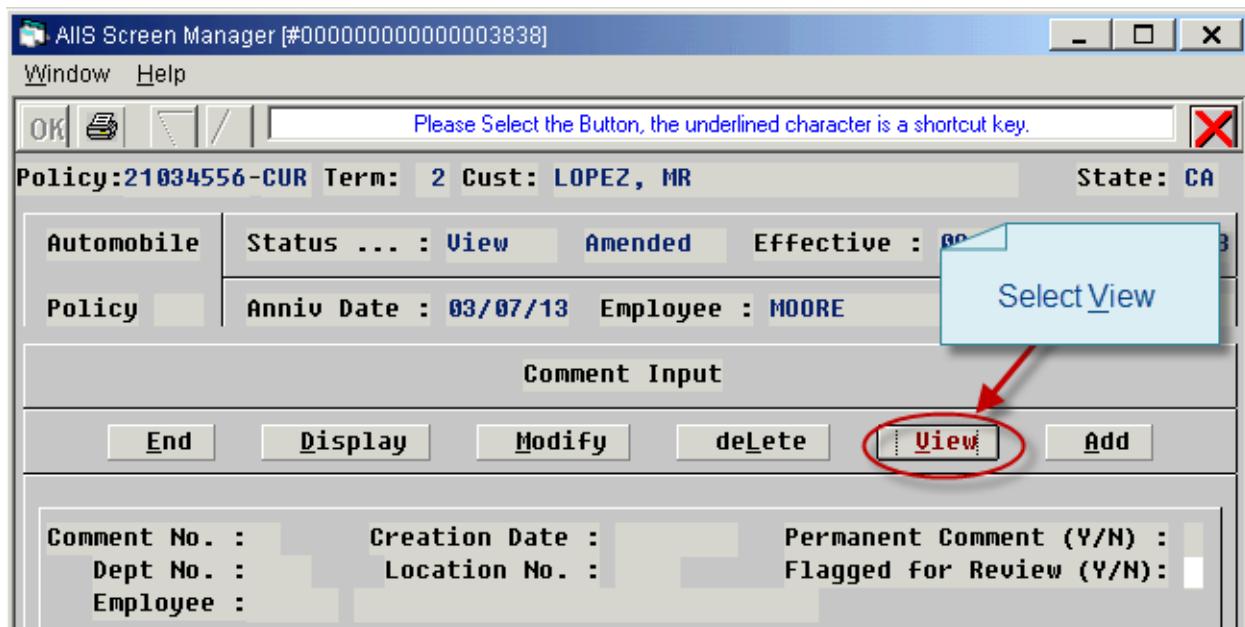
Once you select the “X”, select the X again to navigate to the “home” screen

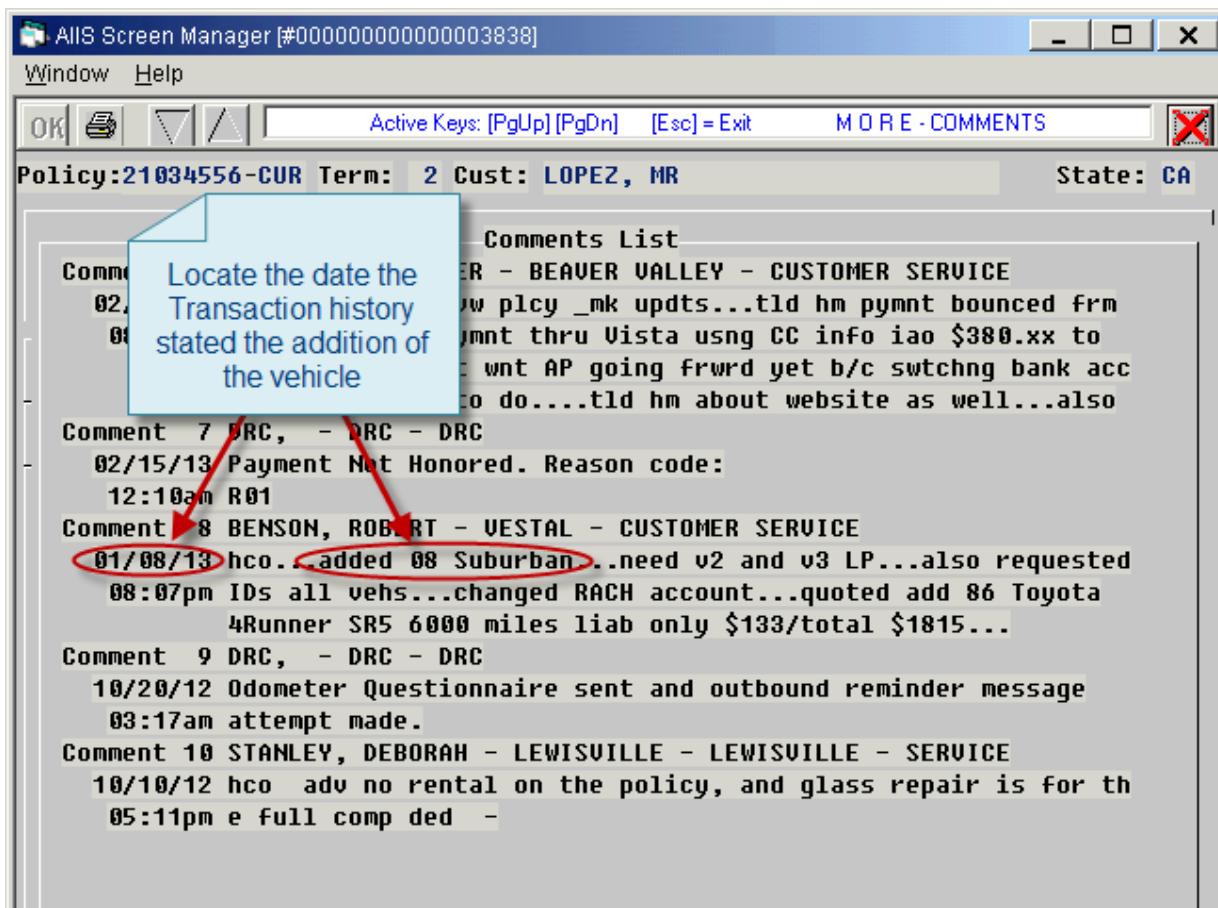


You will navigate to the comments screen



Select View to see the past comments.





