Rewrite Process

AM/Jr AM - CS - AMS Population

Working from Renewal task or New task:

➔ Collect updated information
➔ **(AM)** creates a task (if not working renewal)
➔ Complete applications & ACORDS (if applicable)
➔ Submits to carrier/underwriter
➔ Complete any subjectives for underwriter approval
➔ Obtain approved quotes
➔ Present quote to customer
➔ Obtain signatures & payment (upload to account in Layr)
➔ Request issuance/bind

<mark>(Task is notated and updated with each action)</mark>
<mark>(Updating renewal status for every step)</mark>

Once binder/policy documents are received:

➔ In Layr, go to the **Renewal Pending** policy line of business & click the 3 blue dots, then 'Edit Policy'. <mark>(leave expiring term as "Expired")</mark>

GENERATE DOCUMENT ⋮

3AA671177 **G** Renewal Pending

Policy Type	Effective Date	Expiration Date	Carrier	Issuing Carrier	Pa...
General Liability	05/19/2024	05/19/2025	U.S. Risk Insuranc...	Evanston Insuran...	In...

Contact Name	Policy Cost	Payment Type	Account Manager Email		
Jeremy Richards	$0.00	Agency	lisbeth.garces@la...		

Add Endorsement/Audit

Edit Policy

Copy and Create New

Cancel Policy

➔ Update all new policy information.
➔ Update Renewal status to accurate action.
➔ Status Reason:
  ◆ Renewal = 'Active rewrite'
  ◆ Midterm = 'Canceled/Re-written'

4/2024

- ➔ **(AM)** Upload binder/invoice at the account level
- ➔ Name document accurately - YY-YY- LOB - Binder/Invoice
- ➔ **(AM)** Assigns task to the AMS team member
- ➔ **(AMS)** updates partner portal
- ➔ **(AMS)** assigns back to **AM**/**CS** team, awaiting policy documents

Once Policy documents are uploaded at policy line:
- ➔ **(AM/CS)**Uploads the policy in Layr at the policy level
- ➔ Name document accurately - YY-YY-LOB-Policy
- ➔ **(AM/CS)**Assigns the task to the AMS team member
- ➔ **(AMS)** uploads documents to partner portal, notates & completes tasks.

For every action taken on a task, clear notation, dates and links should be included in chronological order from bottom up. Along with your full name at the end of each notation See Example below..

Task assigned to Cecilia Bobadilla   **Actions** ▾   Dec 11, 2023 at 8:00 AM

✓ ~~Policy - Jefferson River Canoe Trail DBA Jefferson River Chapter Lewis & Clark Trail Heritage Foundation - First W.~~

Due date

📅 12/11/2023   ⏰ 8:00 AM

Reminder

No reminder ▾   ☐ Set to repeat

Type   Priority   Queue   Assigned to

To-do ▾   ● High ▾   None ▾   Cecilia Bobadilla ▾

12/07/2023 - Policy renewed; partner's AMS is up to date - **@Cecilia Bobadilla**

12/06/2023 - Policy is in portal. please add to epic - **@Cecilia Bobadilla**

12/06/2023 - Sent follow up to UW for policy document - **@Jennifer Griffin 4263878 - Pending Policy**

https://app.hubspot.com/live-messages/9438467/inbox/5713665463#email

11/02/2023 - Sent follow up for policy document, UW advised it can take up to 30 days - **@_Jennifer Griffin 4263878_** - **Pending Policy**

https://app.hubspot.com/live-messages/9438467/inbox/5713665463#email

11/02/2023 - Unable to renew current policy term, no policy documents in Layr portal. Please update Layr portal and return to AMS Pop team to renew - **@Cecilia Bobadilla**

11/02/2023 - Sent follow up for policy document, UW advised it can take up to 30 days - **@_Jennifer Griffin 4263878_** - **Pending Policy**
https://app.hubspot.com/live-messages/9438467/inbox/5713665463#email