# EDOC - Cancellation

# Jack Bradley | EDOC - Cancellation

## Revision History

| Version | Revision Date | Description | Maker | Reviewer | Approver (Agency) |
|---|---|---|---|---|---|
| 1.0 | 11/30/2023 | EDOC-Cancellation | Asmita Das | Operations Excellence Team | - |

## Overview

EDOC activity contains documents such as Cancellation, Reinstatement which need to be processed as per the workflow, and other documents only require labeling and are assigned to the CSR

## Workflow Details

- TAT – 48 hrs
- Assign activity – Brooke Whittle: for Commercial lines (bwhittle@jackbradley.com)
  Megan Brown: for Personal Lines (mbrown@jackbradley.com)

## Steps:

- Download will assign an EDOC activity to MB to process. Here, carriers download the documents in EPIC.
- Open the activity and check the type of document – If it is Cancellation, then follow the below mentioned steps –
- Now go to EPIC and locate the customer by policy # or insured name
- Before processing the NOC, check the payment status on the carrier website. Proceed further as per the below scenario
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  - ➢ If the Payment is posted, then Create a CNPR task and follow the "CNPR Follow up SOP."
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- Now go to the policy screen and select the policy from the list that falls under the appropriate term as per the NOC cancellation date. Check whether the agency already processes the NOC
- If the NOC activity is present, then skip the document. If it is not present, then follow the below steps to process it:
  - ➢ From the policy screen, select the appropriate policy and click on New - Activity
  - ➢ A page will open to add an activity. Select the policy again
- An activity page will open. Fill out the following details –
  - ➢ Code: CNPR
  - ➢ Description: It will fetch automatically. Change it to "LOB Cancel for non pay/underwriting notice received Policy#, the effective date of cancellation" **(Ex: Home Cancel for non-pay/underwriting notice received OF123456789, eff XX/XX/XXXX)**
  - ➢ Who/Owner: Set the activity as per the following
- If it is a **New Business** policy or **Mortgage Bill policy** or the NOC is issued for Underwriting reasons, then select the CSR **Megan Brown (only for Underwriting reason)** (mbrown@jackbradley.com) for PL and **Brooke Whittle** (bwhittle@jackbradley.com) for CL
- Other than that, select Processing Team1

- Follow up/Start: choose the date as per the following conditions

> ➤ If we are assigning the activity to the agency ( or **Brooke Whittle**), then we need to set it 0 day (same processing date)
> ➤ If we are assigning the activity to the Processing Team1, then set it 3 working days before the due date or cancellation date. If we have less than 3 working days then assign the task to the agency and notify the current billing status in the activity note
> ➤ Note: LOB Cancel for non-pay notice received, the effective date of cancellation. Due amount. NOC attached.

- **(Mention the due amount as per the carrier website)**

Ex: Home Cancel for non-pay notice received, eff 07/14/2022. Due amount $153.04. NOC attached.

- **Add additional notes for: New Business & Mortgage Bill Pollicy – Only for CL**

**Additional line for New Business -** NB is in cancellation status, please follow up with the client. (Ex: Home Cancel for non-pay notice received, eff 07/14/2022. Due amount $153.04. NOC attached.

- **NB is in cancellation status, please follow up with the client – Only for CL**

- Now send an email (for business & Mortgage bill policy) Brooke Whittle (for CL) from jack_processing@marble-box.com. Attach the NOC while sending the email Brooke Whittle: bwhittle@jackbradley.com

> Subject: Customer Name, Notice of Cancellation Policy# XXXXX
>
> Hi Brooke,
>
> This is to inform you that the New Business/Mortgage Bill policy for the above captioned insured is in Cancellation status. The due amount is $XXX.XX and the due amount is XX/XX/XXXX.
>
> Attached is the NOC for your reference.
>
> (Attached the Signature)

- The created CNPR activity will open and attach or associate the document
  - If there is no EDOC and we have pulled the document from the website then drag the file to the activity to attach it
  - If the EDOC is available, then associate the document with CNPR activity.
  - Also, attach the email that we have sent to the agency for new business or mortgage bill policy
- While attaching the document, a page will appear on the screen. Change the description for the NOC document as below and hit "Finish"
  > ➤ **Attachment Description: LOB NOC eff date of cancellation due amount**
  > ➤ Example -  Home NOC eff 07/14/2022 $153.04
- Now check if there is any DCAN activity from the Activities. If the activity is available, then close it.
  - Open the DCAN activity and Close it