If the vehicle you're looking for is not listed in the comments it is safe to say the vehicle was added the day the policy started.

You would then navigate back to the Transaction history to locate the new policy. If there is no more add/change vehicle listed.

Policy: 21034556-CUR Term: 2 Cust: LOPEZ, MR State: CA

Automobile Status ... : Contact Amended Effective : 09/07/12 - 03/07/13

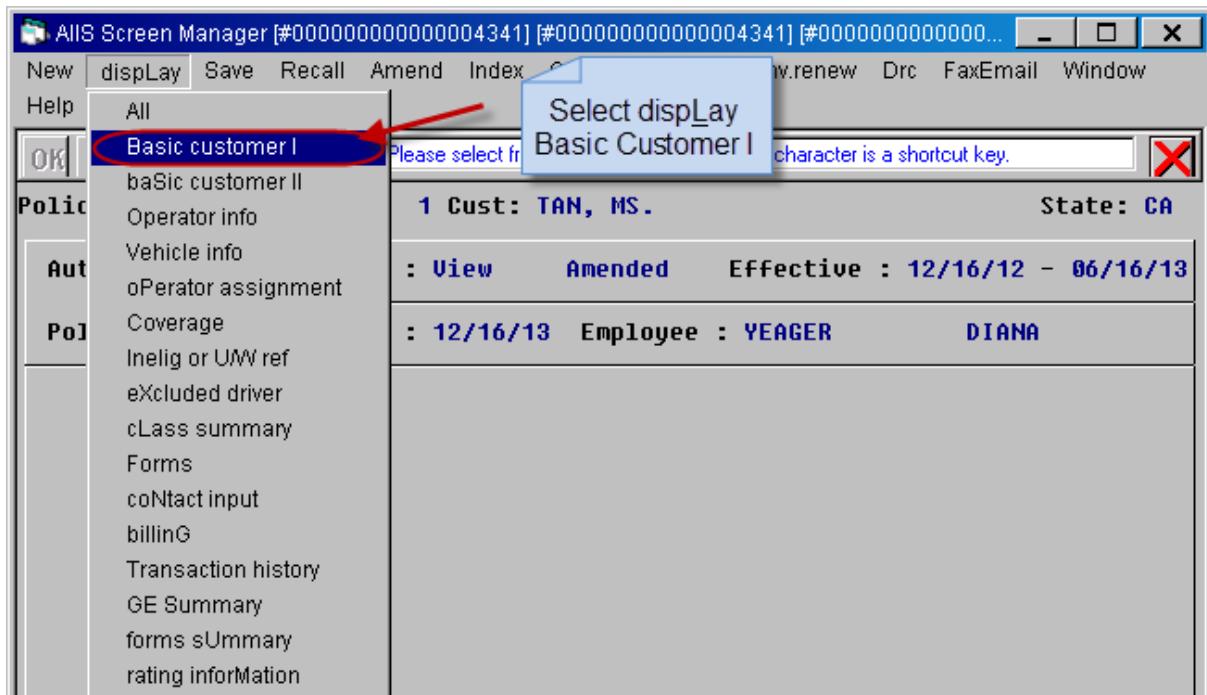
Policy Anniv Date : 03/07/13 Employee :

Transaction History (F4) verify trans.

Item No	EFF Date	Exp Date	Procес'd	Trans Eff Date	Premium Before	Trans Amount	Premium After
3	9/07/12	3/07/12	Renew: -RENEW	9/07/12	0.00	1150.00	1150.00
2	3/07/12	9/07/12	Endrs: -Change	3/07/12	838.00	48.00	886.00
1	3/07/12	9/07/12	New Pol: -NEW POLICY	3/07/12	0.00	838.00	838.00

## Agent's information:

To locate the information select dispLay Basic customer |

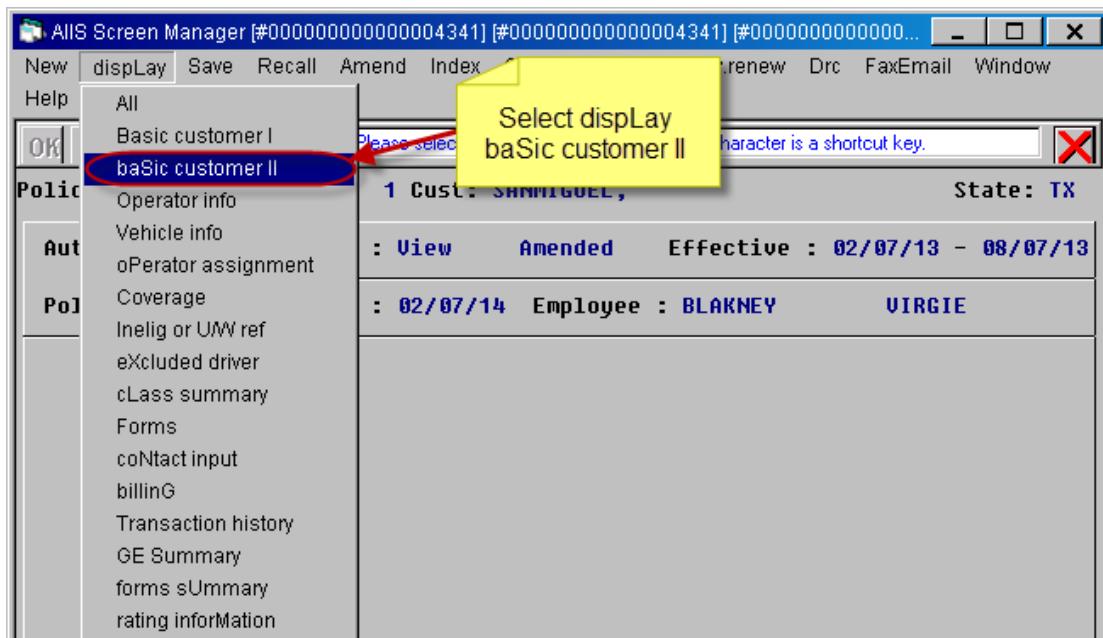


If an agent is listed on the policy they will be listed here. If they do not have an agent it will list as 21<sup>st</sup> CENTURY INSURANCE

