

Create an Activity to Underwriting

PolicyCenter



Description

This job aid describes the processes for creating an activity for Underwriting and replying to Underwriting's response.

Select the link to advance to the desired topic:

- [Create an Activity for Underwriting](#)
- [Create an Activity to Reply to Underwriting](#)

Create an Activity for Underwriting

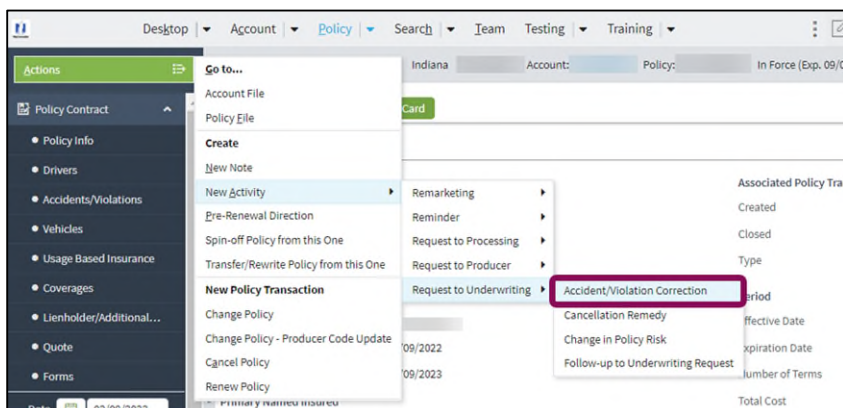
Step 1

Action

Access the appropriate policy to create an activity in PolicyCenter.

- Select the "Actions" button.
- Select the appropriate item from the "Request to Underwriting" drop-down list. In this example, the user selected "Accident/Violation Correction".

Screen



Create an Activity for Underwriting, continued

Step 2

Action

In the “New Activity” section:

- Enter the activity details.

Important Note: Do not edit the information in the “Subject” field. Doing so will cause the Activity to misroute and not be processed.

In the “New Note” section:

- Enter the note details.
- Select the “OK” button.

In this example, the Activity and Note details are entered for you.

Screen

Step 3

Action

On the “Summary” screen, you can view the current activities on the policy in the “Current Activities” section.

In this example, the new “Accident/Violation Correction” activity displays in this section.

- Scroll down to review the current activities.

Screen

Created Date	Due Date	Priority	Subject	Assigned To
03/26/2022	03/28/2022	Normal	Accident/Violation Correction	Underwriting - Auto

Create an Activity to Reply to Underwriting

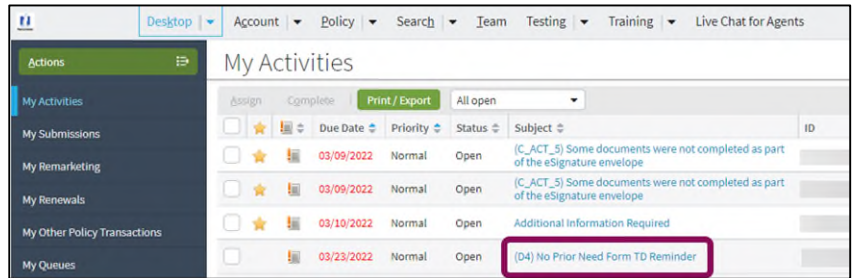
Step 1

Action

Activities assigned to you display on your Desktop.

- To open the activity, select the link in the "Subject" column.

