Large Lines Marketing Epic Processing Instructions

Step	Workflow Step	Details	Activity
Create Carrier Submissions			
1	Marketing for new carrier quotes Create Carrier Submissions to send to market	Prepare information to be sent to carriers/brokers a) Create Carrier Submission for Incumbent and additional carriers to approach b) Highlight Master Submission o Click Actions > Create Carrier Submission o Select Carrier/Broker (CA=Carrier list/BR=Broker list) o Insert Carrier Submission Detail – Add carrier underwriter name/number for future viewing in Carrier Submission red box o Select appropriate submission status of In Progress o Deselect (uncheck) any coverage lines not needed for this carrier c) Click Attachments tab – Add/Uncheck any attachments needed specifically for this carrier (specific Loss Runs, MVRs, supplemental apps., etc.) d) If needed: Highlight each line of business and insert requested line premium e) Click Add to add each carrier/broker being approached f) Repeat steps a – c above until all carriers/brokers to approach have been added g) Click Finish once complete h) *As Needed:* Double click each carrier submission to make any carrier specific application carrier changes needed (Exit each app and repeat for each)	

Step	Workflow Step	Details	Activity
Submit Carrier Submissions to Market			
2	*Marketing Submits Apps to identified Carriers through EPIC Distribution Manager*	a) Highlight each carrier submission to send to market b) Click Actions > Submit to Carriers c) Submit to Carrier Box displays o Submit As – Select Quote o IF Needed: Select producer signature o Click Continue d) Select Radio Button for Create One activity per carrier submission e) Check boxes for each submission to distribute to market o Address all tabs for each checked submission highlighted o *Details:* Underwriter information if available o *Forms/Attachments:* Select/Unselect lines of business to include in highlighted submission o *Organization Contact:* confirm correct information displays o *Distribution:* Select VIA method for each checked submission (can select a different method for each submission but if email, same message will display for each emailed submission) o *Close Open Activities: You c*an close any activities no longer needed (RMMK activity will display leave open) o Click Preview to view submissions or Finish to distribute all selected submissions simultaneously f) Select CSUB Activity for each New Business submission once distributed. o Update the description of each to include carrier approached and coverage types submitted o Who/owner update as needed. o Adjust follow-up date for receipt of response from the carrier/broker o Insert any notes in the note field g) Finish Leave open h) Click Finish	System CSUB

Large Lines Marketing Epic Processing Instructions

Step	Workflow Step	Details	Activity
3	*Document Carrier Underwriting discussions / decisions*	a) Attach all documentation for the status of the Marketing Submissions to each carrier submission's open CSUB activity o Highlight the applicable submission o Click Access > Activities > Open Activities o Highlight open Activity displayed b) Drag/Drop each received response to applicable open activity	Update CSUB
Create Carrier Responses			
4a	*Received Quote from Carriers/Brokers*	a) Highlight applicable Master Submission then applicable Carrier Submission b) Click Actions > Create Carrier Response o Insert Issuing Company o Insert Description of quote received o Insert Date Received and total quote premiums/commissions o Highlight line of business and in the carrier response drop down select quote o Click *Apply to all Lines* if quote received for each line o Insert response line premium specific to each line of business quoted o Select the attachment tab o Drag/Drop Quote o change "attach to" to activity o click the magnifying glass choose approprate CSUB o Insert description attached using the naming convention o Select Marketing & Renewal Information folder o Select Quotes in Sub-folder 1 o Click Finish	

Large Lines Marketing Epic Processing Instructions

Step	Workflow Step	Details	Activity
4b	*Marketing Receives Declination from Carriers*	a) Highlight applicable Master Submission then applicable Carrier Submission b) Click Actions > Create Carrier Response o Insert Description of declination reason received o Insert Date Received o Highlight each line of business and select carrier response of Decline and appropriate description from drop down box o Click *Apply to all Lines* if applicable for all lines of business o Select the attachment tab o Drag/Drop Quote o change "attach to" to activity o click the magnifying glass choose approprate CSUB o Insert description attached using the naming convention o Select Marketing & Renewal Information folder o Select Quotes in Sub-folder 1 o click Finish o Select the activities tab o Highlight open CSUB o Change status to Closed o Select Unsuccessful in Closed dorp down o Select the appropriate resaon in the Reason o click Finish	Update CSUB
4c	*No Carrier Response Received for Submission Sent*	a) Highlight applicable Master Submission then applicable Carrier Submission b) Click Actions > Create Carrier Response o Insert Description of "Not Received" o Insert Date Received o Highlight each line of business and select carrier response of "Not Received" o Click *Apply to all Lines* if applicable for all lines of business o Select the activities tab o Highlight open CSUB o Change status to Closed o Select Unsuccessful in Closed dorp down o Select the appropriate resaon in the Reason o click Finish	Update CSUB