This screenshot shows a detailed view of a policy record. At the top, it shows 'Status : View Amended Employee : CORTINAS DIANA'. Below that, policy details are listed: 'Policy No : 21347076CUR Effective Date : 12/16/12 Origin Date : 12/16/12', 'Tier Complete : Y Expiration Date : 06/16/13 Term : 6 MONTHS', and 'Market Key Code : CANCEL Account Number : 9372 Transfer : N', 'Svc Off # : 800-241-1188 Account Name : 21ST CENTURY INSURANCE', and 'Sub Agent # : Service Office : 21st CENTURY INSURANCE'. A red box highlights the 'Account Number : 9372' and 'Transfer : N' fields. Further down, it shows contact information: 'Title(f4) First Name M.I. Last Name' (MS. COLLEEN TAN), 'Additional Policy Name : N Third Party : N', 'Street : 8209 SANTA YNEZ ST', 'City : SAN GABRIEL', 'St (f4) : CA Zip : 91775-2473', 'Daytime Phone : (626) 287 - 9464 Ext : ', 'Evening Phone : ( ) - Ext : ', 'Best Time To Call (D/E/N) : E', 'Alternate Risk State : N (Y/N) Y', 'Risk State : Comments : N', 'Email: Paperless Y SendEmail : N ctan87@gmail.com', 'Registered Split KY', 'Online: Y Policy : N TAX : N', and 'Preferred Language E APS Policy No APS Convr Date'.

## Excluded drivers:

To locate the excluded drivers on the policy go to dispLay basic information II



In the lower left hand corner is a small box labeled Driver Excl. If there is an "N" in the box that means there are no excluded drivers. If there is a "Y" in the box, that means there is at least one excluded driver.

This screenshot shows the 'Basic Customer Input II' screen with several fields highlighted by red circles. The highlighted fields include 'Prior Carrier' (ZZC-GEICO), 'Prior Carrier Pay Plan' (6-PAY), 'Prior Carrier Days Lapsed' (0), 'Moved more than twice in the past 7 years (Y/N)' (N), 'GE Yrs at Res' (Channel), 'Resident Since Date', 'FINANCIAL SCORES Unstable (Y/N)' (Y), 'Score' (499), 'CBUS Score' (578), 'FBUS Score', 'Reason Codes' (25 97 31 96), 'Payment Plan Option' (6-PAY PLAN), 'Multi Products (Y/N)' (N), and 'Driver Excl' (Y). The 'Driver Excl' field is specifically circled with a red arrow pointing to it.

You can use the page down button on your keyboard (or the arrow buttons in the upper left hand corner of DRC) to page down. This will allow you to see the name of the excluded driver.

The screenshot shows a window titled "Alls Screen Manager" with three tabs at the top: "Policy", "Automobile", and "Status ...". The "Policy" tab is selected. The status bar at the bottom says "[PgUp] = Page Up, [PgDn] = Page Down, [ESC] = Exit".

Policy 2139987-CUR Term: 1 Cust: SAWYER, State: TX

Automobile      Status ... : View      Amended      Effective : 02/07/13 - 08/07/13

Policy      Anniv Date : 02/07/14      Employee : BLAKNEY      VIRGIE

**Basic Customer Input II**

Prior Carrier  : ZZZ-GEICO

Prior Carrier Pol No :  Prior Carrier Orig Date :

Prior Carrier Pay Plan : 6-PAY      Prior Bi  30/60

Prior Carrier Days Lapsed : 0      Days Cont Insured : 467

Prior Carrier Days Insured : 467

**Excluded Driver Input I**

First Name	MI	Last	Relation	Birth ED <input type="button" value="F"/>	Type Lic <input type="button" value="F"/>	Date <input type="button" value="F"/>	Reason <input type="button" value="F"/>	Y/N	
ROBIN		Jackson	CHILD	<input type="button" value="F"/>	<input type="button" value="F"/>	05/20/97	<input type="button" value="F"/>	ND	N
RGF Validation Dates <input type="button" value="F"/> : N									

