Commercial Lines AMS Detail Entry Procedures

Endorsements

Requesting endorsement.

1. Click on the dec page view for the policy to be endorsed.

2. Push the ENDORSE (+ sign) button next to the LOB or specific item that needs to be endorsed or on the menu bar at top right if a general endorsement.

3. Enter the date of endorsement, use "Policy Change" as the transaction (or "Binder Endorsement" if your agency binder bills), and describe briefly what is being changed in the description field.

4. Click the Line of Business icon ▶, then the hyperlink to go to the correct data entry form, then the section icon ▶as required; make the change(s) on the data grids.

5. Click the Save and Close icon when data entry is complete (check the status bar at the bottom to be sure data was saved successfully). This will exit the LOB and return to the policy level.

6. From within the policy click the arrow next to eForms and choose Change Request.. (If you have exited the policy, eForms a menu option at the Customer Center level—be sure the correct policy is selected before beginning eforms from this level)

7. Verify the change details, and the other data that defaulted to the form—change as needed using the dropdowns or by editing directly. Add an agency message and recipients (below notes) as needed.

8. Press Create at the top right of the form. The request will appear in the View pane to the right and on the tree to the left. Use the Edit button above the form should you need to add or change any information. Be sure to save the form regardless of whether you edit the data. (Data will not flow back to the policy from the form.)

9. From the File menu, print or email the form. The print or email will default to "page displayed in viewer"—so be sure to select "form and overflow" if you have created a two page form. Save anc close after printing/emailing the form.

10. Log an activity and suspense after exiting the form.

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After endorsement received.

1. Select the policy that was endorsed.

2. Click on the COMPARE POLICIES button. The endorsement being checked should be on the left, the previous version of the same policy on the right at the top of the screen. Click the VIEW DIFFERENCES button. (Alternatively, you may check the eForm for the policy change in question. Do this by clicking on the change request tab and clicking the form link to view the request.)

3. If invoicing is required, open the policy by clicking the policy number link. Making sure that the correct effective date is showing, click on the ▶ icon to open the Transaction Premiums/Billing section. (If the endorsement was a Binder Endorsement, replace the binder by clicking on the Actions menu , then Policy, then on Binder Bill. A Binder Bill dialog will appear that will prompt you to replace the transaction with “Policy Change”. This will replace the binder bill.)

4. Enter the premium on the appropriate line(s), then choose Update.

5. Invoice the endorsement by clicking the Create Invoice hyperlink if billing from the customer center. Pay close attention if the policy was on installments or financed. See billing details for instructions.

6. Click on the Save and Close icon when all updates and billing are completed.

7. Log an activity after exiting the policy.