
GPM DEVELOPMENT



Renewal Processing

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IMPORTANT NOTE

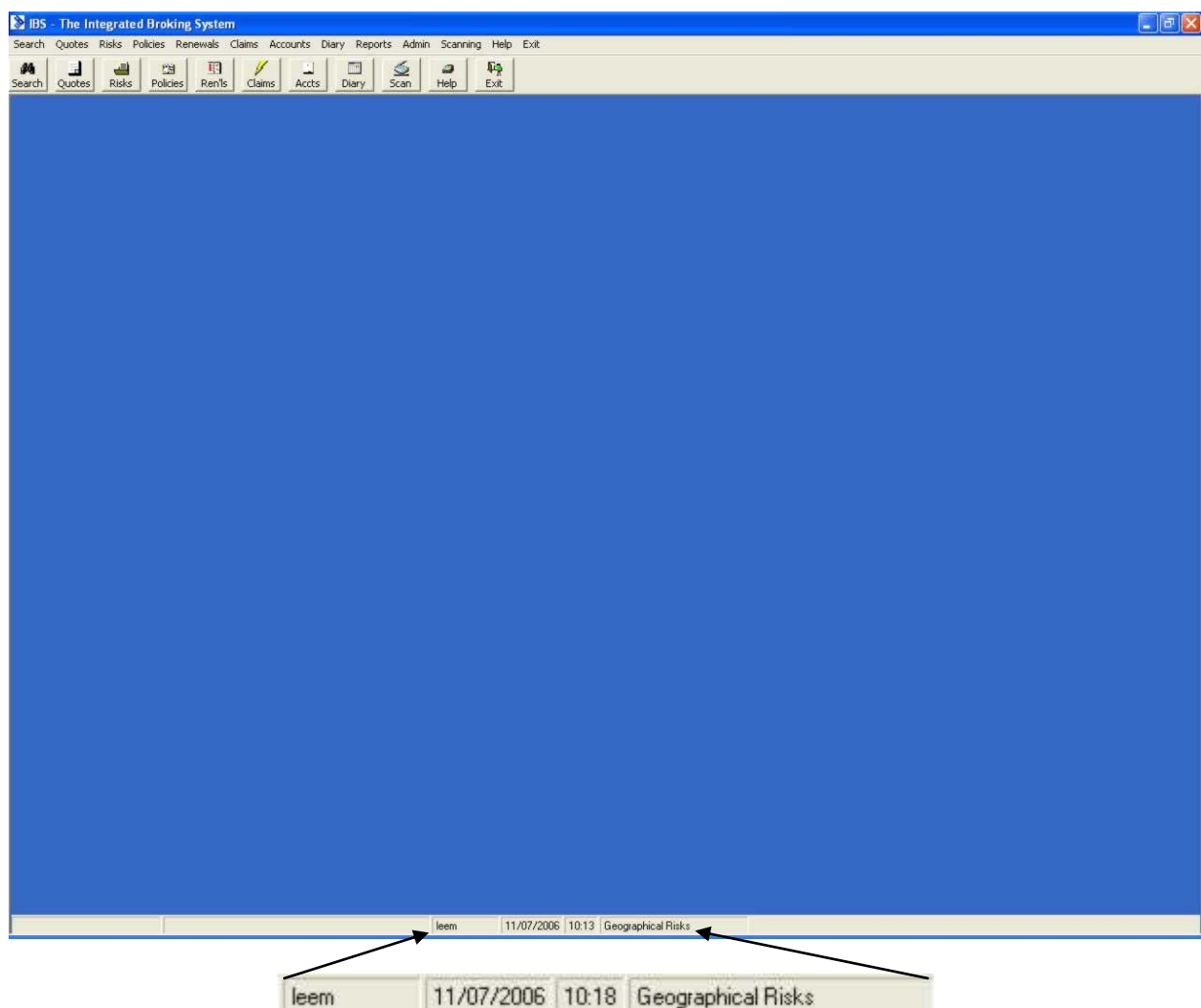
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Introduction to Windows IBS