DVR

## Section 6 – DRC Autopay - Updating Expired Credit Cards

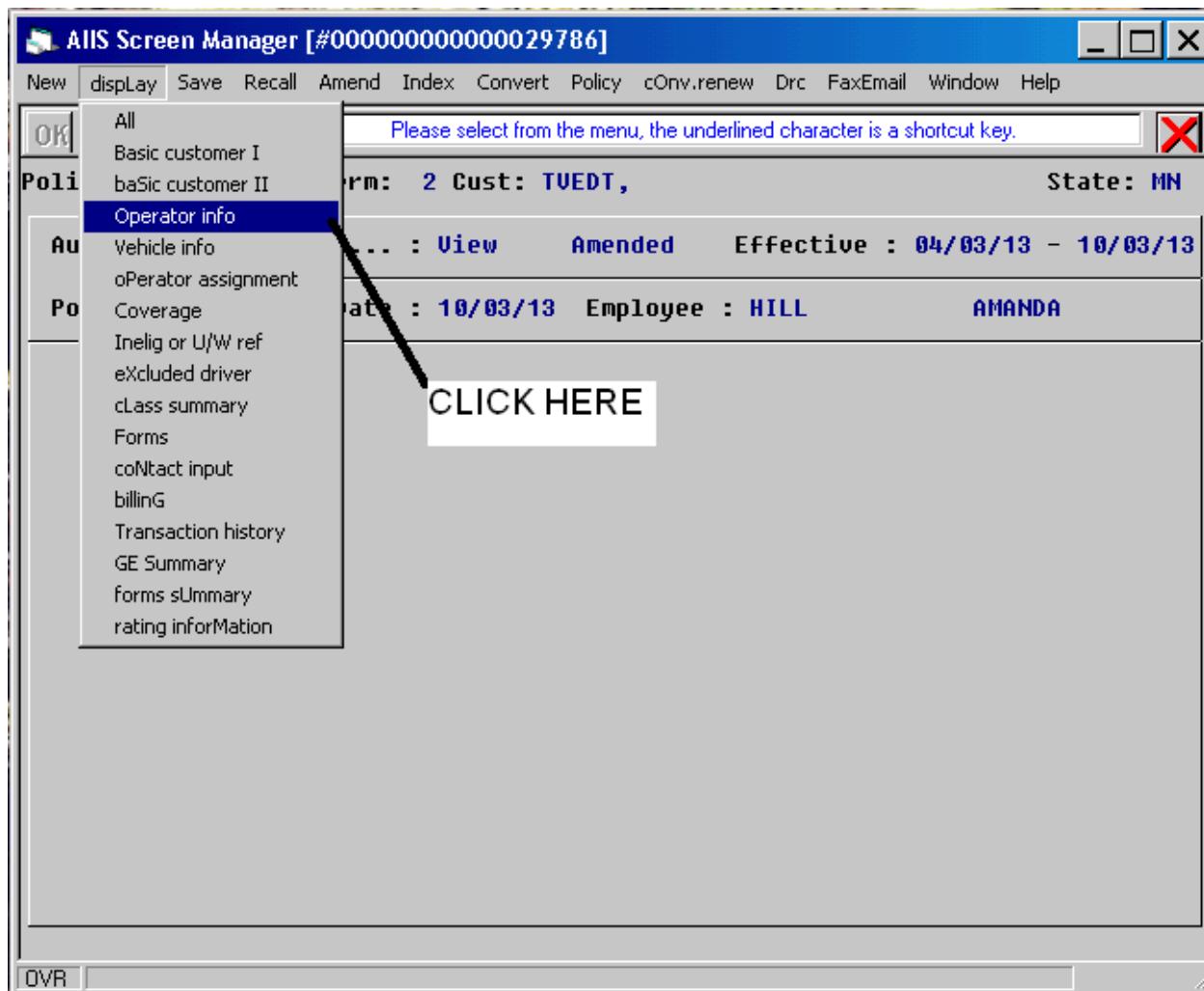
### Setup Recurring CC

Customer can use Visa, Mastercard, American Express and Discover to set up autopay, along with any debit card with a Visa or Mastercard logo.

Like many companies, 21st encourages their customers to sign up for automated payments via credit or debit card. 21st refers to this as autopay, more specifically RCC. When a credit or debit card is about to expire, the customer receives a letter from us prompting them to call with the new expiration date. Today we will learn how to update a policy with the new credit card information.

If the customer wants to be removed from RCC completely or wants to switch from RCC to recurring check (or has any other policy questions) please transfer the customer to 21st at 888 463-0138.

Verify the customer's policy by asking for their name and date of birth and verifying through "dispLay" "Operator Info" screen. Date of birth can be found by Displaying the Operator Info screen.



Next...

1. Verify by asking for their name and date of birth.
2. If the customer's refuses to verify DOB then you man verify name and address.

All Screen Manager [#000000000000000029786]

Window Help

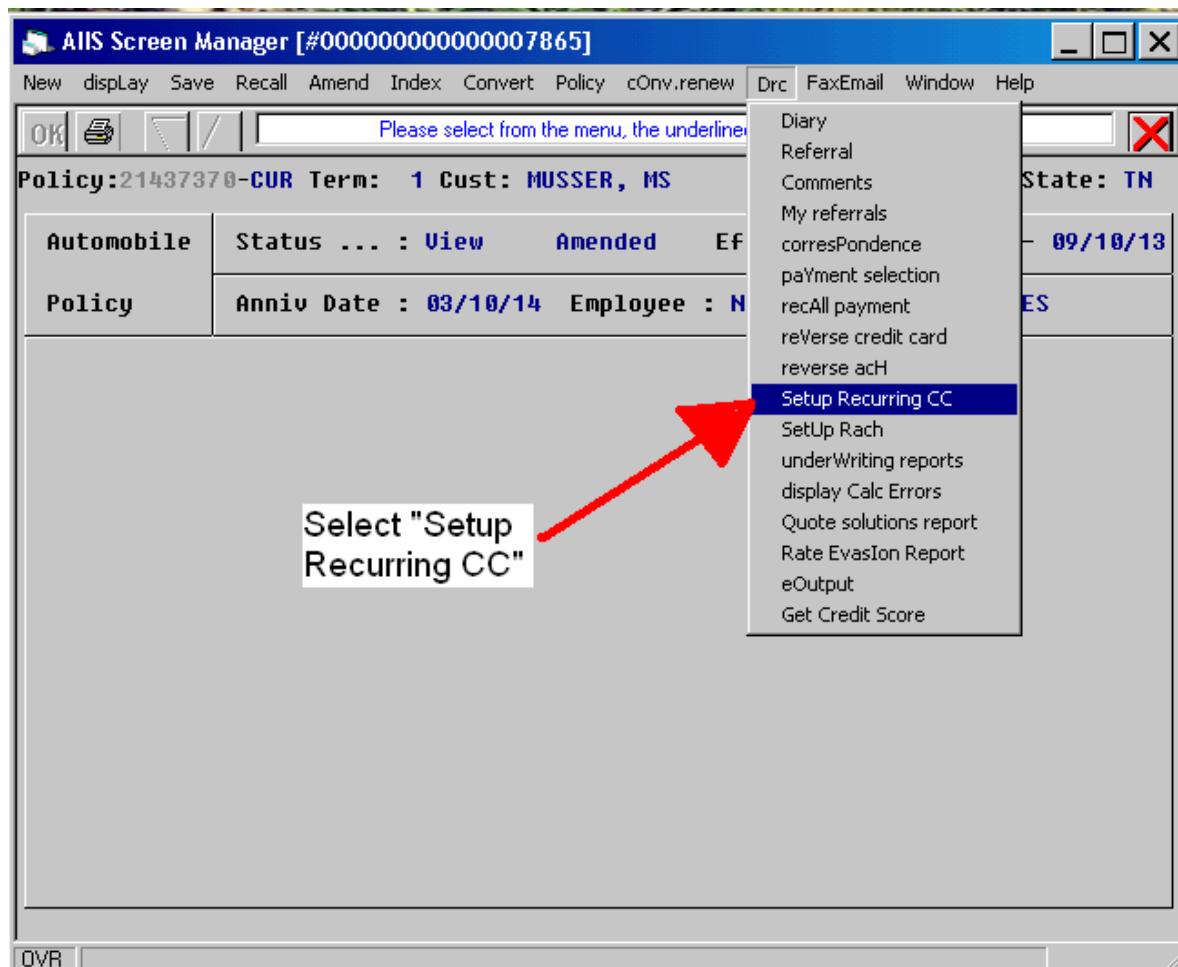
[PgUp] = Page Up, [PgDn] = Page Down, [ESC] = Exit

