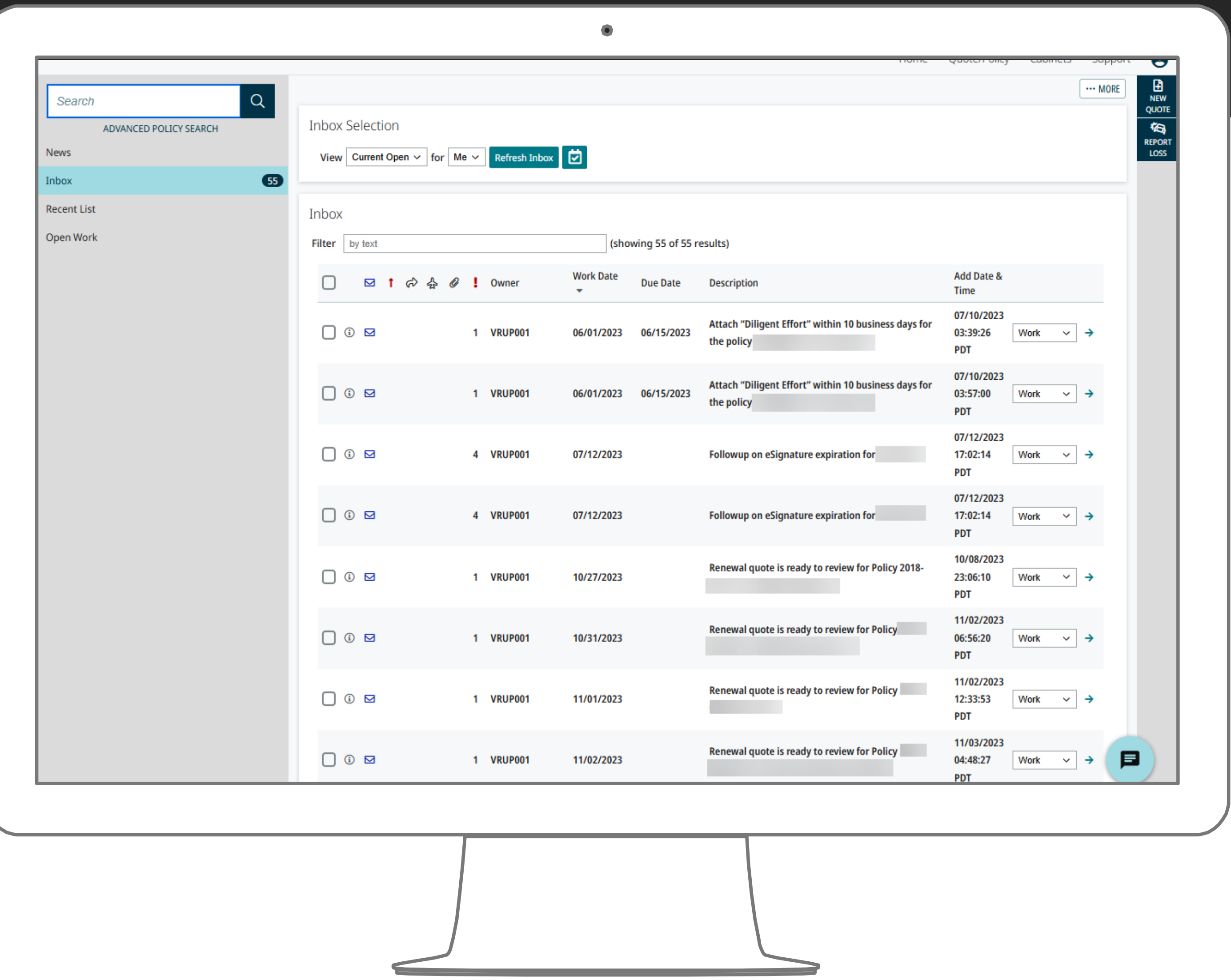
All About Tasks and Notifications



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.