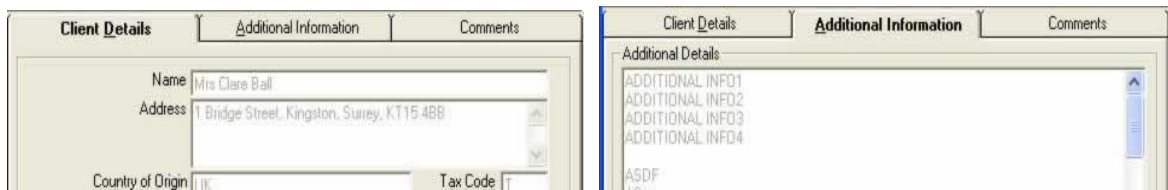
General points to note

Once you have logged into the system, your diary will appear on the screen. When first using the system, a message will appear stating that you have no diary items on file. The diary functions are described later in this manual. You can ask your administrator to turn your diary off if you do not think that you will use it.

The current user logon, date, time and Department are shown on the main window.

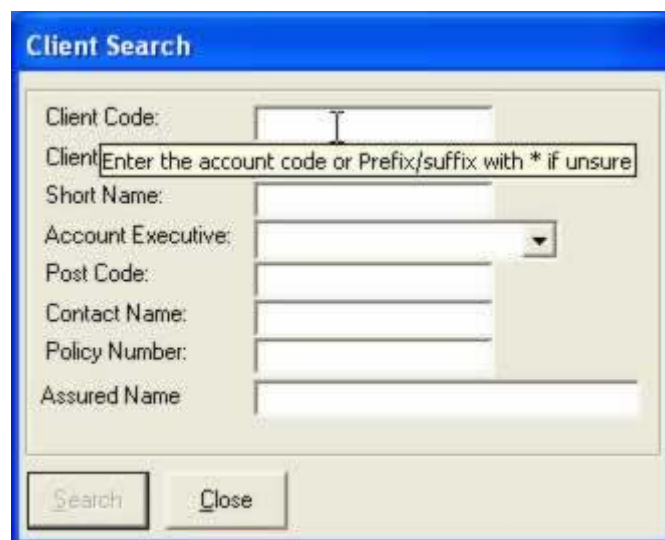


Some screens have multiple pages or 'tabs' as they are referred to in the manual. To view or edit details on another tab, click your mouse at the top of the tab or use the shortcut key.



Some options or commands are displayed with one of the characters underlined – a shortcut key. To access this command without using the mouse, hold down the Alt key and press the underlined letter.

Some of the fields and menu options have tool tip text to assist you when entering data. This is pop up text which appears when the mouse is focused on a field for a period of time.



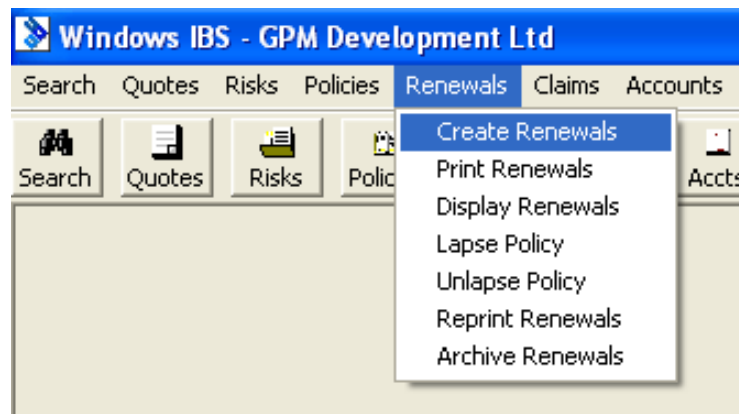
There are various search screens in the system. Processing a search where the same search criteria is typed in upper, lower or initial case (i.e. if you are searching for Mr John Smith, you would type in j s or J S as the first letter of each name) will produce the same results.

When entering data into a drop-down field, typing the first character of the word in the list you want to select may be a quicker way of selecting text if the list is long.

