

# PA Customer Acknowledgement

## PolicyCenter



### Description:

This job aid discusses the Pennsylvania *Customer Acknowledgement* screen. The notices and documents on this screen are viewed, and shared with the customer, on the *Documents* screen. Currently, there are differences in the names of documents on the *Customer Acknowledgement* screen and *Documents* screen.

### Background:

In the state of Pennsylvania, the *Customer Acknowledgement* screen displays pre-bind. Customers in Pennsylvania must be presented with the notices and documents displayed on the *Customer Acknowledgement* screen prior to binding any new business. On the *Documents* screen, view, save, and email all notice and/or documents to the customers. The eSignature process cannot be used pre-bind.

### Step 1

Action	Screen
<p>The <i>Customer Acknowledgement</i> screen displays when you attempt to finalize the submission quote.</p> <p>Do not answer the two questions until you review the notices and documents with the customer.</p> <p>Click the <b>Documents</b> link.</p> <p><b>NOTE:</b> At this point, do NOT click either of the buttons at the top of the screen.</p>	

### Step 2

The *Documents* screen displays.

The names of the notices and/or documents are slightly different on the *Document* screen versus the *Customer Acknowledgement* screen. See the chart below to map the names.

Customer Acknowledgement Screen	Documents Screen
Important Notice First Party Coverage (Available Benefits & Limits)	PA Important Notice
Notice of Tort Options & Notice of Premium Discounts	Important Notice – Tort Options & Notice of Premium Discounts – Pennsylvania
Automobile Insurance Merit Rating Plan Information (Surcharge Disclosure Plan)	Automobile Insurance Merit Rating Plan Information – Pennsylvania
Minimum Package Invoice & Fraud Warning Notice	Minimum Package Invoice - Pennsylvania

### Job Aid Process (Cont.) :

#### Step 3

Action	Screen
<p>On the <i>Documents</i> screen:</p> <ul style="list-style-type: none"> <li>Click the <b>View</b> button to the right of each notice.</li> <li>Open and save the PDF to your desktop.</li> <li>Review with and/or email the documents to the customer.</li> <li>Repeat for each document until all notices and documents have been provided to the customer.</li> </ul>	

#### Step 4

Action	Screen
<p>On the <i>Documents</i> screen:</p> <ul style="list-style-type: none"> <li>Click the <b>Quote</b> link.</li> </ul>	

#### Step 5

Action	Screen
<p>On the <i>Quote</i> screen:</p> <ul style="list-style-type: none"> <li>Re-click the <b>Finalize Quote</b> button.</li> <li>Click <b>OK</b> in the pop-up confirmation window.</li> </ul>	

## Job Aid Process (Cont.) :

### Step 6

Action	Screen
<p>On the <i>Customer Acknowledgement</i> screen:</p> <ul style="list-style-type: none"> <li>• Update the answers to the questions.</li> <li>• Click the <b>OK</b> button.</li> <li>• Complete the remainder of the quote.</li> </ul> <p><b>Note:</b> After completing this process, if the <b>MVR</b> comes back adverse, you may need to resend the notices again to the customer, as the premium may change.</p>	

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