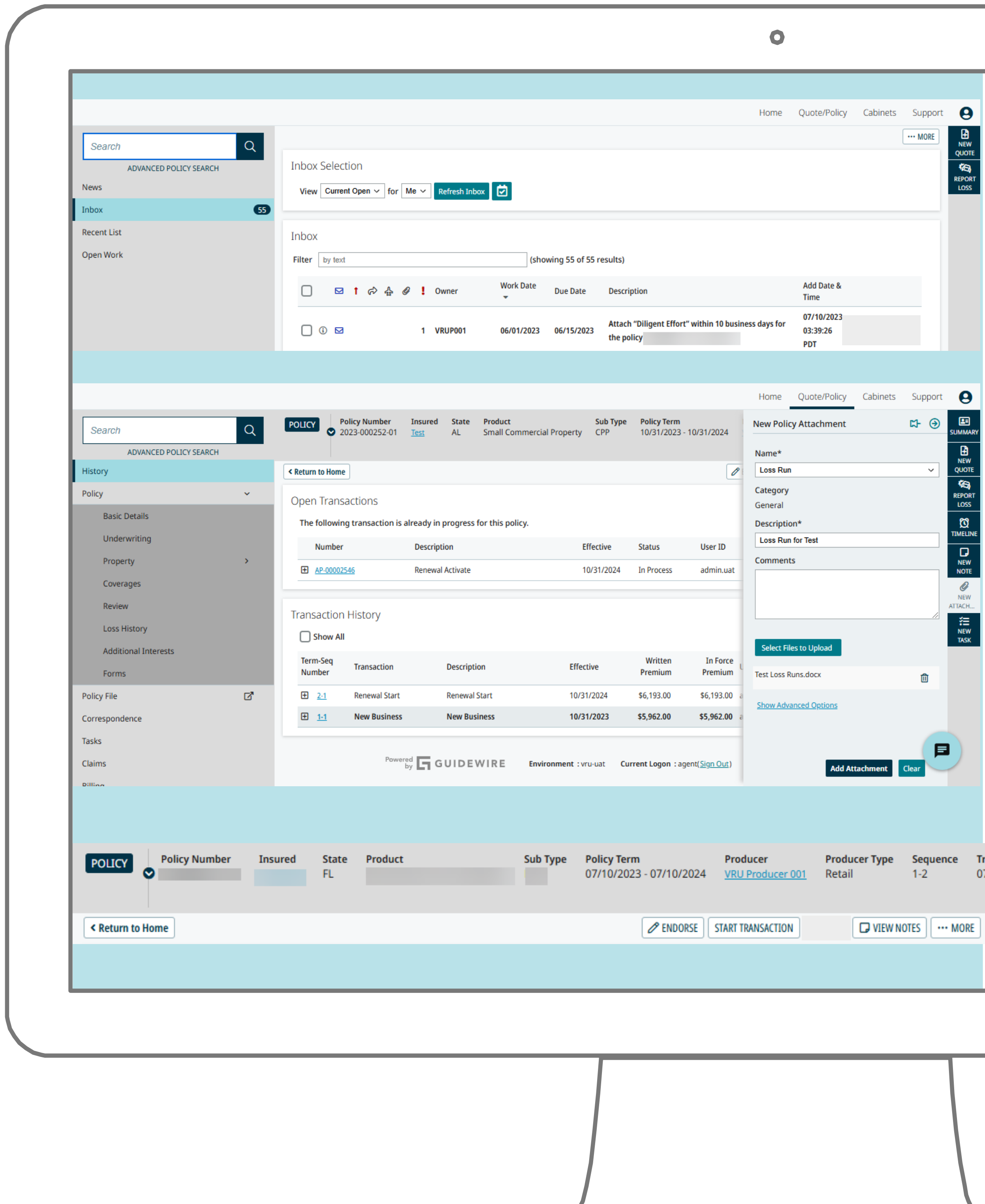
Notifications are sent to the producer email. Renewal / non-renewal notices, and cancellation / reinstatement notices are examples of notifications.

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.

