

CL Endorsements

Jack Bradley: CL Endorsements

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ADDRESS: TIRUMALA BUILDING 22, EAST TOPSIA ROAD, KOLKATA – 700046 WEST BENGAL



Marble Box and JBA Collaboration

Existing Policy Management

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



Revision History

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



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

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 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.

Bg. WESCEXT-01 - Wesco Extermina	ating, LLC				- 0	×				
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<u>ഹ</u> Opportunities	Who/Owner Employee Work group PROTE1	Related Activities	SMS No							
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Activities	Who to Contact									
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Primary Additional	4/6/2023 10:31 AM BWHITTLE Public	Document attached.								
Wesco Externinating, LLC P.O. Box 848	4/6/2023 10:24 AM BWHETTLE Public									
Alto, GA 30510 Lipited States of America										
(706) 778-7335										
Contact via: Phone										
						I				
Applied Epic Copyright 2022 Applied	Systems, Inc. Insured	Active	Account Balance: \$0.00	BRADL09_PRO	OD 0.30s ACTDE	n.				



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CHGC Activity

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윤, Account Detai 윤, Contacts ഹ্রা Opportunities	Closed Actignty Priority Normal * Gode CHIGC Priority Normal * Description CL 4/\$2223.add Fand F-150 w/ tank via ending 8155 03807877 PR.OR.1 * Who/Overrar @Employee Work group PROTE1 *
459 Client Contracts ③ Quotes ② Policies	Entered 4/6/2023 10:24 AM - BWHITTLE Association Policy - BAUT - 03607677 Lest updated 4/18/2023 9:01 AM - PROCESS1 Line ID Attachments Yes Set vicing Contacts
Proofs of Insurance Transactions	Detai Tasis Ruther Actions Closed Detail
 Attachments Claims 	Follow up/Start 4/11/2023 at Tssuing company FPROGREI Company Progressive Beninder Sim Premum payable CA Progressive Progressive Reminder Sim Amount CL Auto V Progressive
CHGC - PROTE 1 - Closed X	Who to Contact Name Wesco Exterminating, ILC Contact via Phone + (706) 778-7335
	Notes v ♥ Serve where Notes v Contains v ♥ Serve days and the serve of the ser
Primary Additoreal Wesco Externmethog, LLC P.O., Box 848 Altos, GA 30510 Linited States of America (706) 778-7305.com Contrainestoo Emerican Contrainestoo Emerican	(c) Listored On * Entered by Access Task, 4/11/2021 11:0 AM PROCIDSE Hubic Name Tools also Crampe Brode 4/0/2021 10:1 AM 9V/HITTLE Public Requestor Phone Name Brode 4/0/2021 10:24 AM 9V/HITTLE Public Requestor Phone Name Requestor Phone Name 4/0/2023 10:24 AM 9V/HITTLE Public Requestor Phone Name Requestor Phone Name 2 Brode Requestor Phone Name Brode 2 Brode Requestor Phone Name Requestor Phone Name 2 Brode Requestor Phone Name Brode 2 Brode Brode Requestor Phone Name Brode 3 Brode Brode Brode Brode Brode 3 Brode Brode Brode Brode Brode 3 Brode Brode Brode Brode Brode 4

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.

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윤 Contacts	Search where				Q Fin	hd					
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ASP Client Contracts	BAUT	Renewal	6/2/202	3 6	/2/2024	03807677			D PRO	R1 Co	mmercial Auto
(Quotes						L					
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Primary Additional											
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Alto, GA 30510 United States of America	# Entered	Action	Description					Stage	Effectiv	na i	Stage Changed
(706) 778-7335 nortonextco@msn.com Contact via: Phone	2 04/06/2 1 04/14/2	023 Endorse/Re 022 Renew	add Ford F-150 w/ 1 Renewal Quote	ank vin ending 81	155			Issued	4/5/202	23	04/10/2023 05/31/2022
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- 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		٠									
	<u>D</u> etail											
	Follow up/Start 4/11/2023 at		Issuing company PR Premium payable CA + PR Amount CL Auto +	OGR1 v OGR1 v OGR1 v OGR1 v								
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lied S	Systems, Inc. Insured		Active	Account Balance: \$0.00	BRADL09_PROD	0.30s	ACTDETL					

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.

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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				×
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Please note that	: the endorsement	is not downloaded yet.		^
			 Finish	Cancel
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Open Activity								
Code	СНБС				Priority	Normal	,	•
Description	CL 4/5/2023 add Ford F-150 w/ tank vin ending 8155 03807677 PROGR1							
Who/Owner	● Employee 🔵 Work group 🛛 🛛 👻	Brooke Whittle			SMS	No		
Entered	4/6/2023 10:24 AM - BWHITTLE	Association	Policy - B	AUT	- 03807677			
Last updated	4/18/2023 8:58 AM - PROCE551	Line ID						
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Reminder	at at	Amount	CL Auto	•		0.00]	
Who to Cont	act							

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.

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	Add a Note		\times					
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	Please note, uninsured motorists property damage deductible \$250 has not been downloaded in epic.							
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- 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



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.

File Edit Areas Home	Locate Actions I	Real-Time On Demand	Access Links myEpic	SMS Help							
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Policies	MBHM	New Business	02/16/2022	02/16/2023	5255649401	L	D	OWNIN	Mobile Home		\$813.79
2 Proofs of Insurance ③ Transactions Ø Attachments ④ Claims 圖 Activities ③ SMS History	Owners Insura Policy Detail Contr	nce IVANS eServicing	Policy Inquiry Clai	n Inquiry Billing Inqu tail	iry Company	Website			In Pro	ogress/Suspended W	6 items, 1 policy sel
д энэ насну	Type AUTO Source SIC NAICS Balance Agent	 /2021 - 10/15/2022 - Personal Automobile - x - \$0.00 	Invoice to Balance	Client - Reginald an PO Box 525 Alto, GA 30510	d Sonya C	Status REM ICO OV PPE OV omments	I - Renewal WNIN1 - Own WNIN1 - Own	ers Insurance ers Insurance			

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El Accurdes	Contract Effective 10/15/20 Type AUTO - P Source SIC NAICS Balance Agency -	ed 022 - 10/15/2023 ersonal Automobile	Bill Invoice to	Direct Client - Reginald at PO Box 525 Alto, GA 30510	nd Sonya	Status RE ICO O PPE O Comments	N - Renewa WNIN1 - Ow WNIN1 - Ow	l mers Insurance mers Insurance				
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(706) 499-8152 reghix@windstream.net Contact via: Phone	1 00/29/202	2 Renew Rene	nal			_	1soued	10/15/201	2			BOWIEGAB