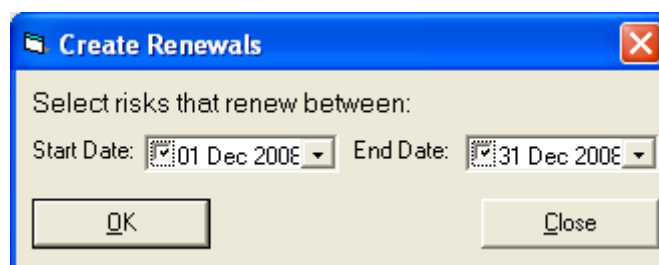
You will also notice within the IBS system this icon  (A box with three dots (...)). This icon allows you to search for the available data required for that field i.e. An Account Code or Client Name. It will take to a search box like the one above.

Renewal Processing

Create Renewals

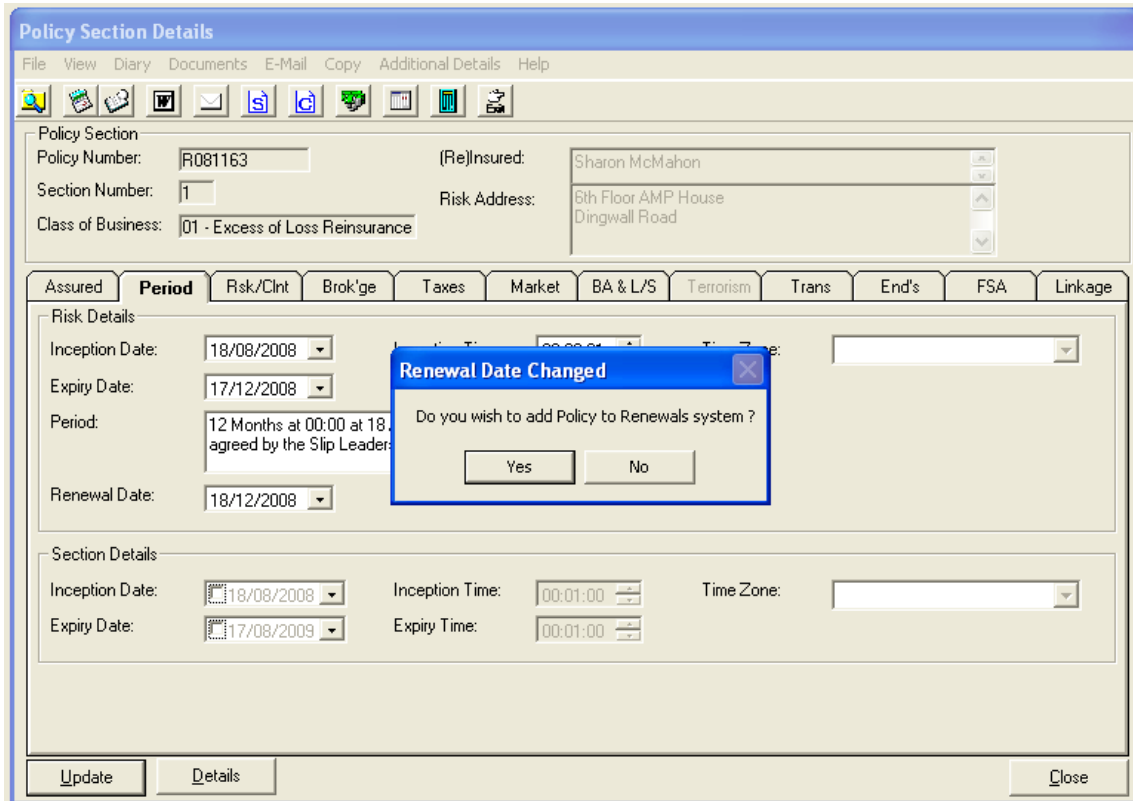


On the renewal menu select the first option Create Renewals and enter the start and end date for the renewals that you wish to produce a listing for and select OK.