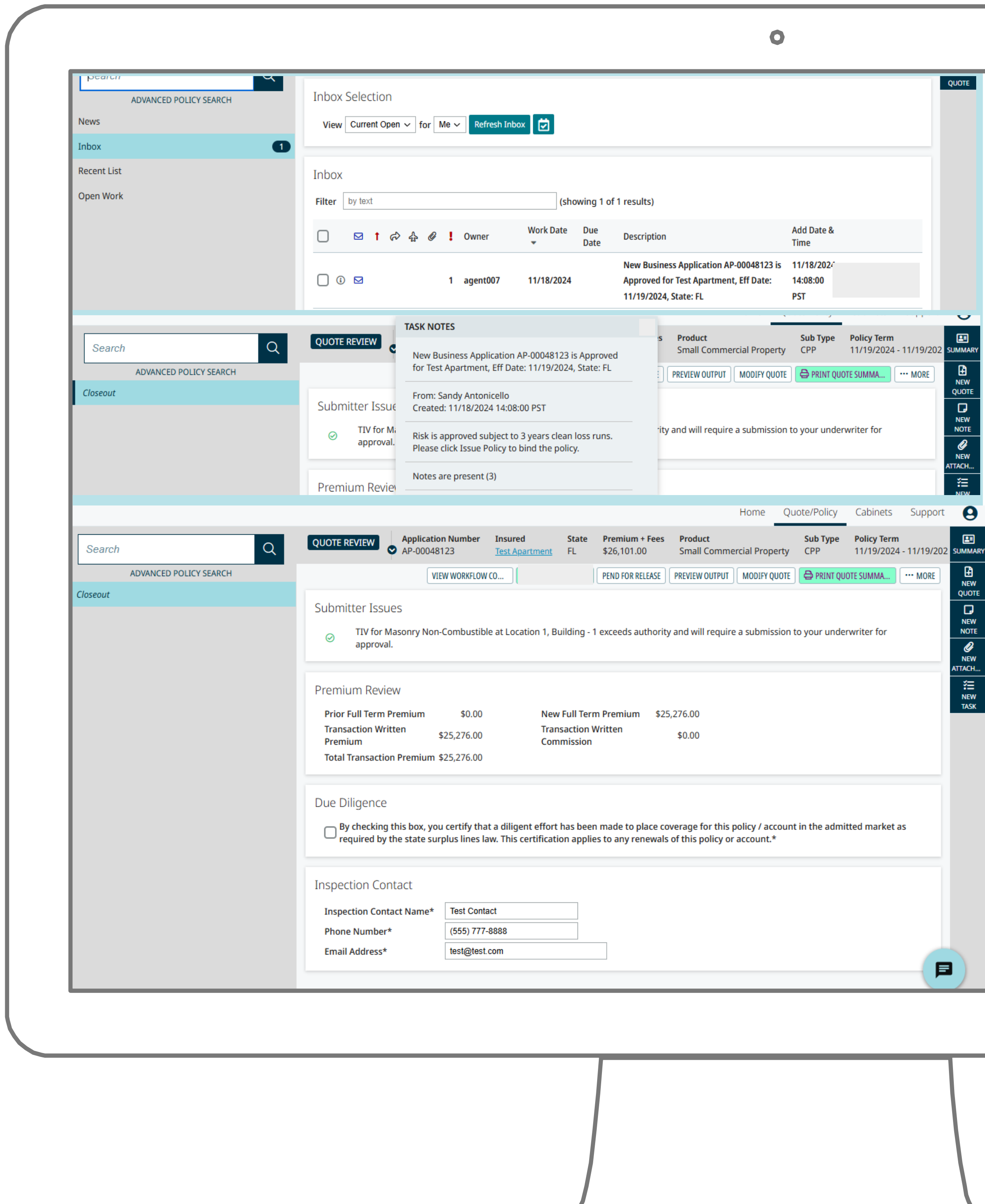
APPLICATION TASKS

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.