Policy:21270521-CUR Term: 2 Eff-Exp:04/03/13-10/03/13 TUEDT,

MINNESOTA Driver # 1	
First Name	RENAE
M.I.	
Last Name	TUEDT
Relation (F4)	CUSTOMER
Birthdate	12/07/87
Age Licensed	16
Gender (M/F)	F
Marital St(F4)	PARTED(SEPARATED)
Away At School >100 miles Y/N	N
*Occupation	MILITARY
Foreign Lic (Y/N) :	N Unverified
Retired (Y/N)	Driv Record:N
*Education (F4)	WITH EDUCATION
Lic <= 3 yrs ?	N
Date Licensed	12/07/03
Lic. State(F4)	MN
License Number	M733183384313
*Accidents or Comp Losses : N	
*Violations : N UW Reports : Y	
*Financial Responsibility : N *Discounts : Y Comments : N	

OVR

Once you have verified the customer's policy access the DRC menu and select Setup Recurring CC. This menu option will allow the user to update current credit/debit card information (such as an expiration date) or remove a customer from recurring set up.



## Setting Up RCC Screen

First, let's begin by reviewing the Set Up RCC screen. The first three segments of the screen has some basic customer information. The top segment displays the customer's name and address on the left and the policy expiration date and policy number on the right.

The second segment contains billing information, the left hand side display current bill owed and right hand side displays last payment made.

The third segment also displays billing information; payment plan, total policy balance, billing cycle and payment method. The payment method indicates if the customer is on an autopay plan or not. In this screen example, we can see that this customer is currently set up on RCC or recurring credit/debit card.

The lower half of the screen holds the information for the set up of autopay on a credit/debit card. Take special note of the sentence at the very bottom of the screen, this indicates the next due date and amount.

Name	Customer's Name		Status	Renewal	
	CORDOVA, TN 38018		Policy Period	3/23/2013 - 9/23/2013	
Phone (Home)			Policy Number	AUTO V1STA	
			Account	(8904) TENNESSEE DRIVERS	
			Phone (Work)		
Current Bill Date	3/27/2013	Last Payment Received Date	3/23/2013		
Current Payment Due Date	5/22/2013	Last Payment Received Amount	-522.18		
Current Payment Due Amount	262.08				
Bill Type	RFI TWO PAY	Balance	262.08	Cycle	INSTALLMENT BILLING
Term Comm	0.00	Comm Paid	0.00	Comm Due	0.00
Payment Method	RCC	Next Deduction Date	5/22/2013		
 Payment Plan : DIRECT BILL Pay Plan Option : RFI TWO PAY Payment Method : <input type="button" value="RCC"/> <input type="button" value="Setup Recurring Credit Card"/>					
Credit Card Number <input type="button" value=""/>		Credit Card Type : <input type="button" value="VISA"/>			
Expiration Date (MM/YYYY) : <input type="button" value="7"/> / <input type="button" value="2014"/>		Auth. Method : <input type="button" value="VERBAL"/>			
 Card Holder (First Name, M.I., Last Name) : <input type="text" value="Customer's"/> <input type="checkbox"/> <input type="text" value="Name"/> <input type="button" value=""/> Street : <input type="text" value="100 Main St"/> <input type="button" value=""/> City : <input type="text" value="CORDOVA"/> State : <input type="button" value="TN"/> Zip Code : <input type="text" value="38018"/> <input type="button" value=""/> Activation Date : <input type="text" value="9/1/2011"/> Next Due Date : <input type="text" value="5/22/2013"/> Deduction Day of Month : <input type="checkbox"/> <input button"="" type="button" value=""/>					
 Deduction of \$ 262.08 will be taken on 5/22/2013 for CURRENT installment 2					
 <input type="button" value="Submit"/> <input type="button" value="Cancel"/>					

## Updating Expiration Date

If a customer is currently on RCC and only needs to update the expiration date...

1. Verify the last four digits of the card number.
2. Then type over the existing expiration date
3. Click "Submit" in the lower right corner. There is no need to "Save" this change. Clicking on submit will save the changes.

