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:

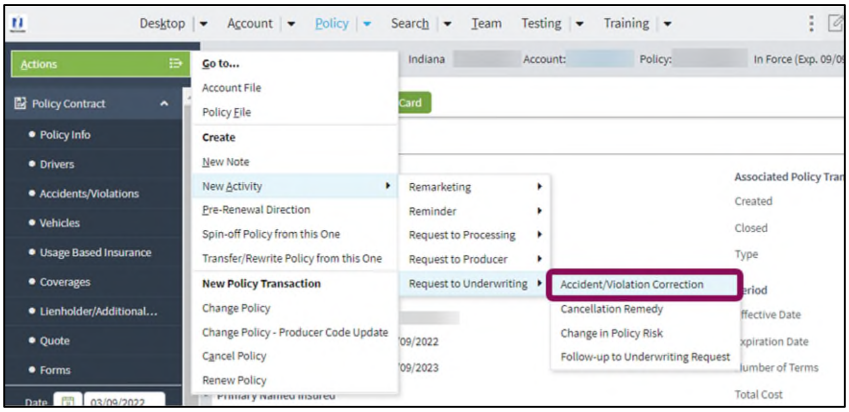
- Create an Activity for Underwriting
- Create an Activity to Reply to Underwriting

Create an Activity for Underwriting

Step 1

<table>
<tr><th>Action</th><th>Screen</th></tr>
<tr><td>
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".

</td><td>


</td></tr>
</table>

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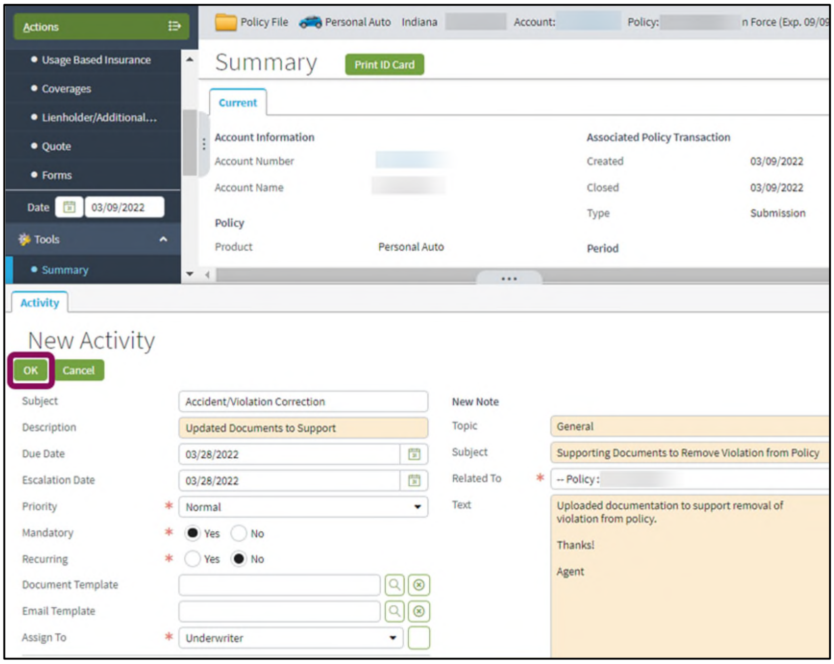
Create an Activity for Underwriting, continued