Screen



Step 2

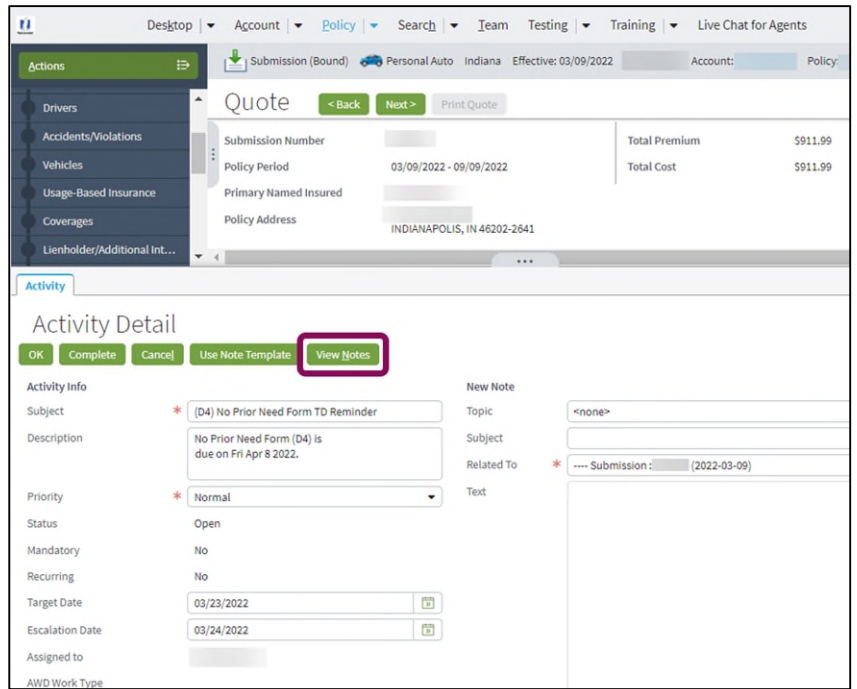
Action

In this example, the Underwriter informs you the Good Student Verification has not been removed.

To view any notes about this activity:

- Select the "View Notes" button.

Screen



Create an Activity to Reply to Underwriting, continued

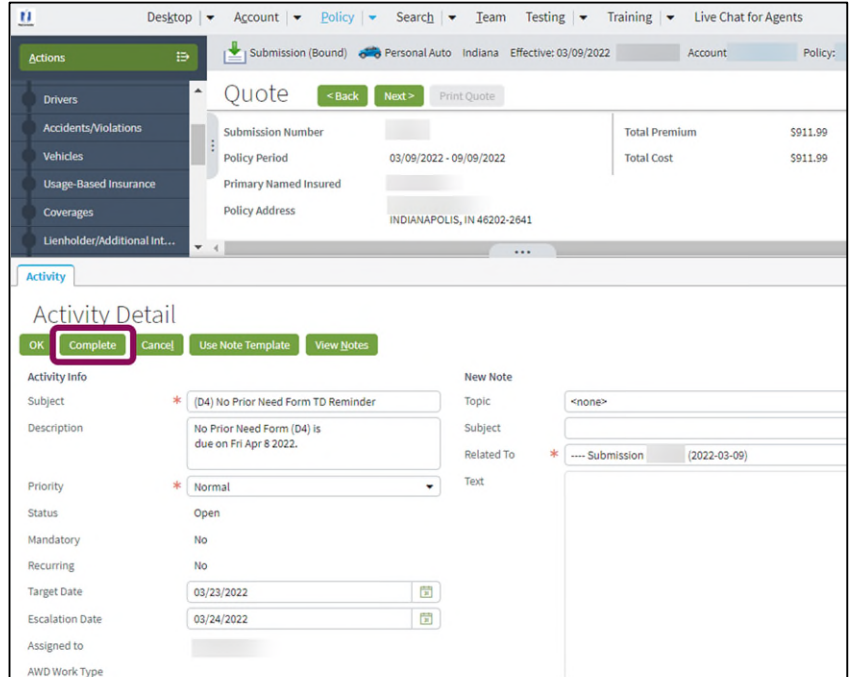
Step 3

Action

To reply to the Underwriter, you must complete the original Activity and create a new one.

- Select the “Complete” button to close and complete this Activity.

Screen



The screenshot shows the PolicyCenter interface. The top navigation bar includes Desktop, Account, Policy, Search, Team, Testing, Training, and Live Chat for Agents. The main content area is divided into two sections: 'Quote' and 'Activity Detail'.

The 'Quote' section displays the following information:

- Submission Number: [Redacted]
- Policy Period: 03/09/2022 - 09/09/2022
- Primary Named Insured: [Redacted]
- Policy Address: INDIANAPOLIS, IN 46202-2641
- Total Premium: \$911.99
- Total Cost: \$911.99

The 'Activity Detail' section shows the following information:

- Activity Info: [Redacted]
- Subject: (D4) No Prior Need Form TD Reminder
- Description: No Prior Need Form (D4) is due on Fri Apr 8 2022.
- Priority: Normal
- Status: Open
- Mandatory: No
- Recurring: No
- Target Date: 03/23/2022
- Escalation Date: 03/24/2022
- Assigned to: [Redacted]
- AWD Work Type: [Redacted]

The 'Complete' button is highlighted in the 'Activity Detail' section.