**IMPORTANT NOTE:** It's important that we not change any other information if we are only updating the expiration date.

Name	Customer's Name CORDOVA, TN 38018	Status Policy Period Policy Number Account	Renewal 3/23/2013 - 9/23/2013 AUTO V1STA (8904) TENNESSEE DRIVERS
Phone (Home)	Phone (Work)		
Current Bill Date	3/27/2013	Last Payment Received Date	3/23/2013
Current Payment Due Date	5/22/2013	Last Payment Received Amount	-522.18
Current Payment Due Amount	262.08		
Bill Type	RFI TWO PAY	Balance	<b>262.08</b>
Term Comm	0.00	Comm Paid	0.00
Payment Method	RCC	Next Deduction Date	5/22/2013
Cycle Comm Due 0.00      INSTALLMENT BILLING			
 <b>Payment Plan : DIRECT BILL    Pay Plan Option : RFI TWO PAY</b> Payment Method : <b>RCC</b> <input type="button" value="▼"/>			
<b>Setup Recurring Credit Card</b>			
Credit Card Number <input type="button" value="📁"/> :	xxxxxx ####		
Expiration Date (MM/YYYY) :	<input type="text" value="7"/> / <input type="text" value="2014"/>	Credit Card Type :	<b>VISA</b>
		Auth. Method : <b>VERBAL</b> <input type="button" value="▼"/>	
<b>Card Holder (First Name, M.I., Last Name) :</b>			
Customer's <input type="button" value="📁"/> <input type="checkbox"/>	Name <input type="button" value="📁"/>		
Street :	100 Main St		
City :	CORDOVA		
State :	TN <input type="button" value="▼"/>	Zip Code :	38018 <input type="button" value="▼"/>
Activation Date :	9/1/2011      Next Due Date : 5/22/2013		
Deduction Day of Month :	<input type="checkbox"/>	View Schedule : <input type="button" value="📁"/>	
Deduction of \$ 262.08 will be taken on 5/22/2013 for CURRENT installment 2			
<input type="button" value="Submit"/> <input type="checkbox"/> <input type="button" value="Cancel"/>			

## Changing Cards

If the customer wants to change the credit/debit card they use for autopay, the user will still access the Setting up Recurring Screen.

Then enter the new card information directly over the existing card information, including the new expiration date. Please be sure to update the name as it appears on the card and the billing address.

We do not allow third parties to use their credit/debit cards for our customer's autopay.

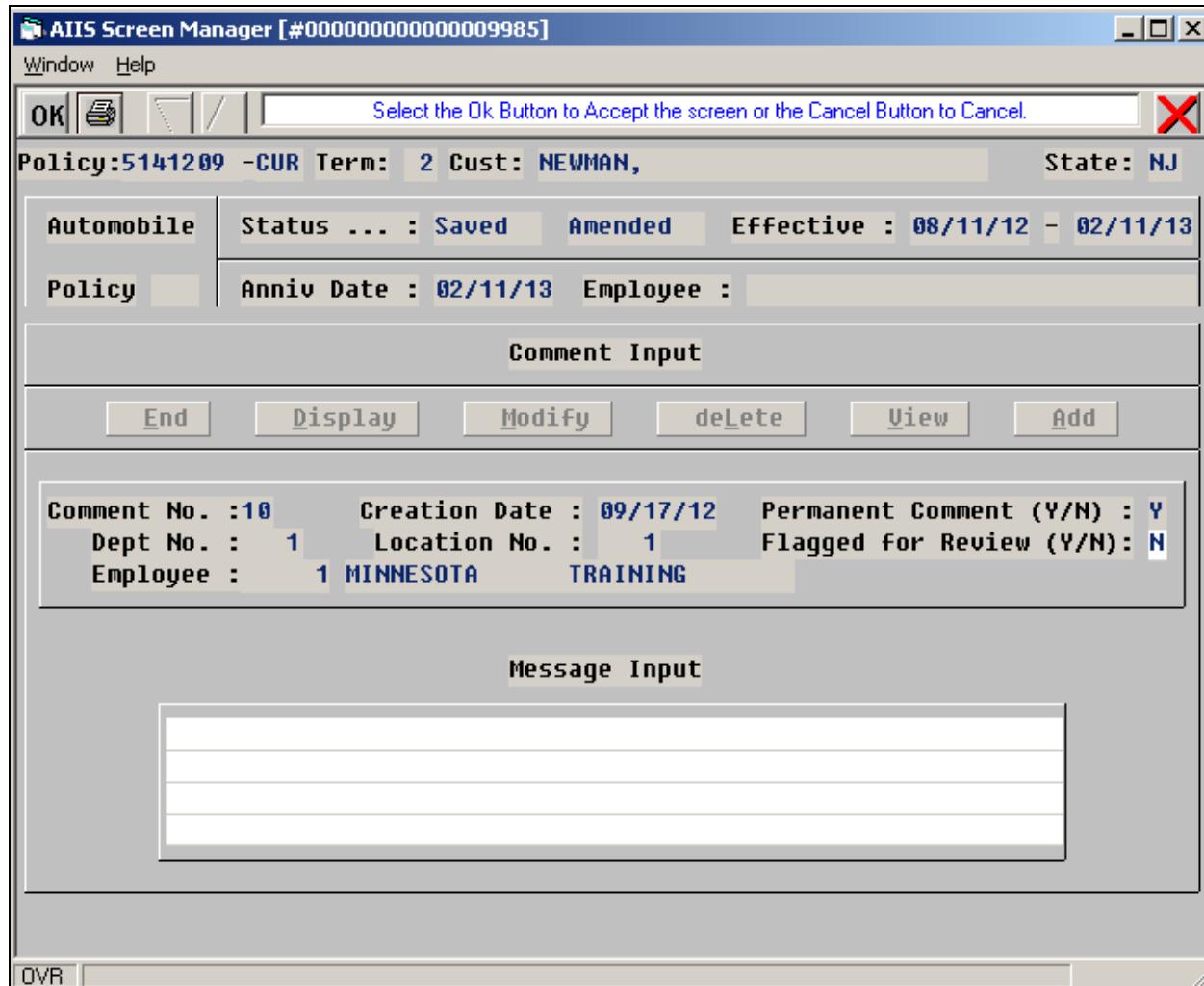
The card holder **must** be a person on the policy.