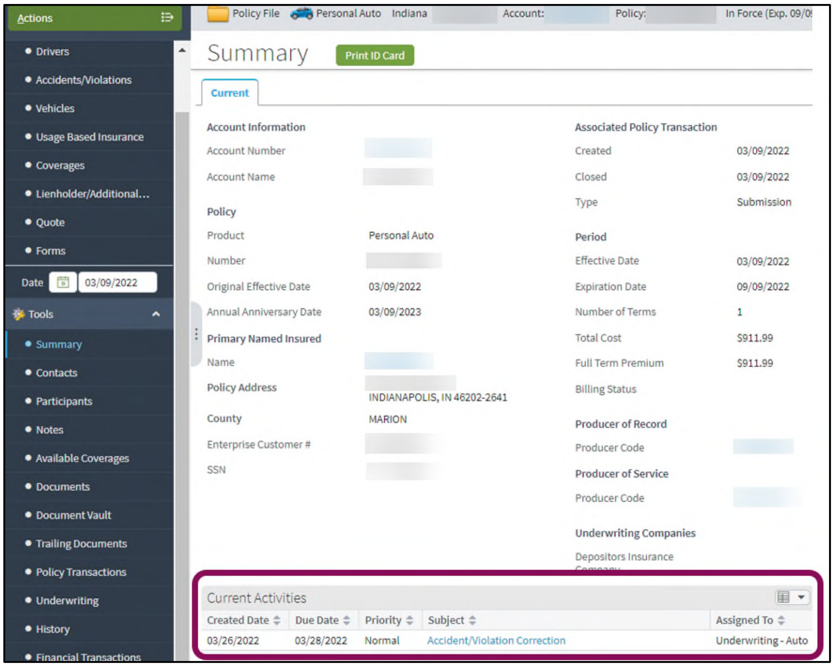
Step 2

Action	Screen
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.	See screenshot below



Step 3

Action	Screen
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.	See screenshot below



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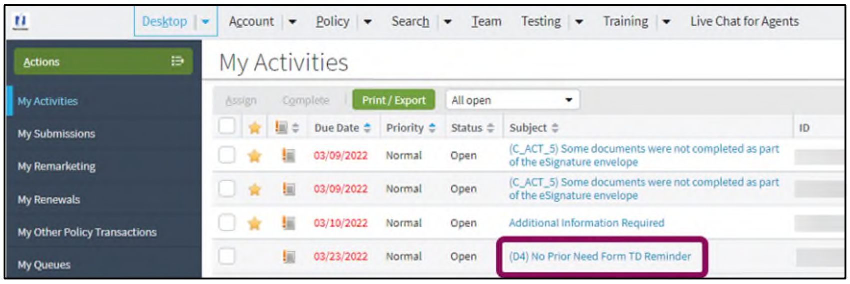
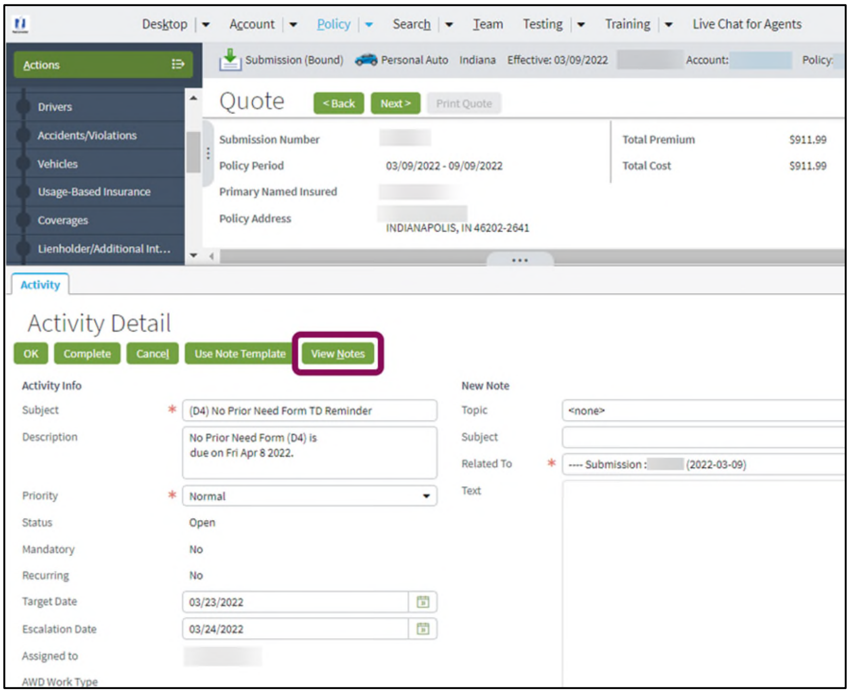
Create an Activity to Reply to Underwriting

Step 1

Action	Screen
Activities assigned to you display on your Desktop. • To open the activity, select the link in the “Subject” column.	

Step 2

Action	Screen
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.	

