

Francis Tagawa

Subject: Updated Commercial Lines IR Workflow - Endorsement Process
Attachments: IR Workflow CL - Endorsement Process (2014 Feb).docx

From: Alvina Miyasato
Sent: Monday, February 03, 2014 9:48 AM
To: Kari Yamada; Richard Fukeda; Sharon Hodson; Velma Tsuda; Jacinda Elias; Lance Kawano
Cc: Kathy Kano; Bobbie Erickson; IRHelp
Subject: Updated Commercial Lines IR Workflow - Endorsement Process

Please forward to appropriate Commercial Lines staff.

Effective: 2/3/2014

A new step has been added to IR workflow "Endorsement Process" and the use of an existing step has changed. Now the workflows will better align with the intent of the task.

In the past, there may have been some confusion with selecting the correct AA step to send an endorsement request to the carrier versus a non-premium endorsement to the insured. Although both sounded like "processing", the non-premium was set up to go to "invoicing" then selecting the correct user name.

Going forward, these are the 3 step selections:

AA Endorsement Request – send an endorsement request to the carrier/broker. (new step)

AA Endorsement Invoicing – issue an Agency Bill invoice. (no change)

AA Endorsement Processing – send a non-premium endorsement issued by carrier/broker to Insured. (new useage of existing step)

Attached is a comparison chart on prior and new CI & CM workflows with changes in red.

Email and attachment will be filed in Pueo > Document Management System > Training and Reference Documents > "CL IR Endorsement Workflow Change – Independent and House 2/2014)"

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