Large Lines 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 Note: Caution tasks will NOT display on home base until Activity Follow-Up due date has arrived - Main Activity Governs tasks	Update RNLC
3	Send renewal paperwork and contact the client	Send renewal paperwork/meet with client Items to include: a) Summary of Expiring Coverage b) Review Changes in Exposure c) Coverage Options d) Identify Coverage Gaps f) Prior Remarketing Results Call the client: a) Confirm they received renewal paperwork b) Request renewal exposure information if unknown e) Offer assistance/answer questions/address concerns f) Request ETA on renewal paperwork (encourage 2 weeks or less) g) Create a follow up reminder for 1 week	Update RNLC

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Step	Workflow Step	Details	Activity
4	*AE receives Client information*	a) Drag and drop it to the RNLC activity o Attach To Box will open: o Complete description using naming convention o Select appropriate Attachment Folder/Sub Folder o Click Finish o Mark each task complete upon completion	Update RNLC
5	AE Receives Updated Application/Information	Prepare RMMK submission a) Click Policies in Navigation Panel b) Click Current/Renewed and change Policies List view menu bar to Marketed c) Click white paper to Add Master Marketing Submission d) Enter coverage term and "name the Master Submission" in the Name field, enter Effective/Expiration Dates e) Select the appropriate agency, branch, department f) Under Policies to Market List view Insert Type of Business as Commercial Lines g) Click White paper and Click o Add Existing Line radio button then Continue o Check all applicable policy lines to market o Click Finish i) Highlight each line of business displayed and update the Policy status to REN and the profit center for each j) Click Detail o RMMK Activity generates o update Follow up/Start date o Click Finish k) IF NEEDED: Update Location/Building numbers to sync the correct Location and Building numbers - Default display as correct - Update Loc/Bldg. # link on top Click Update if numbers each location to appropriate building/location number and Finish once done l) Update/Complete applications in the navigation panel and the Line, Servicing and Categories/Comment Tabs displayed for each Line m) Add any Attachments to the Attachment tab that you might need for the Marketing Submission (whether or not they are carrier specific) You can add these later if needed as well, but it's best to pull everything together here that you can. o Click attachment tab o Click white paper to add attachments n) Click X in Navigation Panel to exit once complete	System RMMK

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Step	Workflow Step	Details	Activity
6	AE Creates Proposal	a) AE creates proposal o Update all expiring data o Create 2 option columns o Attach to RNLC activity o Note: New proposal system is being developed and once completed we will update 12/11/15 o If AE is processing the submissions to the carriers: Complete step 6 after quote(s) received o Complete the option(s) data o If Marketing is processing the submissions to the carriers: o Forward the proposal to the corresponding marketing representative	
IF NEEDED: Preview/Print Applications for Review			
7	*IF NEEDED: Print/Preview copy of Master Submission to provide to producer for review or confirm application information*	a) To preview a copy of the master submission b) Highlight Master Submission o Click Print > Master Marketing Submission o Select printer (pdf printer if paper not needed) o Click Forms/Attachments tab and unselect any application form not needed o Click Organization Contact tab to confirm agency/branch information correct c) Click Preview to view a copy or Finish to print/Cancel if not needed	
Create Carrier Submissions			
8	Create Carrier Submissions to Market	a) AE submits to carrier: Refer to marketing process OR b) Marketing submits to carrier: AE generates an email to marketing advising RMMK activity is complete	

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9	*Carrier Confirms binding or website confirmation Received*	a) Review against Bind Order for accuracy b) Drag/Drop Carrier Binder/confirmation from carrier website/Unrouted Attachments or Email to 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 Add Notes o Leave Open for Policy Receipt o Click Finish c) Click Actions > Change Policy Prospective/Contracted Status o Do you wish to update this policy from Prospective to Contracted? d) Select Yes	Update BILC
10	AE *receives ordered Policy, attaches to Current/Renewed Policy*	a) Account Manager receives new policy/declaration page b) Drag/Drop Policy/Declaration page into BILC o Choose activities in the Navigation Panel o Highlight the BILC activity o Drag and Drop to the highlighted BILC activity o Select Policies folder o Click Finish *NOTE: Attach Each Policy separately & manage non-policy items Separately.*	Update BILC

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Step	Workflow Step	Details	Activity
11	AE *is to Update application and Issue/Not Issue Policy **If Downloaded by Carrier, no need for this step*	a) Locate client and policy b) Check Policy Received against Binder Order/Proposal/Quote c) Double Click Policy o Review applications displayed in navigation panel and perform application correction as needed (see endorsement workflow) o Click X in Navigation Panel to Exit application detail and select Yes, perform action: Issue/Not Issue Policy!!! Make as note at end of the BILC tasks o Verify policy #, dates and policy status - update if needed o Click Close any Open Activities tab o Highlight the any open activities and select closed successful if renewal is correct; unsuccessful with appropriate reason if incorrect. (If incorrect see endorsement workflow to order any needed changes.) o Click Finish d) Click Activities in Nav. Panel and close open activities f) If Downloaded: Policy Line will reflect Issued by Download once received g) Access & Complete Policy Review Checklist h) Drag and drop it to the 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 Policies folder o Click Finish	Update / Close BILC
IF NEEDED: Send Policy to Client (Refer to the New Business Workflow)			
12	*IF NEEDED: AE Creates Delivery Letter/Send to Client*	See New Business Workflow Step 21	
Issue Proofs of Insurance			
13	Carrier binding confirmation is received, issue proofs of insurance	See Proofs of Insurance Workflows	
Carrier Invoice Received			
14	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

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Step	Workflow Step	Details	Activity
IF NEEDED: Invoice Policy			
15	AE – If Direct Bill	See Billing Workflow	
16	AE - If Agency Bill, Invoice Premiums (Taxes & Fees, If applicable)	See Billing Workflow	