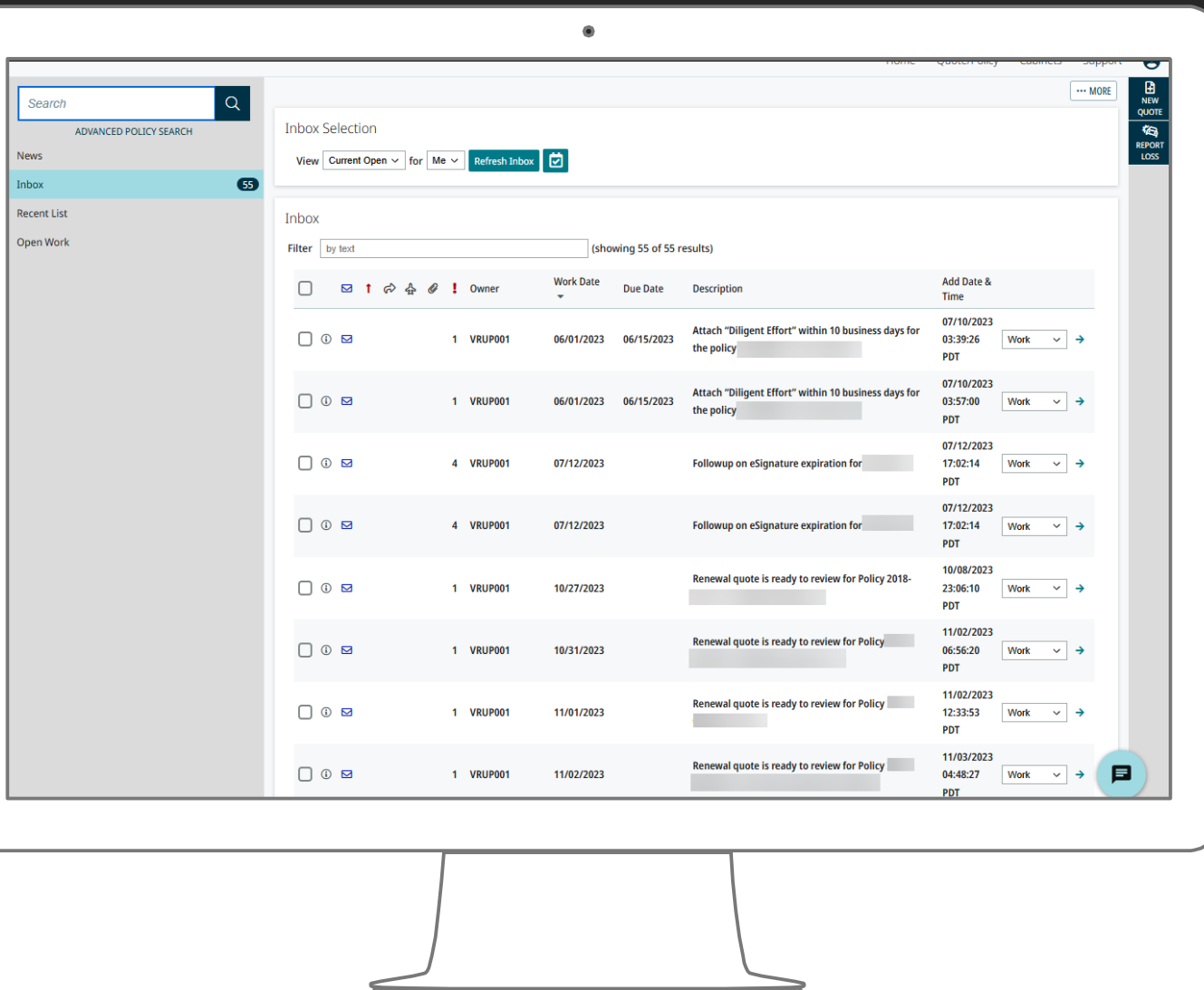


# All About Tasks and Notifications



Our policy administration system utilizes inbox tasks and email notifications to help you manage your customer's policy.