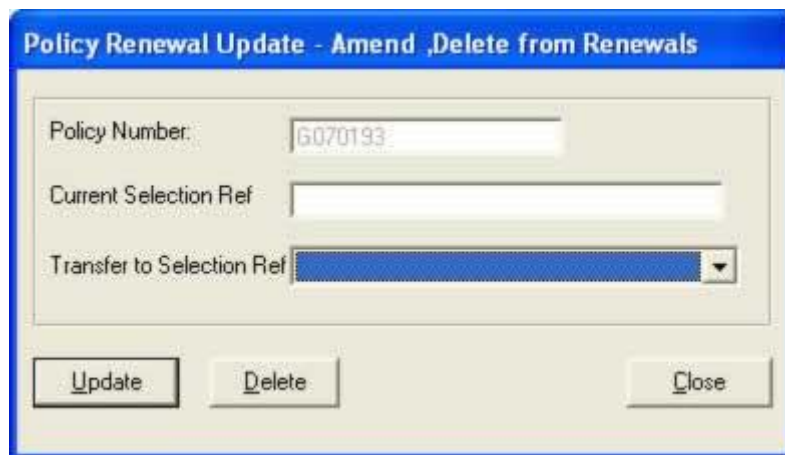
Please note that this only has to be done once for the whole database for the dates selected. Once it has been done for a particular period, any policies added, or updated, which have a renewal date falling into a period that has already been run, will need to be added to the renewals list, or rerun this process again

If the policy is amended through the main Policy screens then the system will automatically ask whether you wish to add to a renewals list or move to another one.



The screenshot shows the 'Policy Section Details' window. The 'Policy Section' tab is active, displaying fields for Policy Number (R081163), (Re)Insured (Sharon McMahon), Section Number (1), Risk Address (6th Floor AMP House, Dingwall Road), and Class of Business (01 - Excess of Loss Reinsurance). Below these are tabs for Assured, Period, Risk/Cnt, Brok'ge, Taxes, Market, BA & L/S, Terrorism, Trans, End's, FSA, and Linkage. The 'Risk Details' section shows Inception Date (18/08/2008), Expiry Date (17/12/2008), Period (12 Months at 00:00 at 18/08/2008), and Renewal Date (18/12/2008). A dialog box titled 'Renewal Date Changed' is overlaid, asking 'Do you wish to add Policy to Renewals system?' with 'Yes' and 'No' buttons. The 'Section Details' section shows Inception Date (18/08/2008), Inception Time (00:01:00), Time Zone, Expiry Date (17/08/2009), and Expiry Time (00:01:00). At the bottom are 'Update', 'Details', and 'Close' buttons.

Upon selecting Yes the following screen will then be displayed.