Create an Activity to Reply to Underwriting, continued

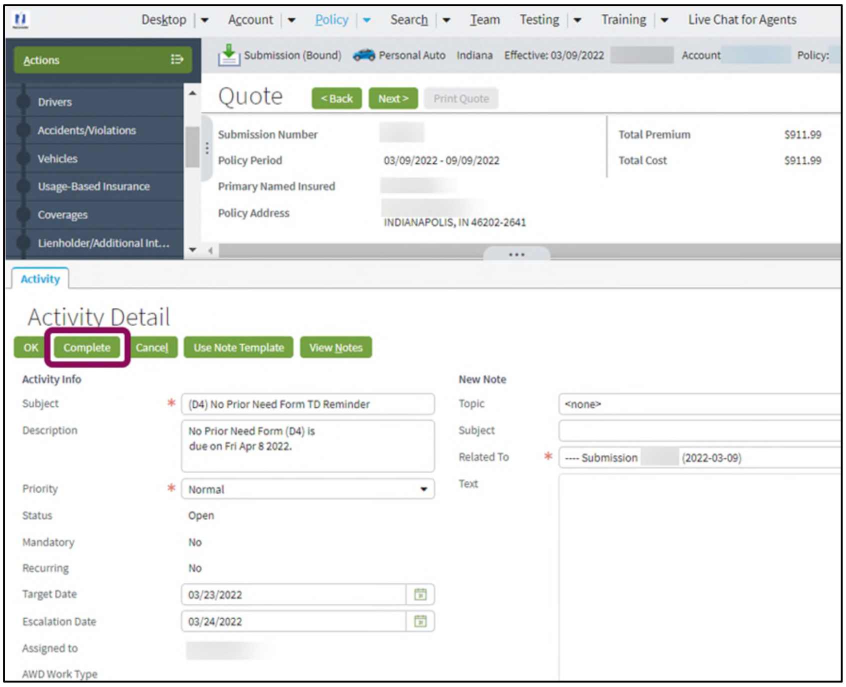
Step 3

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



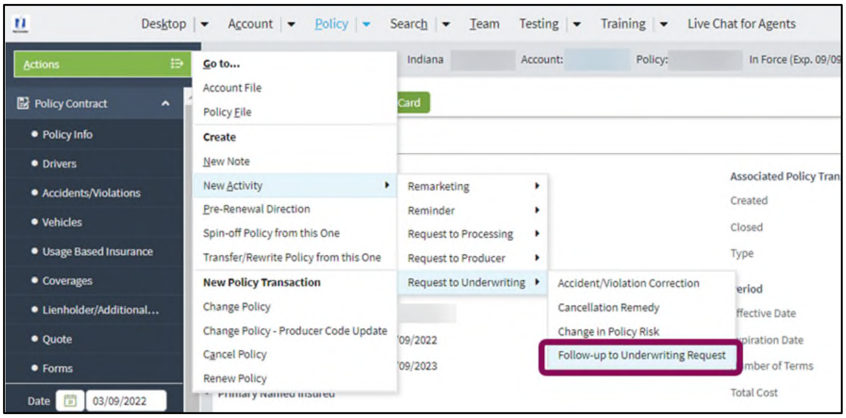
Step 4

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



Create an Activity to Reply to Underwriting, continued

Step 5

Action

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

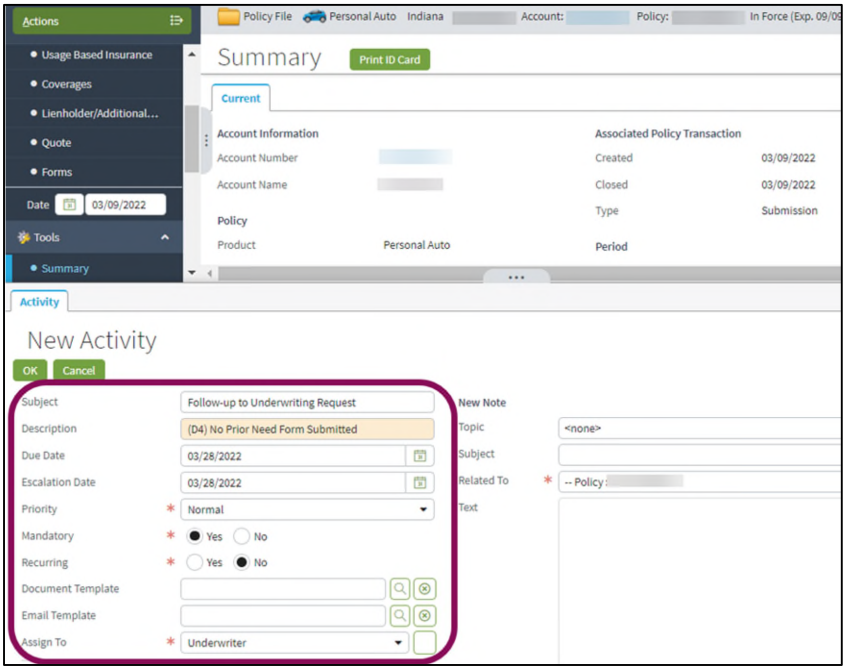
To indicate you are replying to an Underwriting request:

- 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



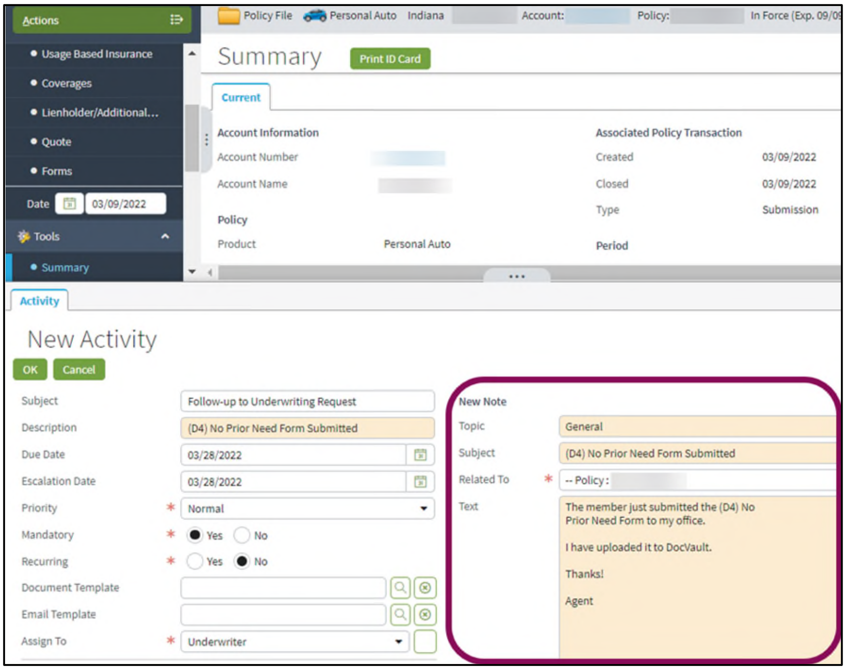
Step 6

Action

To complete the “New Note” section:

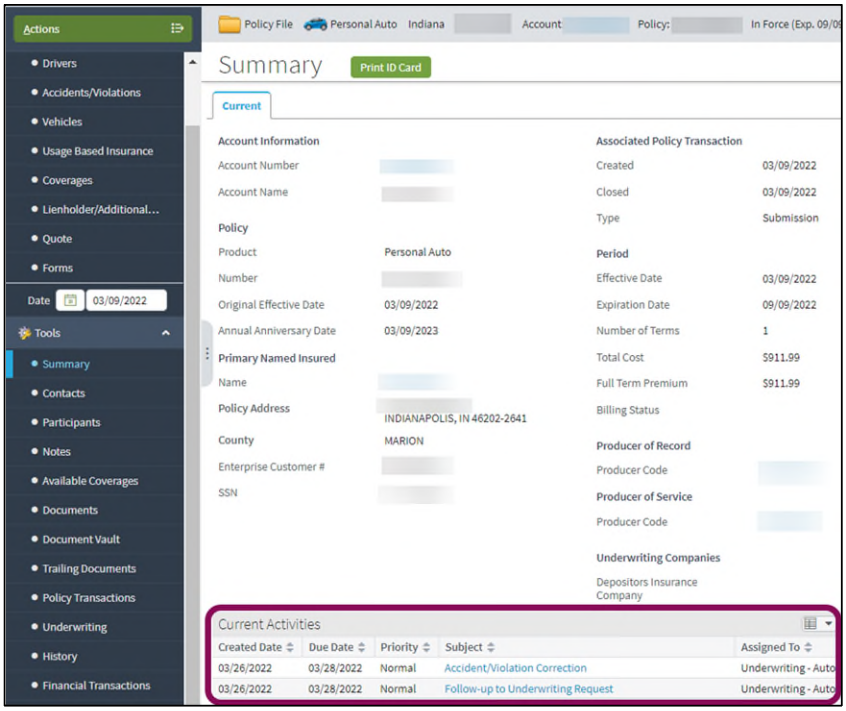
- Enter the desired information in the following fields:
    - o Topic
    - o Subject
    - o Text
- The “Related To” field defaults to the policy number.
- Select the “OK” button.

Screen



Create an Activity to Reply to Underwriting, continued

Step 7

Action	Screen
Once you have sent the activity: • View the “Current Activities” section on the “Summary” screen. In the “Current Activities” section, the recently-created activity displays. The recently-created note also displays in the “Notes” section on the “Summary” screen.	

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