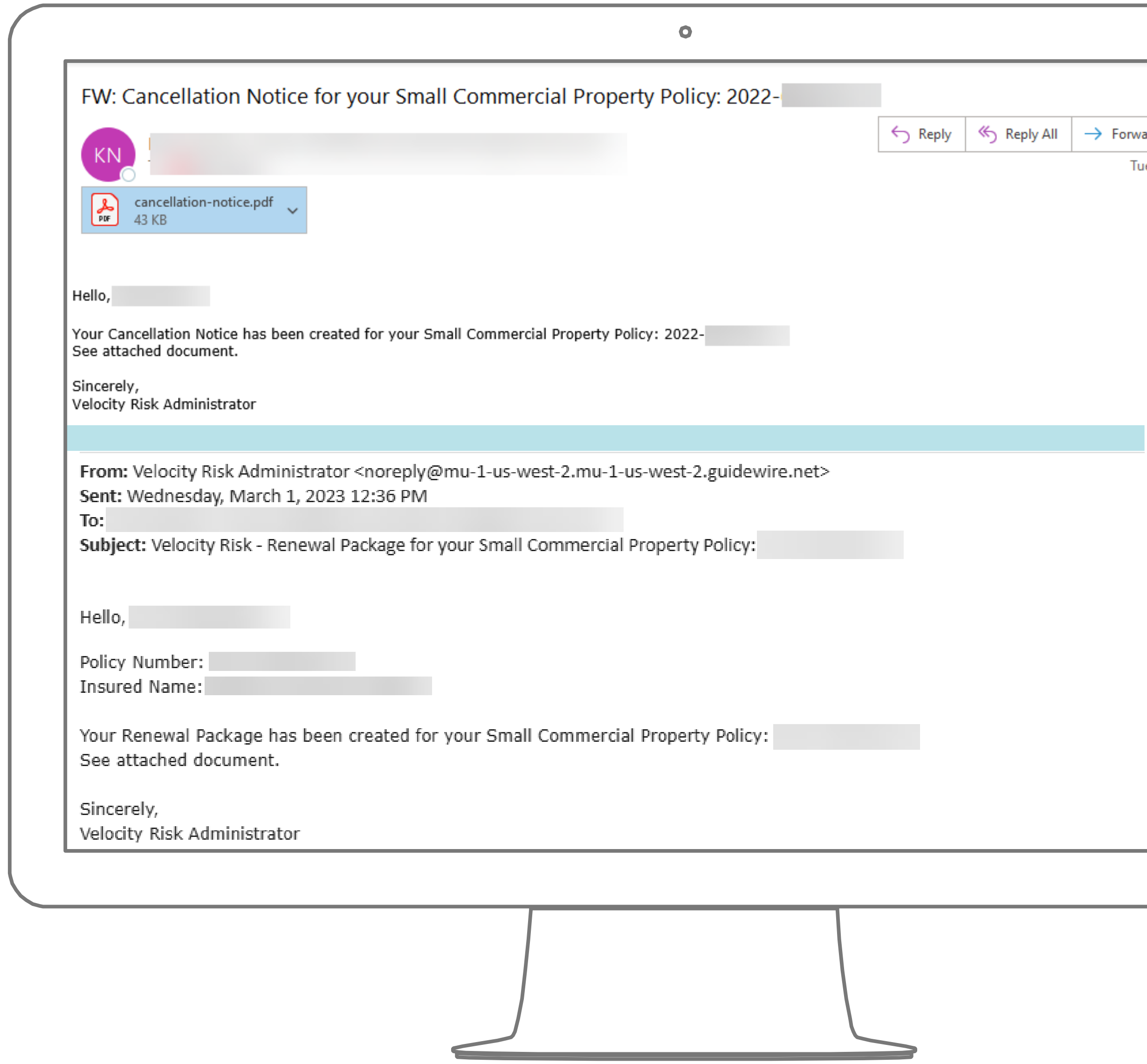


NOTIFICATIONS

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

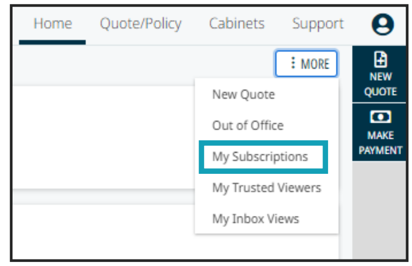
No additional action is required as these are notifications on completed policy transactions.



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.