**Tasks** are used as a trigger for an activity that needs to take place. Tasks may be generated for quotes, applications, or policies. Requests for documentation, underwriting approvals and rejections are examples of tasks.

**Notifications** are sent to the producer email. Renewal / non-renewal notices, and cancellation / reinstatement notices are examples of notifications.

Tasks can be sent to the producer email by setting up a subscription.

# ATTACHMENT TASKS

Attachment tasks are requests for additional documentation. There are several type of documents that may be requested.

- Underwriting requests - these may include loss runs or certificate of occupancy.

## Steps to clear the task:

1. Click the right arrow → on the far-right side of the task. It should be defaulted to Work.
2. When the policy opens, click the **New Attachment** action button on the right.
3. Select the document type from the drop down menu.
4. Upload the requested document and click **Add Attachment**.
5. Click the ✓ **Task** button to clear the task from the inbox.

The screenshot displays the Guidewire policy management interface. At the top, there is a navigation bar with 'Home', 'Quote/Policy', 'Cabinets', and 'Support'. Below this, a search bar and 'ADVANCED POLICY SEARCH' are visible. The main content area is divided into several sections:

- Inbox Selection:** Shows 'View: Current Open' and 'for: Me'. There is a 'Refresh Inbox' button.
- Inbox:** A list of tasks. The first task is 'Attach "Diligent Effort" within 10 business days for the policy'. It has a filter 'by text' and shows 55 of 55 results. The task details include: 1 VRUP001, Work Date 06/01/2023, Due Date 06/15/2023, Add Date & Time 07/10/2023 03:39:26 PDT.
- Policy Details:** Shows 'POLICY' with details: Policy Number 2023-000252-01, Insured Test, State AL, Product Small Commercial Property, Sub Type CPP, Policy Term 10/31/2023 - 10/31/2024.
- Open Transactions:** A message states 'The following transaction is already in progress for this policy.' A table shows one transaction: AP\_00002546, Renewal Activate, Effective 10/31/2024, Status In Process, User ID admin.uat.
- Transaction History:** A table with columns: Term-Seq Number, Transaction, Description, Effective, Written Premium, In Force Premium. It shows two transactions: 2.1 Renewal Start (Effective 10/31/2024, Written Premium \$6,193.00, In Force Premium \$6,193.00) and 1.1 New Business (Effective 10/31/2023, Written Premium \$5,962.00, In Force Premium \$5,962.00).
- New Policy Attachment:** A form on the right with fields for Name\* (Loss Run), Category (General), and Description\* (Loss Run for Test). There is a 'Comments' section and a 'Select Files to Upload' button. A file 'Test Loss Runs.docx' is listed. There are 'Add Attachment' and 'Clear' buttons at the bottom.

At the bottom of the interface, there is a 'Return to Home' button and a 'Task' button with a checkmark. The footer shows 'Powered by GUIDEWIRE' and 'Environment : vru-uat Current Logon : agent(Sign Out)'.

# APPLICATION TASKS

Application tasks are generated by the system when a new quote is submitted to underwriting for an approval. Types of system tasks include:

- Application rejected. These are generated when the underwriter rejects the risk.
- Application approved. If the underwriter approves the risk the task is generated as a reminder to Issue the policy.
- Application returned. These are generated if the underwriter requires additional information for review.

## Steps to clear the task:

1. Click the right arrow → on the far-right side of the task. It should be defaulted to Work.
2. Rejected and Returned tasks - task notes from the underwriter will appear as a pop-up on the screen. Close the note and Click the ✓ **Task** button to clear the task from the inbox.
3. Approval tasks will open on the Closeout page. Click the **Issue Policy** button to bind the risk and the task will automatically be cleared from the inbox. See the **Quote Flow Guide** for details on binding.

