

CL Endorsements

Jack Bradley: CL Endorsements

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WEST BENGAL

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Marble Box and JBA Collaboration Index

Existing Policy Management

1. Non-Download Policies Past Expiration Date Personal & Commercial Lines
2. Remarketing Personal Lines
3. Endorsement Checking Personal and Commercial Lines



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Revision History

Version	Revision Date	Description	Maker	Reviewer	Approver (Agency)
1.0	18/4/2023	CL Endorsement	Asmita Das	Operations Excellence Team	-



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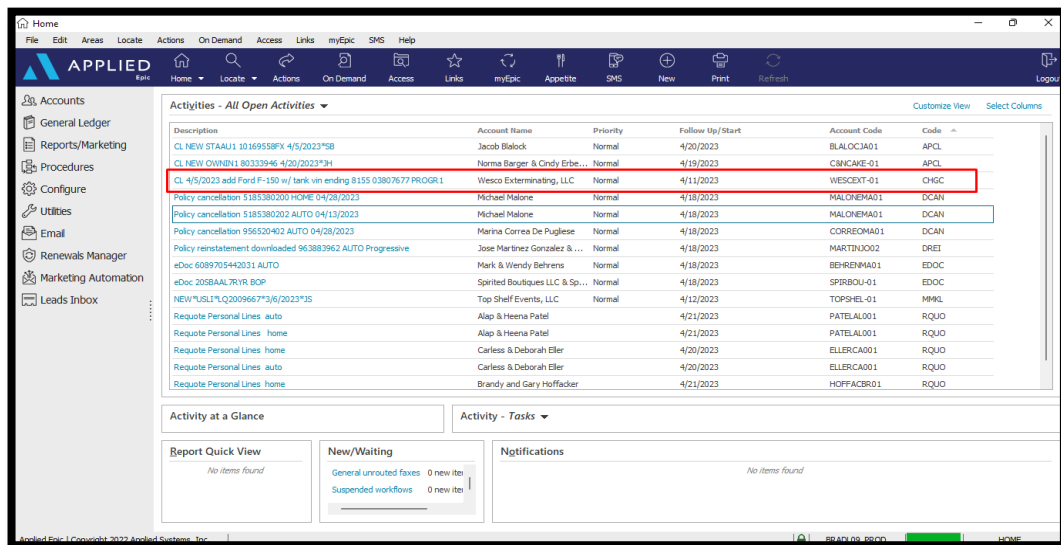
Overview: -

Change request processed by agencies are assigned to Marble Box for follow up and verify if the change has downloaded yet and the same needs to be exact as per the change request document.

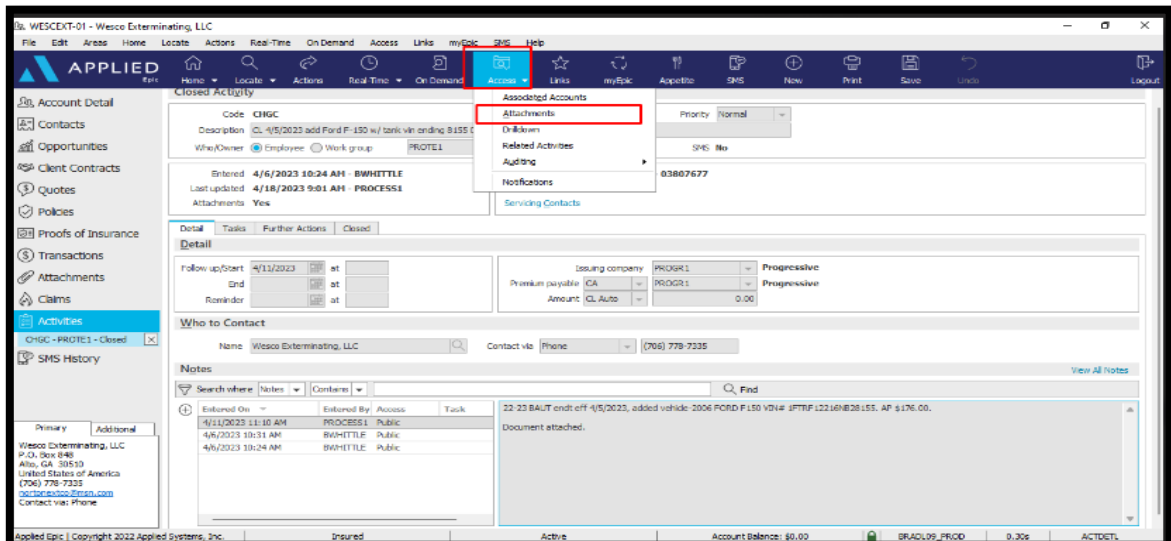
TAT for this Task: - 48

1. Agency will assign a CHGC activity to MB to process the endorsement.

CHGC Activity in EPIC



2. Open the CHGC activity and go to the attachment screen (Access → Attachment) to pull the change request form. If there is no change form, then copy the change detail mentioned in the activity note section in a notepad to check change accuracy with EPIC and endorsement document.





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CHGC Activity

Activity Details:

- Code:** CHGC
- Description:** CL 4/5/2023 add Ford F-150 w/ tank vin ending 8155 03807677 PROGR1
- Who/Owner:** Employee (PROTE1) - Processing Team1
- Entered:** 4/6/2023 10:24 AM - BWHTTLE
- Last updated:** 4/18/2023 9:01 AM - PROCESS1
- Association:** Policy - BAUT - 03807677
- Line ID:** Servicing Contacts

Who to Contact: Wesco Exterminating, LLC (Phone: (706) 778-7335)

Notes:

- 4/11/2023 11:10 AM PROCESS1 Public
- 4/9/2023 10:31 AM BWHTTLE Public
- 4/9/2023 10:24 AM BWHTTLE Public

Activity Log:

- Entered On: 4/11/2023 11:10 AM, Entered By: PROCESS1, Access: Public, Task: Commercial auto endorse
- Requestor Name: insured emailed via
- Requestor Email: [redacted]
- Date Change Taken: 04.05.23
- Effective Date of Change: 04.05.23
- Has this change been confirmed with the Named Insured: Yes
- Basic Description: Add
- Other Change: Add
- Add vehicle: [redacted]

3. Now go to the policy screen and select the appropriate policy. Confirm whether the endorsement has been downloaded or not from the service summary.