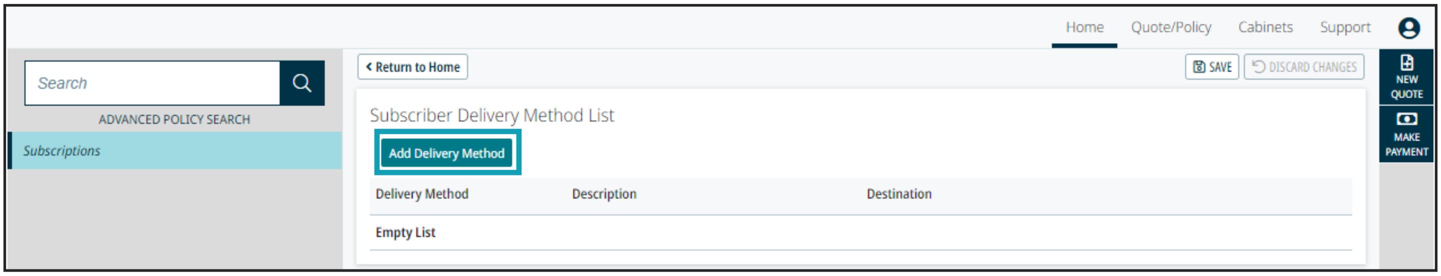
INBOX SUBSCRIPTIONS

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

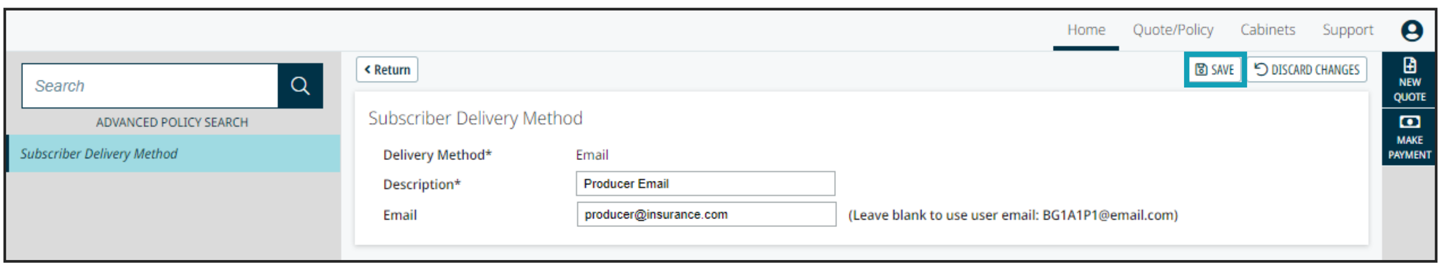


Select **My Subscriptions** from the More menu.

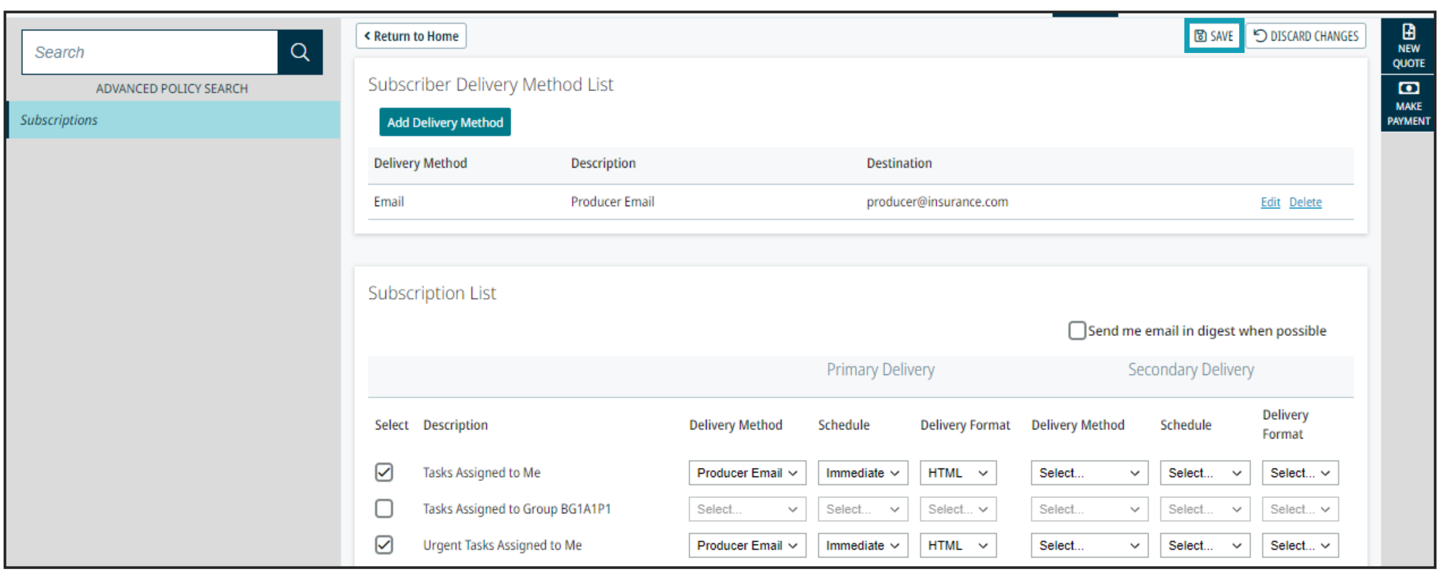
Click **Add Delivery Method** from the Subscriber Delivery Method List.



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. Be sure to add this email to your safe sender list.