

**IMAGERIGHT  
DOCUMENT REFERENCE GUIDE**

**Commercial Lines - House and Independent**

<b>Document Type</b>	<b>Insured Copy/Original to Acct Mgr after Scanning</b>	<b>Where to file in ImageRight File Structure (Folder/Subfolder)</b>	<b>Sample documents include but not limited to:</b>
Accounting discrepancies		Client/Policy Term /Policy /Accounting Discrepancies	Any email from Carriers or Acctg
Auto Affidavit	Original	Client/Policy Term/Policy/Policy Correspondence	Affidavit
Alarm Certificates/Info	Original	Client/Core	Alarm/Sprinkler certificates
Applications		Client/Submission.Quote/Market (by carrier)	
Appraisals		Client/Core	Appraisal/Photo
Audit Correspondence to agency or to insured		Client/Policy Term/Policy/Policy Correspondence	
Audits	Insured Copy	Client/Policy Term/Policy Doc	Audit
Auto ID cards	Insured Copy	Client/Policy Term/Policy/Policy Correspondence	
Binders including all correspondence		Client/Submission.Quote	Binder/Correspondence
Brochures		Client/Core	Client News Articles
Broker/agent of record letter	Original	Client/Core	AOR
Business income worksheet		Client/Submission.Quote/Market (by carrier)	Worksheet
Business income worksheet (non-marketed)		Client/Policy Term/Policy/Policy Correspondence	
Cancellation - Correspondence to agency, to carrier or to insured.		Client /Policy Term/Policy/Policy Correspondence	Cancellation/Reinstatement
Cancellation - NOC; Proof of mailing (issued by Atlas)		Client/Policy Term/Policy/Policy Docs	Cancellation/Reinstatement
Certificates - ACORD (not with Policy, Binder or Endt)		Client/Policy Term/Certificates/Certificate	
Certificates - Specialty (not with Policy, Binder or Endt)	Original	Client/Policy Term/Certificates/Certificate	Specialty Certificate
Checks from Insured, Carrier or Finance Co.	Original	Client/Policy Term/Policy/Policy Correspondence	Checks
Claims Notice of Loss		Client/Claims Occurrence	
Contracts - Leases		Client/Core	
Contracts - in connection with <b>job</b> Certificate request		Client/Policy Term/ Certificates (keep with Certificates doc)	
Contracts - all others not relating to leases or certificates		Client/Policy Term/Contracts	lease, or job not taken
Coverage Checklists		Client /Policy Term/Policy/Policy Correspondence	Coverage Checklist
Direct bill notices/Late payment notice		Client /Policy Term/Policy/Policy Correspondence	Notices
Email (print attachments to Image Right)		Client /Policy Term/Policy/Policy Correspondence	

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Endorsement change request to carrier		Client /Policy Term/Policy/Policy Correspondence (only if no cert)	(enter note: see Cert folder)
Endorsement from carrier	Insured Copy	Client /Policy Term/Policy/Policy Doc	Endorsement/carrier inv/ltr
Endorsement request from client		Client /Policy Term/Policy/Policy Correspondence (only if no cert)	(enter note: see Cert folder)
Evidence of Property (EPI)		Client/Policy Term/Certificates	
Experience Mod		Client/Core	Mod sheet
Exposure Review Letters to Client		Client/Submission.Quote/Market (by carrier)	
Exposure Reviews from Client		Client/Submission.Quote/Market (by carrier)	Coverage Checklist
Filings (e.g. OS32, MCS90)	Insured Copy	Client/Submission/Quote/Market (by carrier)	Filings
Financial statements/information		Client/Core	Financials
Handbooks (e.g. Employee)		Client/Core	Handbook/Safety Manual
Invoice from Broker/Carrier		Client /Policy Term/Policy/Policy Correspondence	
Late payment notices		Client /Policy Term/Policy/Policy Correspondence	
Loss Control Recommendations/Reports		Client /Core/ Survey.Photo doc type	From carrier, including compliance correspondence
Loss runs (for Marketing Purposes)		Client/Policy Term/Submission.Quote/Market (by carrier)	Loss Runs for renewal marketing
Loss runs (Non Marketing)		Client/Claims/Review/Loss Runs/Non Marketing Loss Runs	Quarterly or Monthly runs
LPR - ACORD 35	Original	Client /Policy Term/Policy/Policy Correspondence	
Marketing correspondence to or from agency		Client/Submission.Quote/Market (by carrier)	Marketing Correspondence
Miscellaneous Client Letters		Client /Policy Term/Policy/Policy Correspondence	
MVR report		Client/Submission.Quote/Market (by carrier)	MVR
MVR request		Client/Submission.Quote/Market (by carrier)	Correspondence
News Articles re: clients		Client/Core	Client News Articles
Non-renewal notice		Client /Policy Term/Policy/Policy Correspondence	Cancellation/Reinstatement
OCIP Enrollment Manual		Client/OCIP/Enrollment	Manual
OCIP Contracts/leases/ bid specs		Client/OCIP/Administration	Project Info
OCIP Certificates/Correspondence		Client/OCIP/Master Enrollment	COI from subs/signed forms/enrollment log

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Phone conversations		Client /Policy Term/Policy/Policy Correspondence	Correspondence
Photos		Client/Core	Appraisal/Photo
Policy	Insured Copy	Client /Policy Term/Policy Doc	Policy Document
Policy Change Request - ACORD 175		Client /Policy Term/Policy/Policy Correspondence	
Policy cover letter to client		Client /Policy Term/Policy/Policy Correspondence	
Policy memo to producer		Client /Policy Term/Policy/Policy Correspondence	
Policy Quality Checklist		Client /Policy Term/Policy/Policy Correspondence	Policy Checklist
Premium Allocations		Client/Policy Term/Premium Allocation	
Premium finance agreements	Original	Client /Policy Term/General Correspondence	Finance Agreement
Premium finance billing notices		Client /Policy Term/General Correspondence	Notices
Proposal	Insured Copy	Client/Submission.Quote	Proposal and w/notes (if any)
Quotes from carrier		Client/Submission.Quote/Market (carrier)	Quote
Reinstatement notice		Client /Policy Term/Policy/Policy Correspondence	Notices
Reporting Form Adjustments and any correspondence	Insured Copy	Client /Policy Term/Policy/Policy Correspondence	Cargo Reports
Retro Adjustments and Documents		Client/Retro	Retro Plan Retro Adjustment Correspondence to Client
Safety Manual		Client/Core	Handbook/Safety Manual
Schedules-equipment/driver/vehicle,etc	Insured Copy	Client/Submission/Market (carrier)	Application
Sprinkler Information		Client/Core	Alarm/Sprinkler Info
Submission cover letter		Client/Submission/Market (carrier)	Marketing Correspondence
Summaries	Insured Copy	Client /Policy Term/Submission/Quote	Proposal/Summary
Surplus Lines Forms	Insured Copy	Client/Submission/Market (by carrier)	
Surveys		Client/Core	Surveys
Terrorism Forms signed by Insd		Client/Policy Term /Submission/Correspondence	TRIA
UM/UIM Forms signed by Insd		Client/Policy Term/Policy/Policy Correspondence	UM/UIM Forms