Once the new card information is entered, click "Submit" to save the changes.

Name	Customer's Name CORDOVA, TN 38018	Status Policy Period Policy Number Account Phone (Work)	Renewal 3/23/2013 - 9/23/2013 AUTO V1STA (8904) TENNESSEE DRIVERS
Phone (Home)			
Current Bill Date	3/27/2013	Last Payment Received Date	3/23/2013
Current Payment Due Date	5/22/2013	Last Payment Received Amount	-522.18
Current Payment Due Amount	262.08		
Bill Type	RFI TWO PAY	Balance	<b>262.08</b>
Term Comm	0.00	Comm Paid	0.00
Payment Method	RCC	Next Deduction Date	5/22/2013
INSTALLMENT BILLING			
Payment Plan : DIRECT BILL Pay Plan Option : RFI TWO PAY			
Payment Method : RCC			
Setup Recurring Credit Card			
Credit Card Number <input type="text"/> [XXXXXX-XXXX-XXXX-####]		Credit Card Type : <input type="text"/> VISA	
Expiration Date (MM/YYYY) : <input type="text"/> / <input type="text"/> 2014		Auth. Method : <input type="text"/> VERBAL	
Card Holder (First Name, M.I., Last Name) :			
Customer's	<input type="checkbox"/>	Name	<input type="text"/>
Street:	<input type="text"/> 100 Main St		
City:	<input type="text"/> CORDOVA		
State:	<input type="text"/> TN	Zip Code :	<input type="text"/> 38018
Activation Date :	<input type="text"/> 9/1/2011		
Deduction Day of Month :	<input type="checkbox"/>		
Next Due Date : <input type="text"/> 5/22/2013			
View Schedule : <input type="text"/>			
Deduction of \$ 262.08 will be taken on 5/22/2013 for CURRENT installment 2			
		Submit	Cancel

## Adding Comments

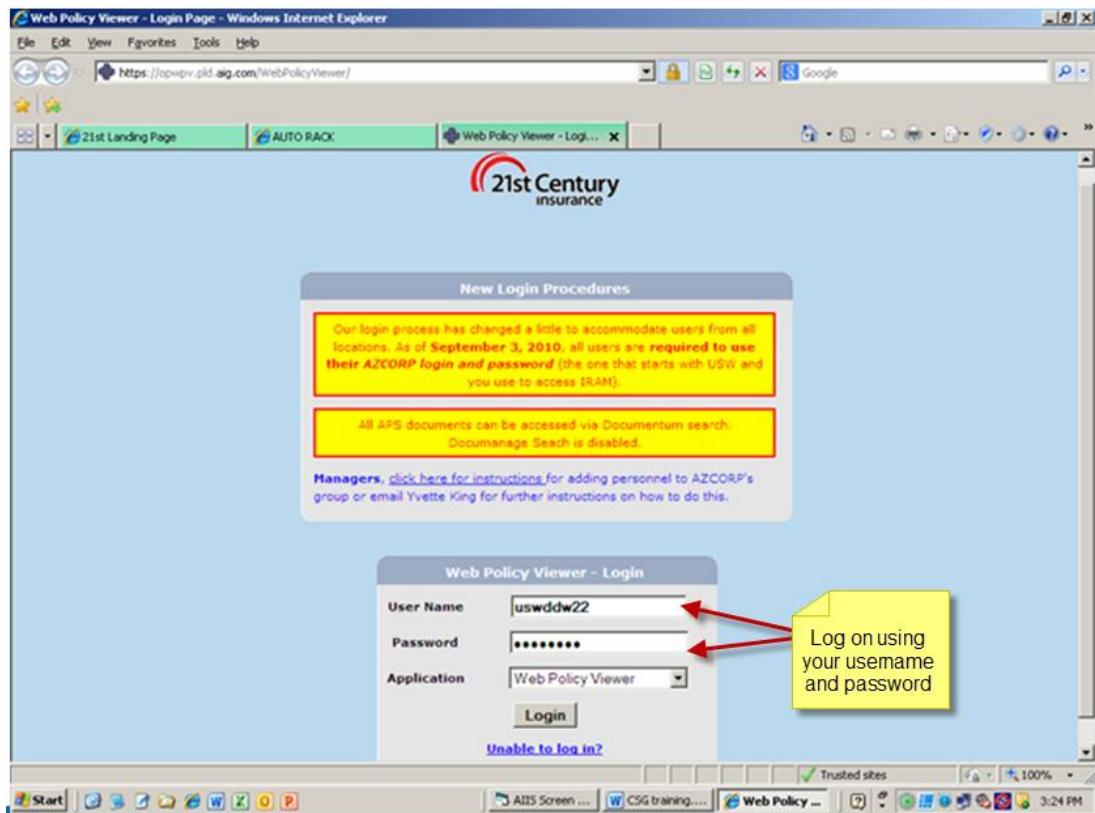
It is important to leave clear notes as to the changes you made to the policy. For example, when updating an expiration date for autopay the entry can be "Updated expiration date for RCC."