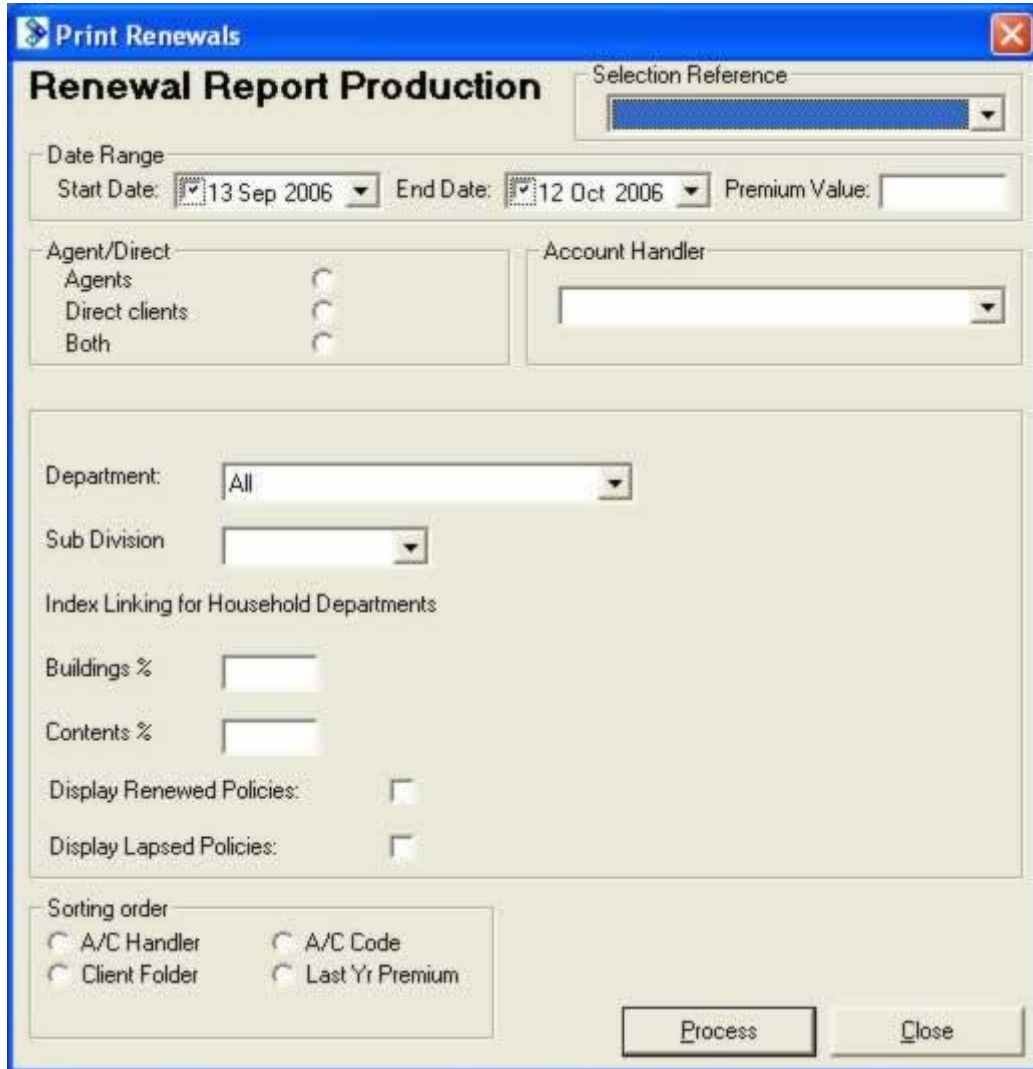


The screenshot shows the 'Policy Renewal Update - Amend ,Delete from Renewals' window. It contains fields for Policy Number (G070193), Current Selection Ref, and Transfer to Selection Ref (a dropdown menu). At the bottom are 'Update', 'Delete', and 'Close' buttons.

If the policy is already on a renewal list, this will be displayed in the middle box. Select the renewal that you wish to move it, in the bottom box. Click on update when completed. The renewal will then be moved to the new list.

Print Renewals

On the Renewals menu select the second option Print Renewals to display the following screen:-



The screenshot shows a window titled "Print Renewals" with a sub-header "Renewal Report Production". The form includes the following fields and options:

- Selection Reference:** A dropdown menu.
- Date Range:**
 - Start Date: 13 Sep 2006
 - End Date: 12 Oct 2006
 - Premium Value: (empty text box)
- Agent/Direct:** Radio buttons for Agents, Direct clients, and Both.
- Account Handler:** A dropdown menu.
- Department:** A dropdown menu set to "All".
- Sub Division:** A dropdown menu.
- Index Linking for Household Departments:**
 - Buildings %: (empty text box)
 - Contents %: (empty text box)
- Display Renewed Policies:** A checkbox.
- Display Lapsed Policies:** A checkbox.
- Sorting order:** Radio buttons for A/C Handler, A/C Code, Client Folder, and Last Yr Premium.
- Buttons:** "Process" and "Close".

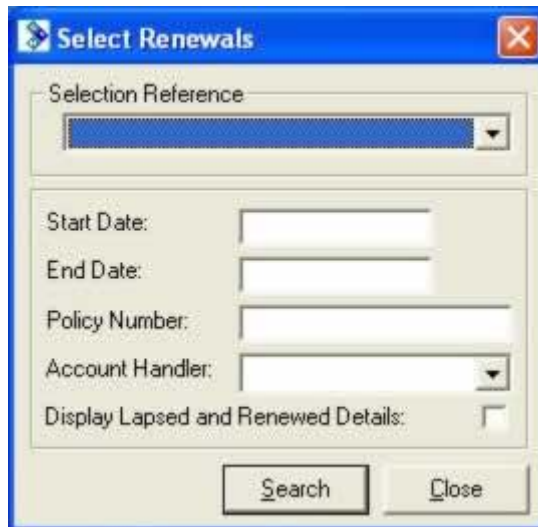
The above screen allows the previously selected renewals list to be split out further according to the criteria selected.

