

## **Personal & Commercial Line** **Non-Renewal**

### **Jack Bradley: PL & CL Non-Renewal**

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22, EAST TOPSIA ROAD, KOLKATA – 700 046  
WEST BENGAL



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Issue date: 11.30.2023

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### Revision History

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

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## Overview

Notice of Non-Renewal means a written notice by either party to this Agreement of such party's desire not to allow the Term of the Agreement to automatically renew at the end of the then-current term for another Term, thus having the effect of terminating the Agreement at the end of the then-current term


## Workflow details -

- TAT for the task – EOD
- For Personal lines – Ponda Jackson ([pjackson@jackbradley.com](mailto:pjackson@jackbradley.com))
- For Commercial lines – Brooke Whittle ([bwhittley@jackbradley.com](mailto:bwhittley@jackbradley.com))

## Steps -

### Non-Renewal (NONR)

1. Source of Non-renewal documents:
  - MB will visit the carrier websites every day and pull the Non-renewal documents. MB will process them as per the below procedure.
  - Agency will also forward the carrier notification emails or scanned copies to MB. MB will also pull and process them in EPIC
  - We may receive documents through EDOC
2. Now go to EPIC and locate the customer by policy # or insured name
3. Select the policy from the policy screen that falls under the appropriate term as per the non-renewal effective date. Now check whether the agency has already processed it
4. If the non-renewal 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 and hit on “Continue”
    - An activity page will open. Fill out the following details
      - ➔ Code: NONR
      - ➔ Description: It will fetch automatically. Change it to -  
 “LOB Non-Renewal received effective date of Non-renewal & effective date of Non-Renewal”  
 (Ex: Home Non-Renewal received eff 04/29/2023 & eff Non-Renewal 07/29/2023 )
      - ➔ Who/Owner: Select the CSR **Ponda Jackson** for PL and **Brooke Whittle** for CL
      - ➔ Follow up/Start: set it 0 day (same processing date)
      - ➔ Status: Choose “Open” always

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5. Add a Note: **LOB Non-renewal received the effective date of non-renewal & effective date of Non-Renewal reason for non-renewal. Non-renewal Attached.**  
*(Ex: Home Non-Renewal received eff 04/29/2023 & eff Non-Renewal 07/29/2023, as there are no handrails around a porch more than two feet in height. Non-renewal Attached)*
  - ➔ Now hit on Detail
  - ➔ Now send an email to Ponda Jackson (for PL) or Brooke Whittle (for CL). Attach the Non-renewal while sending the email  
Ponda Jackson: [pjackson@jackbradley.com](mailto:pjackson@jackbradley.com)  
Brooke Whittle: [bwhittle@jackbradley.com](mailto:bwhittle@jackbradley.com)
  - ➔ Once we click on Details the Non-renewal activity will open. Now attach or associate the document.
    - *If there is no EDOC and we have pulled the document from 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*
6. While attaching the document a page will appear on the screen. Change only the description for the non-renewal as below and hit “Finish”
  - Attachment Description: **LOB Non-renewal eff date of non-renewal**  
*(Ex: Home non-renewal eff 07/14/2022 )*
7. Now check if there is any DNON activity from the Activities. If the activity is available, then close it
  - Open the DNON activity and close it
  - A page will appear on the screen. Hit finish but make sure “successful” should be selected in the closed dropdown

### Associating EDOC attachment with NONR activity

1. If EDOC activity is present
  - Open the activity and it will take us to the attachment section for that activity
  - Edit Attachment Detail. Make sure to label the document as **LOB Non-renewal eff date of non-renewal** *(Ex: Home Non-renewal eff 07/14/2022)*
  - Then associate the document with FINA activity



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2. Now select the appropriate NONR activity that we have created from the list and hit 'Finish'
3. Again click on 'Finish' on the "Attachment Details" screen
4. Now close the EDOC activity. Make sure to select "Successful" from the dropdown and hit 'Finish'.