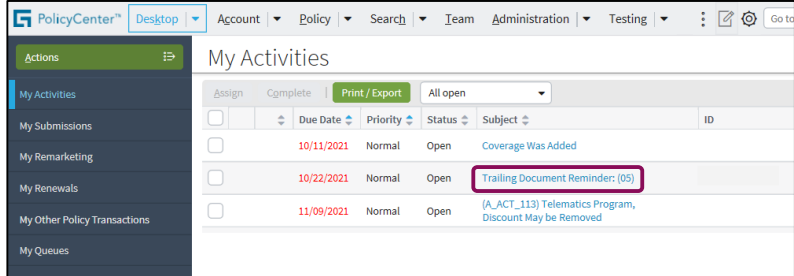


# Follow-up Capabilities for Agents

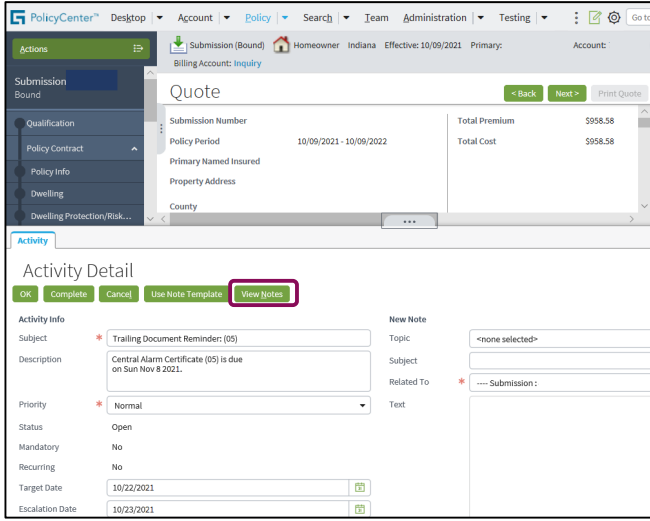
## Description

This step-by-step job aid describes how to follow-up on an activity assigned to an agent.

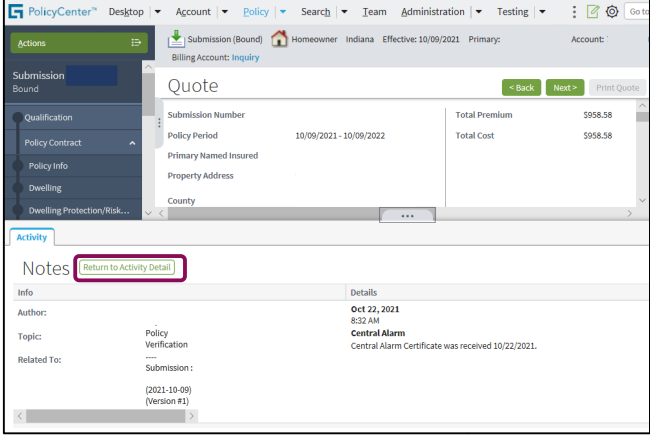
### Step 1

Action	Screen
<p>Navigate to the “My Activities” screen.</p> <p>Select the link of the activity on which you wish to follow up.</p>	

### Step 2

Action	Screen
<p>In the “Activity Detail” section:</p> <ul style="list-style-type: none"> <li>Select the “View Notes” button to view the note from the underwriter.</li> </ul>	

### Step 3

Action	Screen
<p>In the “Notes” section:</p> <ul style="list-style-type: none"> <li>Review the note from the underwriter.</li> <li>Select the “Return to Activity Detail” button.</li> </ul>	

## Step 4

## Action

The activity from the underwriter requires action.

- Select the “Complete” button to mark the activity as complete.

## Screen

The screenshot shows the PolicyCenter interface. The top navigation bar includes 'Desktop', 'Account', 'Policy', 'Search', 'Team', 'Administration', 'Testing', and 'Go to'. The main content area displays a 'Quote' screen for Submission 40943836. The 'Activity' tab is selected, and the 'Complete' button is highlighted in the 'Activity Detail' section. The 'Activity Detail' section includes fields for Subject, Description, Priority, Status, Mandatory, Recurring, Target Date, and Escalation Date. The 'New Note' section is also visible.

## Step 5

## Action

Next, you will assign a new activity to the underwriter.

- Select “Actions” > “New Activity” > “Reminder” > “General reminder (diary)” from the drop-down menus.

## Screen

The screenshot shows the PolicyCenter interface. The 'Actions' menu is open, and the 'New Activity' option is selected. The 'New Activity' dropdown menu is displayed, showing options like '30 day diary', 'General reminder (diary)', 'Request to Processing', 'Request to Producer', and 'Request to Underwriting'. The 'General reminder (diary)' option is highlighted.

## Step 6

## Action

In the “New Activity” section:

- Enter the appropriate information in the activity fields. For example, enter information into the “Subject” and “Description” fields.

## Screen

The screenshot shows the PolicyCenter interface. The 'New Activity' section is displayed, and the 'Subject' and 'Description' fields are filled with 'General reminder (diary)' and 'Central Alarm Cert Received' respectively. The 'Due Date' is set to 10/22/2021, and the 'Escalation Date' is set to 11/02/2021. The 'Priority' is set to Normal, and the 'Mandatory' and 'Recurring' options are set to No. The 'Document Template' and 'Email Template' fields are also visible.

## Step 7

## Action

To assign the activity to an underwriter:

- Select the button to the right of the “Assign To” field.
- Select “Underwriter” from the drop-down list.

## Screen

The screenshot shows the 'New Activity' form in the PolicyCenter application. The 'Assign To' field is highlighted with a red box, and a dropdown menu is open showing 'Underwriter' as the selected option. The form includes fields for Subject, Description, Due Date, Escalation Date, Priority, Mandatory, Recurring, Document Template, Email Template, and Assign To. The 'Assign To' field is currently set to 'Underwriter'.

## Step 8

## Action

To complete the note:

- Enter the appropriate information in the “New Note” fields. For example, enter desired information into the “Topic”, “Subject” and “Text” fields.
- Select the “OK” button to send the activity to the underwriter.

## Screen

The screenshot shows the 'New Activity' form in the PolicyCenter application. The 'New Note' section is highlighted with a red box, showing the 'Topic', 'Subject', and 'Text' fields filled with information. The 'Assign To' field is also highlighted with a red box, showing 'Underwriter' as the selected option. The 'OK' button is highlighted with a red box.

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