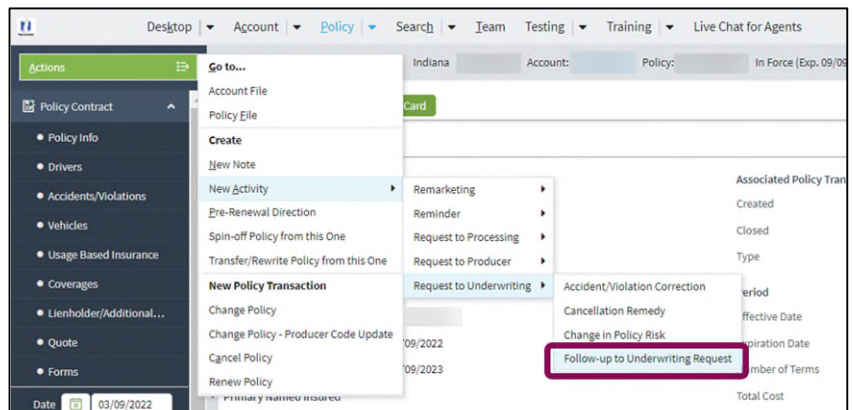
Step 4

Action

To create an activity in PolicyCenter:

- Select the “Actions” button.
- Select the appropriate item from the “Request to Underwriting” drop-down list. In this example, the user selected “Follow-up to Underwriting Request”.

Screen



The screenshot shows the PolicyCenter interface. The top navigation bar includes Desktop, Account, Policy, Search, Team, Testing, Training, and Live Chat for Agents. The main content area is divided into two sections: 'Actions' and 'Request to Underwriting'.

The 'Actions' section displays the following information:

- Policy Contract: [Redacted]
- Policy Info: [Redacted]
- Drivers: [Redacted]
- Accidents/Violations: [Redacted]
- Vehicles: [Redacted]
- Usage Based Insurance: [Redacted]
- Coverages: [Redacted]
- Lienholder/Additional...: [Redacted]
- Quote: [Redacted]
- Forms: [Redacted]

The 'Request to Underwriting' section shows the following information:

- Go to...: [Redacted]
- Account File: [Redacted]
- Policy File: [Redacted]
- Create: [Redacted]
- New Note: [Redacted]
- New Activity: [Redacted]
- Re-Renewal Direction: [Redacted]
- Spin-off Policy from this One: [Redacted]
- Transfer/Rewrite Policy from this One: [Redacted]
- New Policy Transaction: [Redacted]
- Change Policy: [Redacted]
- Change Policy - Producer Code Update: [Redacted]
- Cancel Policy: [Redacted]
- Renew Policy: [Redacted]

The 'Follow-up to Underwriting Request' option is highlighted in the 'Request to Underwriting' section.

Create an Activity to Reply to Underwriting, continued

Step 5

Action

The “New Activity” section displays at the bottom of your screen.

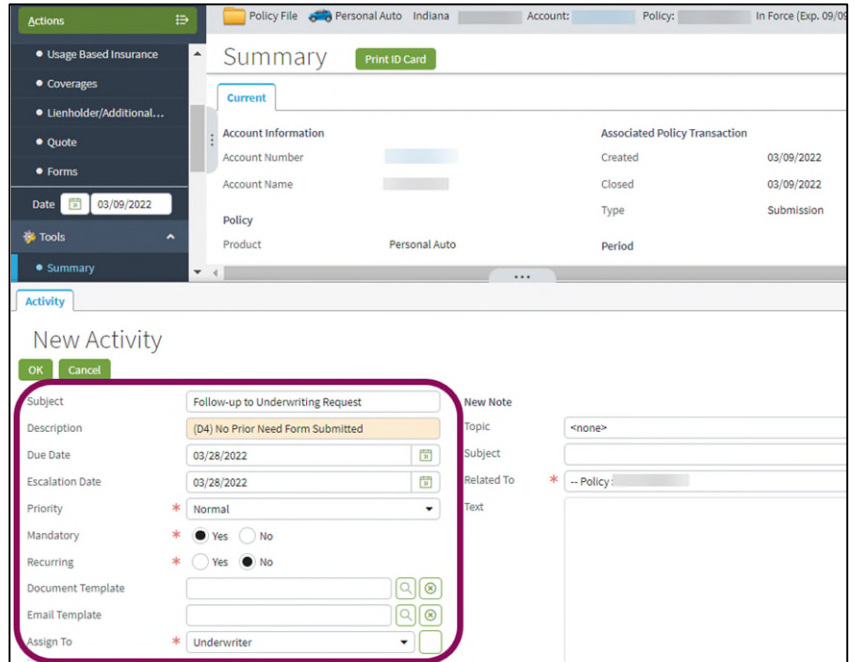
To indicate you are replying to an Underwriting request:

- Enter the information as shown.

