

EDOC

Jack Bradley | EDOC

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Revision History

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



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Overview

EDOC activity contains documents such as Cancellation, Reinstatement which needs to be processed as per the workflow and other documents only requires labelling and assigned to the CSR

Workflow Details

- TAT – 48 hrs
- Assign activity – Brooke Whittle: for Commercial lines
- Megan Brown: for Personal Lines **(Do not re-assign the activity if New Business or Renewal docs are present)**
- For claim activity owner will be Teresa Huff

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 related to cancellation or reinstatement, then follow the respective SOP. Other than that, we will follow the below procedure.
- For Endorsement EDOC activity, MB receive the same notification through DPCH report. MB will check the DPCH report and process accordingly as per the workflow
- Once we open the activity, go the Attachments section
- Under attachment section label the attachment to be more specific about what the EDOC is for
- Now assign the EDOC to the below people on the same day
 - Brooke Whittle: for commercial line
 - Megan Brown: for personal line **(Do not re-assign the activity if New Business or Renewal docs are present)**
 - Teresa Huff: only for claim activity
- Rename the Activity Description with the same description of the attachment file