



**MARBLE BOX**

we build

## Hanover Book Roll

### Jack Bradley – Hanover Book Roll

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Issue date:  
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## Revision History

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



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### Overview

Marble Box will compare the renewal and current term policy premium with the Hanover Quote premium to determine the best premium for the insured.

### Workflow details -

- TAT for the task –
- For any query – Marble Box will reach out to Renee Ivie via activity/email

### Steps –

#### Hanover Book Roll

1. We will receive the task through activity code “HANB” in Epic Dashboard
2. Locate the insured on simply clicking on the activity, which will directly lead us to the insured account where the activity is created by the agency
  - Activity Owner – Renee Ivie
3. Go to the policy section to locate the policy that needs to be searched on the carrier's website
4. We will go to the carrier website and locate the insured –
  - Please note – MB will fill up the Comparison Sheet – Renewal and Current Column section from the Declaration page available on the carrier website
5. For the Home/Auto/Umbrella Current Declaration page – Go to the carrier website and, download the current declaration page and fill up the Current column section in the Comparison sheet accordingly.
6. Then, download the Renewal declaration and fill up the Renewal section.
7. Go to the Hanover carrier website and search by entering insured name in the Personal Line section
8. A page will open then click on the correct insured to get the quoted information
9. Update the Comparison sheet Hanover column for Home/Auto/Umbrella from the carrier website
10. In the same manner, update the Auto and Umbrella section and update the total premium –
  - Update Home, Auto & Umbrella current, renewal and Hanover premium separately



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11. After updating the Comparison sheet, we will attach the same in EPIC and add an activity note
  - Comparison updated and attached – If all the policy Current, Renewal and Hanover column is updated
12. If no Renewal Declaration for available for any of the Home, Auto or Umbrella Policy, then we will mention the same in the activity note
13. Then , Complete the task and add the same day as the follow-up day date
14. If we are unable to update any Renewal section due to the unavailability of the declaration page, Renee Ivie will set us the suspense 30 days before the Renewal date
15. After 30 days, if there is still no declaration page available, then we will keep a 3 day of follow-up at our end
16. If the declaration page is available on the follow-up day, then we will update the Comparison sheet and attach the same in EPIC
17. If the declaration is not available, then again, we will keep 3 days of follow-up
18. Even after 6 days of follow-up, the declaration page is not available; then we will notify the same to Renee Ivie