Important Note: Some fields are defaulted. For example, the “Subject” and “Description” fields. You can change these fields, as necessary.

- Enter a brief description in the “Description” field.
- The “Assign To” field defaults to “Underwriter”.

Screen



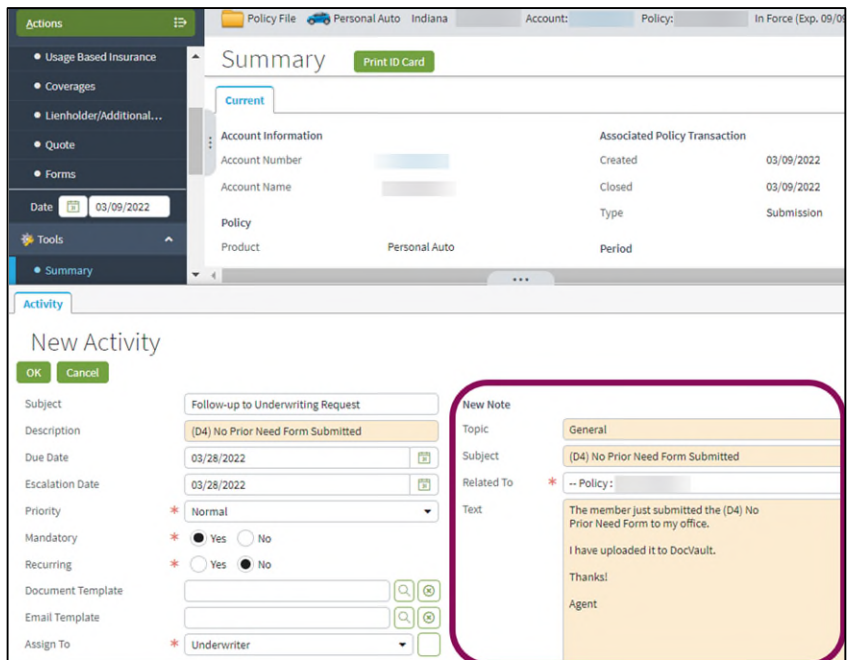
Step 6

Action

To complete the “New Note” section:

- Enter the desired information in the following fields:
 - Topic
 - Subject
 - Text
- The “Related To” field defaults to the policy number.
- Select the “OK” button.

Screen





Create an Activity to Reply to Underwriting, continued

Step 7

Action	Screen															
<p>Once you have sent the activity:</p> <ul style="list-style-type: none">View the “Current Activities” section on the “Summary” screen. <p>In the “Current Activities” section, the recently-created activity displays.</p> <p>The recently-created note also displays in the “Notes” section on the “Summary” screen.</p>	<p>The screenshot shows the 'Summary' screen for a 'Personal Auto' policy in 'Indiana'. The left sidebar contains a 'Tools' section with 'Summary' selected. The main content area displays 'Account Information' and 'Associated Policy Transaction'. At the bottom, a 'Current Activities' table is highlighted with a red box.</p> <table><tr><th>Created Date</th><th>Due Date</th><th>Priority</th><th>Subject</th><th>Assigned To</th></tr><tr><td>03/26/2022</td><td>03/28/2022</td><td>Normal</td><td>Accident/Violation Correction</td><td>Underwriting - Auto</td></tr><tr><td>03/26/2022</td><td>03/28/2022</td><td>Normal</td><td>Follow-up to Underwriting Request</td><td>Underwriting - Auto</td></tr></table>	Created Date	Due Date	Priority	Subject	Assigned To	03/26/2022	03/28/2022	Normal	Accident/Violation Correction	Underwriting - Auto	03/26/2022	03/28/2022	Normal	Follow-up to Underwriting Request	Underwriting - Auto
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[Return to Top](#)

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