Large Lines Automatic Renewal Epic Processing Instructions

Step	Workflow Step	Details	Activity
1	Auto RNLC	Auto RNLC activity is generated four months (120 days) prior to the expiring month	Auto **RNLC**
2	Update **RNLC** activity	Review tasks, determine owners, set start and due dates and updated/attach upon completion of each task a) Establish Account Strategy b) Obtain Renewal Exposures c) Loss Run Spreadsheet d) Obtain Flood Determinations e) Obtain Loss Runs f) Prepare Loss Summary g) Prepare Summary of Insurance h) Prepare Renewal Submission i) Update Certificate Holder List j) Obtain Quotes k) Create Proposal l) Add **BILC** Activity	Update **RNLC**

Step	Workflow Step	Details	Activity
		Policy Renewal Received	

3	*AE Receives Automatic Renewal*	a) AE receives renewal policy/declaration page
		
		b) Locate client and policy in Epic
		
		c) If not downloaded, renew policy (if downloaded all will be accomplished during download process)
		
		o Click Actions > Renew
		
		o Verify/Change Policy Status as REN
		
		o Click Detail
		
		o Highlight Policy on the Navigation Panel
		
		    o Confirm Servicing/Billing detail screens
		
		o Highlight Line on the Navigation Panel
		
		    o Click Line Tab - Confirm
		
		    o Click Billing Tab - Confirm
		
		    o Click Servicing Tab - Confirm
		
		    o Click Pr/Br Commissions Tab - Confirm
		
		    o Click Categories/History Tab - Confirm
		
		o Update applications displayed in navigation panel as needed
		
		    o Click X in Navigation Panel to Exit application detail
		
		    o In Process Policy Box Appears > Yes, perform action:
		
		    o Select Issue/Not Issue Policy in the drop down
		
		    o Click Finish
		
		    o Issue/Not Issue Policy box opens
		
		    o Verify policy #, dates and policy status - update if needed
		
		    o Close any open activities
		
		    o *(If incorrect see endorsement workflow to order any needed changes.)*
		
		    o Click Finish
			Update / Close
			
			RNLC
			
			Update / Close
			
			RNLC

Large Lines Automatic Renewal Epic Processing Instructions

Step	Workflow Step	Details	Activity
4	AE Creates BILC Activity	a) Manually create (F9) BILC activity o Click Policies on the Navigation Panel o Highlight the renewing Policy line o Hit F9 on the keyboard o Choose the appropriate add to drop down > Policy o Click Continue o Select BILC under code o Insert appropriate description o Update Follow up/Start date o Insert notes in notes field o Leave activity Open for receipt of signed apps. o Click Finish	Manual BILC
5	AE Attaches Renewal DEC to renewed policy line	g) Drag/Drop Policy into BILC activity o Choose activities in the Navigation Panel o Highlight the BILC activity o Drag and Drop to the highlighted BILC activity o Select Marketing & Renewal Information o Click Finish o If needed leave BILC activity open for invoicing/delivery of policy renewal to client. Close Successful once distributed/invoiced.	Update BILC
		Issue Proofs of Insurance	
6	Carrier binding confirmation is received, issue proofs of insurance	See Proofs of Insurance Workflows	
		Carrier Invoice Received	
7	Carrier forwards Invoice	a) Drag/Drop Invoice to BILC Activity o Insert Appropriate Description of Document (eff. Coverage type carrier and binder confirmation o Select appropriate Documents Folder o Set Follow-up to Accounting o Click Finish	Update BILC

Large Lines Automatic Renewal Epic Processing Instructions

Step	Workflow Step	Details	Activity
		IF NEEDED: Invoice Policy	
8	AE – If Direct Bill	See Billing Workflow	
9	AE – If Agency Bill, Invoice Premiums (Taxes & Fees, If applicable)	See Billing Workflow	
		IF NEEDED: Send Policy to Client (Refer to the New Business Workflow)	
10	*IF NEEDED:* AE *Creates Delivery Letter/Send to Client*	See New Business Workflow Step 21	