

COMMERCIAL LINES DOCUMENTATION REFERENCE GUIDE

ImageRight Folders/Subfolder	ImageRight File Subfolder/Documents	Documents include but not limited to:
Policy Term	Policy	<ul style="list-style-type: none"> • Actual Policy documents <ul style="list-style-type: none"> ○ Policy ○ Endorsement ○ Audit ○ Cancellation ○ Reinstatement <p>If the invoice and or binder is attached to the above it will be filed together with the document above.</p>
Policy Term	Policy Correspondence	<ul style="list-style-type: none"> • Endorsement request from insured/agent & to carrier without certificates • Audit correspondence from insured. Correspondence to agency or to insured • Cancellation correspondence from insured - requests to carrier (LPR's) • Patra checklist • Direct Bill Payment reminders / Late Notices • Coverage checklist • Non Renewal notices • Any correspondence to insured
Policy Term	Certificates	<ul style="list-style-type: none"> • Certificates including ID Cards <ul style="list-style-type: none"> ○ Correspondence from insured / agent ○ Carrier Approvals ○ Endorsement request to carrier

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Policy Term	Submission/Quote	<ul style="list-style-type: none"> Correspondence (Repeatable file) <ul style="list-style-type: none"> New Business and or Renewal Marketing correspondence from insured; to insured
Policy Term	Market	<ul style="list-style-type: none"> Correspondence (Repeatable file) <ul style="list-style-type: none"> All Correspondence by Market Quotes
Policy Term	Market / Application	<ul style="list-style-type: none"> Applications / Supplemental Applications
Policy Term	Proposal/Summary	<ul style="list-style-type: none"> Proposal Summary
Policy Term	Market / MVR	<ul style="list-style-type: none"> MVRs
Policy Term	Market / Loss History	<ul style="list-style-type: none"> Loss Runs (for Marketing)
Policy Term	Market / Binder	<ul style="list-style-type: none"> Request to bind from Insured Request to bind to carriers Bind confirmations Binders & invoices without the policy
Policy Term	General Correspondence	<ul style="list-style-type: none"> Excel Schedules – SOV, equipment/driver/vehicle, etc Correspondence regarding the entire account – not coverage/policy specific Premium loss summaries
Policy Term	Contracts	<ul style="list-style-type: none"> Any insured contracts review request
Policy Term	Premium Allocations	<ul style="list-style-type: none"> Premium allocation sent to insured
Policy Term	Accounting	<ul style="list-style-type: none"> Authorization to apply credits Authorization to Chargeback Premium Finance <ul style="list-style-type: none"> Request to accounting Approved finance contract
Policy Term	Accounting Discrepancies	<ul style="list-style-type: none"> Accounting correspondence regarding discrepancies

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Core File		<ul style="list-style-type: none"> Financials Surveys / Photos Loss Control Recommendation/Inspections AOR/BOR Optional Coverage Recommendation forms Authorization to Bind Forms Appraisals Employee handbooks Safety Manual Alarm Certificates/Info Sprinkler Information Contracts (ex. lease agreement) Ex Mod
OCIP		<ul style="list-style-type: none"> Enrollment Administration Master Enrollment
RETRO		<ul style="list-style-type: none"> Adjustments Correspondence Plan
Claims		<ul style="list-style-type: none"> Claims Notice of Loss File down by loss date Review/Loss Runs <ul style="list-style-type: none"> Claims Reviews Non Marketing loss runs
Loss Control		<ul style="list-style-type: none"> Presentations
Backscan		<ul style="list-style-type: none"> Any documentation prior to Atlas as the agent or documentation prior to IR integration