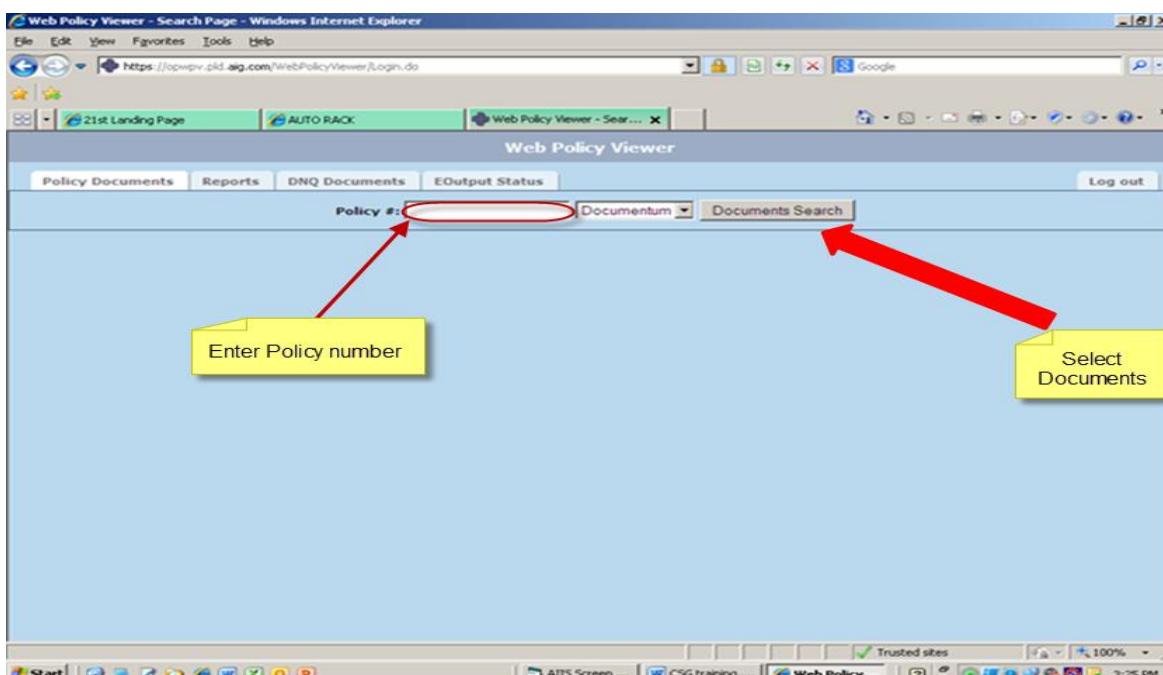
## Section 7 – Web Policy Viewer (Image System)

Access the Image System using the link: <https://opwpv.pld.aig.com/WebPolicyViewer/> will bring up login screen.

You will be required to use your AZCORP login and password.



After login, enter policy number then search.



The search will return all documents pertaining to that policy number. At this point any particular document can be viewed to verify receipt, policy change, etc.

NOTE: Select desired document from list (DECA – amended declaration page, DECR – renewal declaration page, DECN – new declaration page, REIA – addn'l insured reinstatement notice, REIL – loss payee reinstatement notice, REIN – reinstatement declaration) to view / fax.

**Web Policy Viewer**

Policy Documents | Reports | DNQ Documents | EOutput Status | Log out

Policy #:  Documentum

Select the desired documents to be faxed

Search Results					
	DOCUMENT NAME	DOCUMENT TYPE	AUTHOR	CREATION DATE	MODIFIED DATE
<input checked="" type="checkbox"/>	<a href="#">06580116 VOL OB RN DEC 12092012121020120418 01.pdf</a>	RN	opsimport	2012/12/10 08:01:00 EST	2012/12/10 08:01:00 EST
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If the Policy number has more than three vehicles on the policy make sure to scroll down to look for any additional vehicles listed on the policy

Notice the difference between the pages listed on the pdf and the menu

PERSONAL AUTO  
POLICY DECLARATION

AMEND - POLICY CHANGE  
EFFECTIVE 02/25/13

Account:  
21ST CENTURY INSURANCE

Customer Service Center:  
21st CENTURY INSURANCE  
21ST CENTURY PLAZA  
P.O. BOX 15510  
WILMINGTON, DE 19850-5510

Policy No: #343 88 78  
Policy Period: From 10/01/12  
To: 04/01/13 12:01 AM Standard Time

Vehicle(s) and Driver(s)								
Veh	Year	Make/Model	Vehicle ID Number	Use	Vehicle Discounts/Comments		Zip	Mileage
1	00	FORD TAURUS SES	1FAPPS5S6YQ281854	W	MCDIGD		91356	9,499
2	07	ACURA TL TYPE-S	19UUA76507A037479	W	MCDIGD		91356	10,000
3	05	LNDR LR3	1A1AAJ25465A109555	P	MCDIGD	ADDITIONAL VEH	91356	5,499

Veh	Rated Driver	Years Licensed	Tickets	Chargeable Accidents	Driver Discounts
1	FRED FISHER	38	0		GDD\SD5
2	JANICE SILVER	43	0		GDD\SD5

Scroll down on the pdf to view the other vehicle's listed on the policy

Page 2 of 2

**PERSONAL AUTO POLICY DECLARATION**

AMEND - POLICY CHANGE  
EFFECTIVE 02/25/13

**Account:**  
21ST CENTURY INSURANCE

**Customer Service Center:**  
21st CENTURY INSURANCE  
21ST CENTURY PLAZA  
P.O. BOX 15510  
WILMINGTON, DE 19850-5510

Policy No: 8343 83 72  
Policy Period: From 10/01/12  
To: 04/01/13 12:01 AM Standard Time

Vehicle(s) and Driver(s)								
Veh	Year	Make/Model	Vehicle ID Number	Use	Vehicle Discounts/Comments		Zip	Mileage
4	11	PORSCHE 911 CARRERA2S/4S/GTS	WP0AC2A310F723814	P	MCDIGD	ADDITIONAL VEH	91356	2,500
Veh	Rated Driver			Years Licensed	Tickets	Chargeable Accidents	Driver Discounts	