Policies - Current/Renewed:

Line	Status	Description	Effective	Expiration	Policy Number	Bill	ICD	Policy Description
BAUT	Renewal		6/2/2022	6/2/2023	03807677	D	PROGR1	Commercial Auto
BAUT	Renewal		6/2/2023	6/2/2024	03807677	D	PROGR1	Commercial Auto

Service Summary:

#	Entered	Action	Description	Stage	Effective	Stage Changed
2	04/06/2023	Endorse/Renewal	Add Ford F-150 w/ tank vin ending 8155	Issued	4/5/2023	04/05/2023
1	04/14/2022	Renew	Renewal Quote	Issued	6/2/2022	05/31/2022

4. If the endorsement has been downloaded, below are the details that we need to check.

- Policy term
- Endorsement effective date
- Changes in the policy
- Any additional or return premium.



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5. We need to make a note and close the activity.

Detail Tasks Further Actions Closed

Detail

Follow up/Start 4/11/2023 at Issuing company PROGR1 Progressive
End at Premium payable CA PROGR1 Progressive
Reminder at Amount CL Auto 0.00

Who to Contact

Name Wesco Exterminating, LLC Contact via Phone (706) 778-7335

Notes

Entered On	Entered By	Access	Task
4/11/2023 11:10 AM	PROCESS1	Public	
4/6/2023 10:31 AM	BWHITTLE	Public	
4/6/2023 10:24 AM	BWHITTLE	Public	

22-23 BAUT endt eff 4/5/2023, added vehicle-2006 FORD F150 VIN# 1FTRF12216N828155. AP \$176.00.
Document attached.

Account Balance: \$0.00 BRAD09_PROD 0.30s ACTDEL

6. If the endorsement is not downloaded, then we need to extend the follow-up date for the next 30 days along with a note.

Add a Note

Access level Public

Endorsement is not downloaded yet; hence the follow-up date has been extended for the next 30 days.

Finish Cancel

7. On the follow-up day, if the endorsement doesn't download (Current & Renewal term), then we need to add a note to the CHGC activity and switch back the activity to the CSR (Brooke Whittle) on the same day.

Add a Note

Access level Public

Please note that the endorsement is not downloaded yet.

Finish Cancel

0.57s | ACTNOTE



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Open Activity

Code: CHGC Priority: Normal

Description: CL 4/5/2023 add Ford F-150 w/ tank vin ending 8155 03807677 PROGR1

Who/Owner: Employee Work group WHIAD1 Brooke Whittle SMS No

Entered: 4/6/2023 10:24 AM - BWHITTLE Association: Policy - BAUT - 03807677

Last updated: 4/18/2023 8:58 AM - PROCESS1 Line ID

Attachments: Yes Servicing Contacts

Detail Tasks Further Actions

Detail

Follow up/Start: 4/11/2023 at

End at

Reminder at

Issuing company: PROGR1 Progressive

Premium payable: CA PROGR1 Progressive

Amount: CL Auto 0.00

Who to Contact

If there is anything that needs to be notified, then keep it open to Brooke Whittle and set the follow-up date on the same day.
Note with mismatches.

Add a Note

Access level: Public

22-23 BAUT endt eff 4/5/2023, added vehicle-2006 FORD F150 VIN# 1FTRF12216NB28155. AP \$176.00.
Document attached.
Please note, uninsured motorists property damage deductible \$250 has not been downloaded in epic.

Finish Cancel

0.56s | ACTNOTE

- There will be no change request for some changes like "Paid in full discount". In that case, we do not need to notify
- Make sure EPIC matches as per the endorsement document. If it doesn't match, then also notify Brooke through activity



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Note: If the Change is downloaded in the most recent renewal term. Then the CHGC activity must be closed for both the recent renewal term and the current term.

In most cases, if the change effective date is close to the Renewal term, then the change will download to the Renewal term only.

Shown in the below images for reference – Change Downloaded in recent Renewal term 22-23 but showing as a Submitted stage in 21-22 term.

The screenshot shows the APPLIED software interface. The top navigation bar includes 'File', 'Edit', 'Areas', 'Home', 'Locate', 'Actions', 'Real-Time', 'On Demand', 'Access', 'Links', 'myEpic', 'SMS', and 'Help'. The main content area displays a table of policies with columns for Line, Status, Description, Effective, Expiration, Policy Number, Bill, ICO, Policy Description, and Policy Downloaded Price. A red box highlights the 'AUTO' policy line with a 'Renewal' status and an effective date of 10/15/2021. Below the table, the 'Policy Detail' section shows 'Contracted' information for 'AUTO - Personal Automobile' and 'Line Detail' for 'Direct' billing to 'Client - Reginald and Sonya Hix'. The 'Service Summary' table at the bottom shows a row with a 'Submitted' stage for a change on 09/29/2022, which is highlighted with a red box.

This screenshot is similar to the first one, showing the same policy list and details for the 'AUTO' policy. However, the 'Service Summary' table at the bottom shows a different change record. A red box highlights a row with a 'Submitted' stage for a change on 09/29/2022, which is highlighted with a red box. The 'Effective' date in this row is 10/15/2022, and the 'Stage' is 'Submitted'.