The screenshot displays the application tasks interface. At the top, there is a search bar and a navigation menu with options like 'News', 'Inbox', 'Recent List', and 'Open Work'. The 'Inbox' section shows a list of tasks, with one task selected. A 'TASK NOTES' pop-up window is visible, displaying details for a 'New Business Application AP-00048123'. The main view shows the 'QUOTE REVIEW' section for the selected task, including 'Submitter Issues', 'Premium Review', 'Due Diligence', and 'Inspection Contact' information.

**Task Notes:**

- From: Sandy Antonicello
- Created: 11/18/2024 14:08:00 PST
- TIV for Masonry Non-Combustible at Location 1, Building - 1 exceeds authority and will require a submission to your underwriter for approval.
- Risk is approved subject to 3 years clean loss runs. Please click Issue Policy to bind the policy.
- Notes are present (3)

**Premium Review:**

Premium Type	Amount	Premium Type	Amount
Prior Full Term Premium	\$0.00	New Full Term Premium	\$25,276.00
Transaction Written Premium	\$25,276.00	Transaction Written Commission	\$0.00
<b>Total Transaction Premium</b>	<b>\$25,276.00</b>		

**Inspection Contact:**

Inspection Contact Name*	Test Contact
Phone Number*	(555) 777-8888
Email Address*	test@test.com