The first set of dates will select all renewals between the two dates; this screen will allow you to produce separate reports by department/subdivision/account handler and give each version of the list a unique reference to be used by the department or subdivision. If you are producing renewal lists for Household Class of Business's you have the option to increase the sums insured automatically so that when you produce the renewal quote the sums insured will be updated. The Buildings and Contents Fields have been set up on the Table Files. Once you have selected your criteria select Process. You will then be prompted to give this renewal report a name. We recommend that you use something that any user would understand i.e. GLMSept06 where G is the department letter, LM is the user initials and Sept06 is the month the renewals are for, obviously you can use your own code but this will give you an idea. Once a name has been selected click OK to proceed and a renewal report will be produced in MS Excel.

This report can be rerun at any time by calling up Print Renewals and selecting your unique reference from the dropdown selection reference field and Process. When rerunning a previously created listing to MS Excel you will not be prompted to rename the listing. All policies added to the renewal list will be marked with the text 'Renewals List' and this text will change depending on the stage of the policy in the renewal process.

Display Renewals

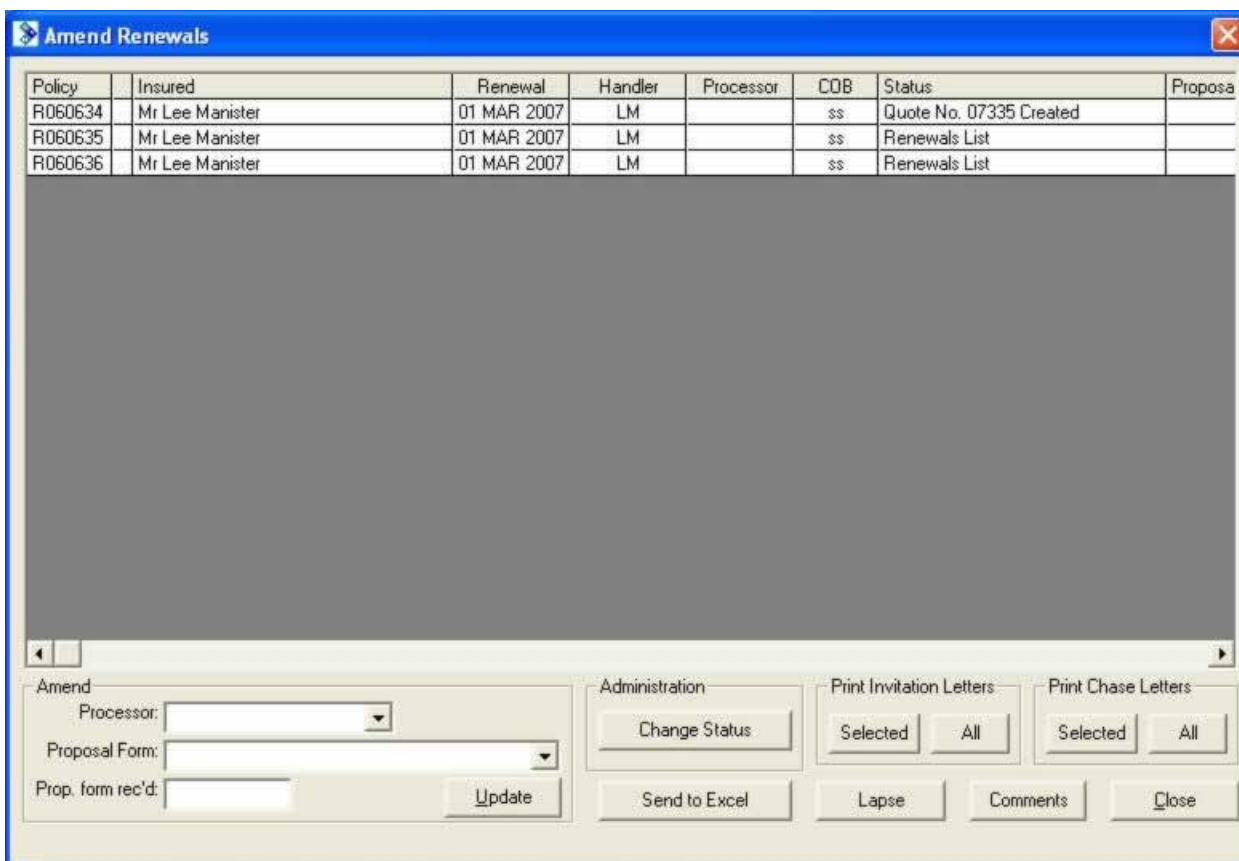
On selecting Display Renewals the following screen will be displayed:-



The above screen allows the technician to call back the original renewal list by the unique reference to view on screen and to update renewals as they progress through the renewal cycle.

