

Personal & Commercial Line
DCAN/DREI/DNON

Jack Bradley: PL & CL DCAN/DREI/DNON

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Page No: Page 2 of 4

Revision History

Version	Revision Date	Description	Maker	Reviewer	Approver (Agency)
1.0	11/30/2023	DCAN/DREI/DNON	Asmita Das	Operations Excellence Team	-



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Page No: Page 3 of 4

Overview

DCAN/DREI/DNON Follow Up: MB will receive DCAN/DREI/DNON/EDOC activity in Epic, where MB will process the documents as per the workflow

Workflow details –

- TAT for the task – 48Hrs
- For Personal line activity owner will be Megan Brown (mbrown@jackbradley.com)
- For Commercial line activity owner will be Brooke Whittle (bwhittle@jackbradley.com)
- For Cancellation and Reinstatement activity owner will be Megan Brown (mbrown@jackbradley.com)
- For Claim activity owner will be Teresa Huff


Steps–

DCAN

1. Download will assign a DCAN activity to MB to process. It may be a final cancellation or cancellation pending.
2. Open the activity and check the notes.
3. Follow the below procedure to complete it
 - If it is a cancellation pending, then follow CNPR SOP
 - If it is a final cancellation, then follow the Final Cancellation (FINA) SOP
 - If it is already processed, then close the activity
 - Open the DCAN activity and Close it

DREI

1. Download will assign a DREI activity to MB to process. It's a reinstatement transaction
2. Open the activity and check the notes
3. Follow the reinstatement SOP to complete the task
4. If the reinstatement was already processed, then close the DRIE activity by following steps:
 - Open the DREI activity and Close it

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DNON

1. Download will assign a DNON activity to MB to process. It's a non-renewal transaction
2. Open the activity and check the notes
3. Follow the non-renewal SOP to complete the task
4. If it was already processed, then close the DNON activity by following steps:
 - Open the DNON activity and close it