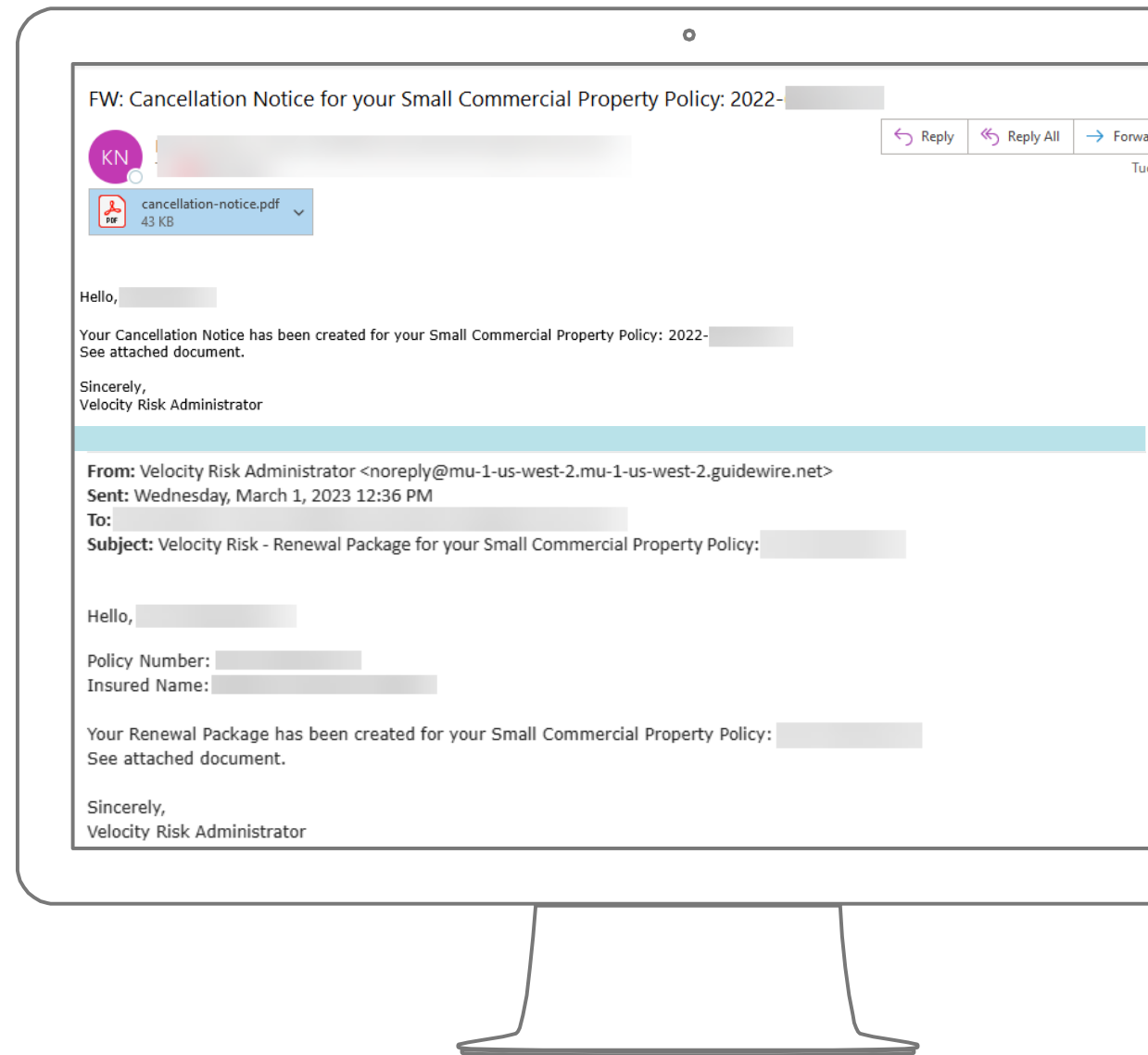
# NOTIFICATIONS

Notifications are sent directly to the producer email, not the inbox within the policy administration system.

Examples of notifications include:

- Renewal processed
- Non-Renewal notice
- Cancellation notice
- Reinstatement notice

No additional action is required as these are notifications on completed policy transactions.

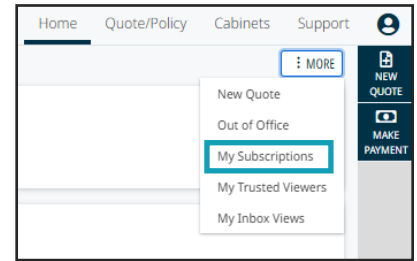


Tasks and notifications are tools you can use to effectively manage your customer's policy and ensure you are not missing important messages that may require action. Tasks may also be emailed to the producer by setting up email subscriptions.

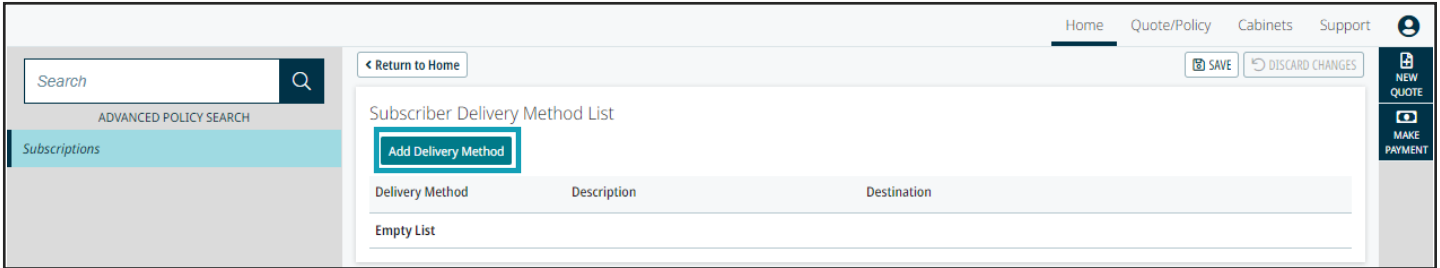
# INBOX SUBSCRIPTIONS

To receive Inbox notifications and Tasks to your email, set up a Subscription.

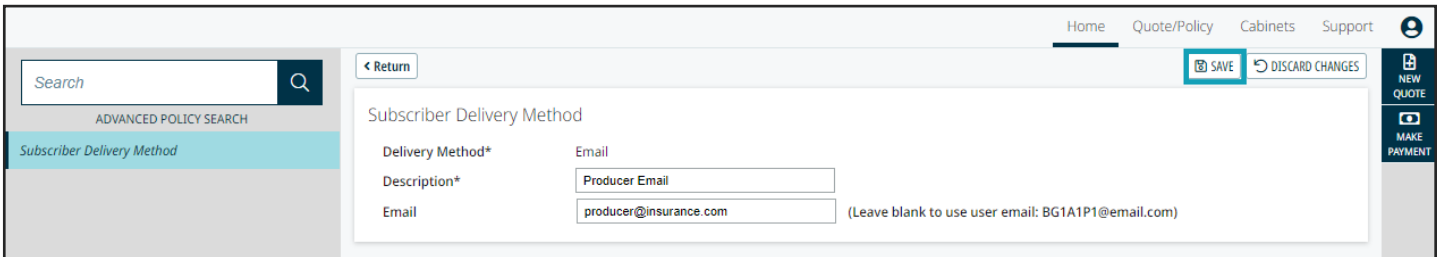
Select **My Subscriptions** from the More menu.