If you wish to select a particular range or by a selective policy then use the appropriate boxes to enter the data. IBS will then only display the policies with the given criteria.

On selecting Search the following screen will be displayed to the technician.



The screenshot shows a software window titled "Amend Renewals". It contains a table with the following data:

Policy	Insured	Renewal	Handler	Processor	COB	Status	Proposa
R060634	Mr Lee Manister	01 MAR 2007	LM		ss	Quote No. 07335 Created	
R060635	Mr Lee Manister	01 MAR 2007	LM		ss	Renewals List	
R060636	Mr Lee Manister	01 MAR 2007	LM		ss	Renewals List	

Below the table is a large grey rectangular area. At the bottom of the window, there are several controls:

- Amend** section:
 - Processor: [dropdown menu]
 - Proposal Form: [dropdown menu]
 - Prop. form rec'd: [text field]
 - Update** button
- Administration** section:
 - Change Status** button
 - Send to Excel** button
- Print Invitation Letters** section:
 - Selected** button
 - All** button
- Print Chase Letters** section:
 - Selected** button
 - All** button
- Close** button

The above screen allows the policies on the renewal list to be allocated to a specific processor if required. By double clicking the relevant line of information and selecting the dropdown arrow and then the applicable processor. Should the renewal require a proposal form highlight the relevant renewal and complete the proposal form field, by selecting the proposal from the drop down menu. Once received the 'Prop. form rec'd' field can be updated with the received date. To accept any information entered in the above mentioned fields please ensure that you select Update when completed. This information will be added to your renewal list when next produced.

The first time you call this screen if you select the Change Status option you will note that all the fields will be blank. The system controls this screen during the various stages of the renewal process, however if a client has not received a particular invite or chase letter you can use the Change Status option to change the last letter sent. To do so select the renewal you want to amend by double clicking the line. This will put a X by the Policy number. Then click on the Change Status button. The following screen will be displayed.



Change Status

Details

Selection Reference: LEETESTRE

Invited Date: 25 JUL 2006

Chase Date: 25 JUL 2006

Proposal Received:

Quote Sent:

Firm Order Date:

Renewed: ☐

Renewal Premium:

Renewal Letter: A99

Update Close

As you can see the last Renewal Letter printed is shown in the bottom box. To change this click on the  button and change the status to the previous letter i.e. if you sequence was Letter A, Letter B, Letter C and Letter D and Letter C was the last letter produced but not received by the client you would need to set the Renewal Letter back to Letter B. Once you have completed your changes click on the Update button.

Print Invitation Letter

To use this functionality select an individual renewal from the displayed list or alternatively if you require all renewals to be selected, select the Print Invitation Letter and the option All. The system will create the first letter in the sequence of letters as the initial invitation letter. When you wish to produce the chaser letters select the Print Chase Letters and the system will look at the second letter in the sequence to produce the chaser. You can have any number of chaser letters in a sequence.