Large Lines Marketing Epic Processing Instructions

Step	Workflow Step	Details	Activity
Create Proposal/Deliver Quotes To Client			
5	*If Creating Proposal Outside (i.e.. using Proposal system) for New Business*	a) Retrieve the proposal generated by the AE in the RNLC activity b) Enter quotes into the proposal c) Drag/Drop Proposal to RNLC activity, describe document appropriately and select: o Marketing Folder o Binders and Proposals sub folder d) Click Finish	Update RNLC
Request/Receive Coverage Binding			
6	*AE Moves Marketed Lines to Current/Renewed Policy List View - Address all TABS*	a) Double Click Carrier Submission to Move to Current/Renewed Policy List View to confirm applications to be moved are correct and require no changes o Once applications are confirmed click X in navigation panel to return to Carrier submission b) Click Actions > Move Marketed Lines to Current Policies c) Address the Policies Tab to determine the policy type being created when moved (CPKG for Package, BAUT for Business Auto, PROP for Property ,etc.) o Select Add New Policy Radio button o Select Policy Type (Package if policy is to include multiple lines) o Description will default o Insert Policy # if known o Confirm the Effective/Expiration Dates o Enter Agency/Branch/Department/ Estimated Premium and Commission d) Click the Lines Tab to determine which available lines from the carrier submission to be included in the policy (first tab) being created when moved o Highlight each line of business displayed under lines o Select an Option radio button for Each Line o *Select Add to this Policy* for each line to be included in the Policy Type selected on the Policies Tab o *Select Add to different policy* if the line available is to be used on a separate policy to be moved to current/renewed after this policy is moved o Select *Do Not Add To Any Policy* if an available line was declined or is not being moved to current/renewed from this carrier/broker submission o Address All Lines of Business and Line Commission information for each line of business e) Click the Attachments Tab which allows you to select any affiliated items (attachments) f) Click the Activities tab will allow you to close any open activities affiliated with the submission being addressed o Highlight any open activity that can be closed during this process, click closed, insert a note *Continued on the next page…*	

Large Lines Marketing Epic Processing Instructions

Step	Workflow Step	Details	Activity
6	*AE Moves Marketed Lines to Current/Renewed Policy List View - Address all TABS*	g) Select Move if any Lines on the Lines tab are to be added to a separate policy h) Select Finish if all lines in this carrier submission are addressed and no additional lines are to be moved as a separate policy o Update Submission Status to Completed o Click Finish	
7	Request Coverage Binding from Carrier/Broker	a) Manually create (F9) BILC activity o Click Policies on the Navigation Panel o Highlight the renewed 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 Select Who/Owner AE o Update Follow up/Start date o Insert notes in notes field o Leave activity Open for receipt of signed apps. o Click Finish b) Drag/Drop Policy Order 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 c) Click Activities in the Navigation Panel o Locate Open CSUB and RMMK Activities o Click Actions > Close Successful o Add Notes indicating coverage to be bound o Click Finish	Manual BILC

Large Lines Marketing Epic Processing Instructions

Step	Workflow Step	Details	Activity
8	*Complete Turnover Checklist*	a) Complete Turnover Checklist o Click attachments o Click white paper to add new attachment o Choose Document o Choose the Marketing Template folder o Choose the Turnover Checklist o Select Continue o Complete description using naming convention o Select Finish o Add DOCU activity o Select Finish o Complete the Turnover Checklist o Marketing generates an email to AE advising RMMK activity is complete attaching the completed Turnover Checklist	Manual BILC