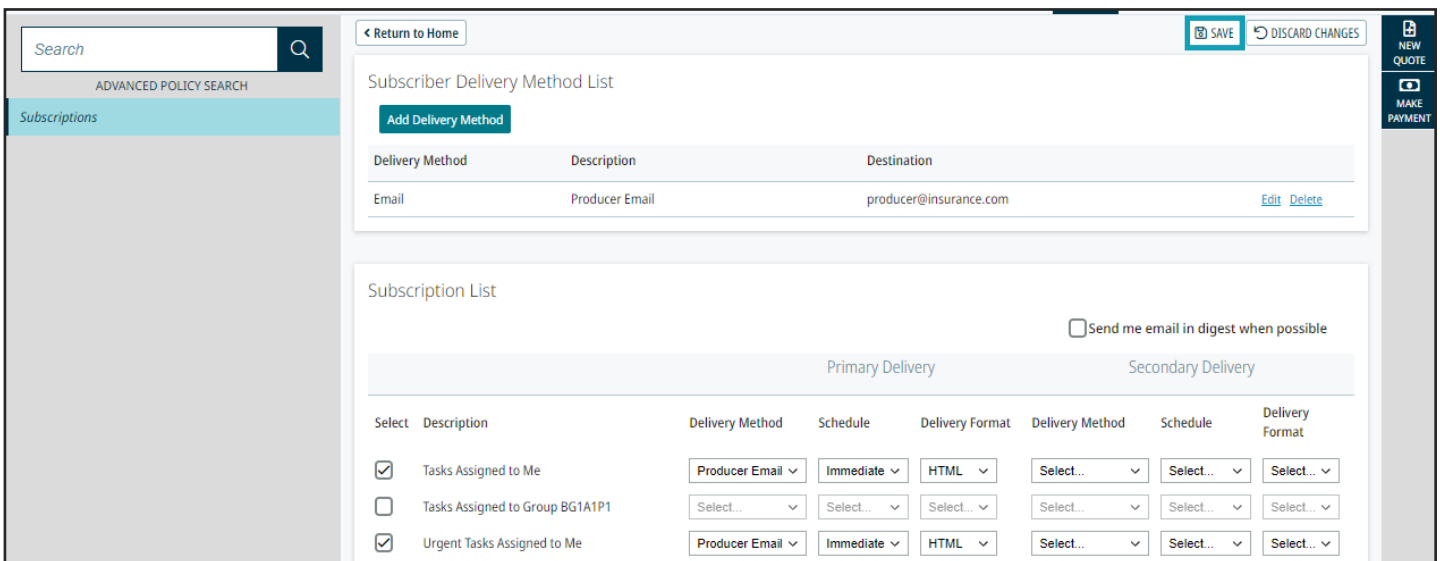
Click **Add Delivery Method** from the Subscriber Delivery Method List.



Choose the Email delivery method, enter a description, email, and **Save**. You can set up as many email delivery methods as needed.



Select the tasks from the subscription list that you wish to have sent to your email. You can choose to have these tasks sent daily or immediately when generated. Select the Primary Delivery Method email you wish the tasks to go, as well as the format (HTML or Text) and **Save** the selection.



Tasks will now be sent to the indicated email from [noreply@velocityrisk.com](mailto:noreply@velocityrisk.com). Be sure to add this email to your safe sender list.