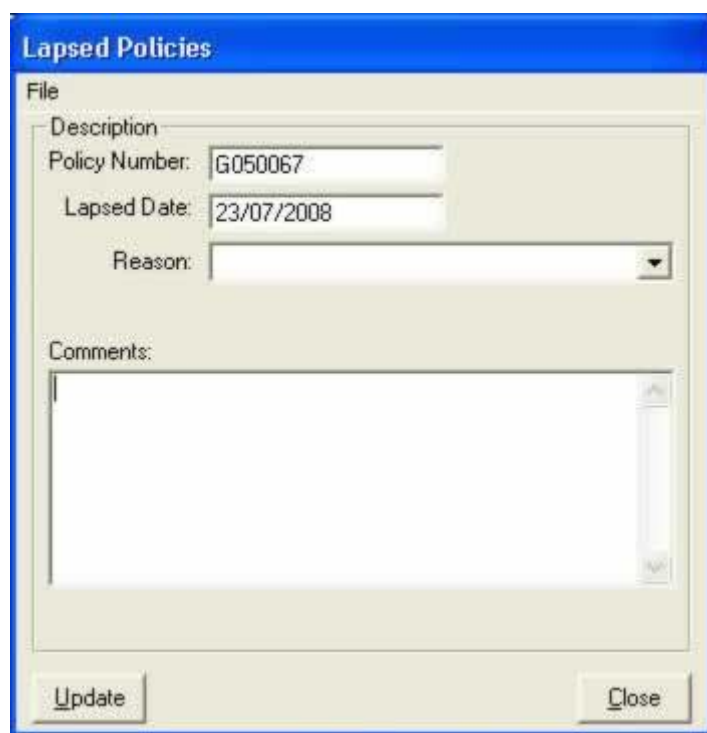
Renewing the Policy

Once you are ready to proceed with the renewal of the policy go to the menu option Risks and search for your policy using the various search criteria available. Select the option Create Renewals Quote which will convert the policy back to quote stage and mark the renewal list with the quote number created and also mark the renewing policy with the quote number. Once this quote is converted to a firm order IBS will generate the policy number with the last four or five digits of the previous years policy and moves the year of account on by one i.e.: G070001 becomes G080001 On completion of the renewal premium on the new years policy the system will delete the renewal from the renewals list.

Lapsing a policy

Lapsing a policy can be carried out from two different options on the menu. Select Renewals and Lapse Policy. Enter the policy number to be lapsed and complete the lapse policy details. The policy number and lapsed date will be completed automatically but the technician should select from the dropdown list the reason that the business was not renewed. Any comments to be noted should be entered in the comments field. Once the record is complete select Update and the system will prompt 'do you wish to produce a diary item' and also 'do you wish to produce a lapsed letter'.

A policy can also be lapsed in the Display Renewals Option. Enter the unique reference for the batch of renewals containing the policy you wish to lapse. Select the individual policy by highlighting the line and selecting the Lapse option which will display the same screen as the above lapse procedure.



Lapsed Policies

File

Description

Policy Number: G050067

Lapsed Date: 23/07/2008

Reason: [Dropdown Menu]

Comments:

[Large Text Area]

Update Close

Unlapse Policy

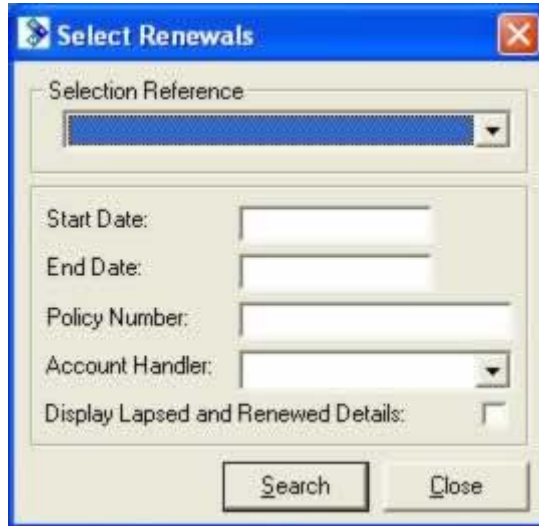
A policy can be unlapsed by selecting this option from the Renewals menu and entering the policy number to be unlapsed.

Print Last Batch of Renewals

This option finds the last batch of letters that were printed and reprints all items in the batch. To select which documents are reprinted, use the Reprint Renewals option described below.

Reprint Renewals

To select the policy or policies you wish to reprint documents for, enter the criteria into the window as shown and press Search.



The Print Renewals screen will open and you will be able to reprint the invite and chase letters as required.

Renewal Archive

This is a housekeeping function which should be performed periodically. This process removes policies from the renewals file once they have been renewed. This prevents old lists from appearing in dropdown boxes for selection.

Selecting this option will start a search through the system of all the renewals lists. You will see the progress bar moving at the bottom of the screen.

Once this has completed, the following screen will appear:



Select the renewal list you wish to archive from the dropdown list and press Archive. You will be prompted to confirm that you wish to continue. If applicable, you will also be prompted to archive policies which haven't been allocated to a renewals