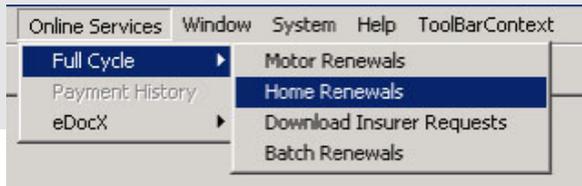


Applied Systems Home Full Cycle EDI Guide

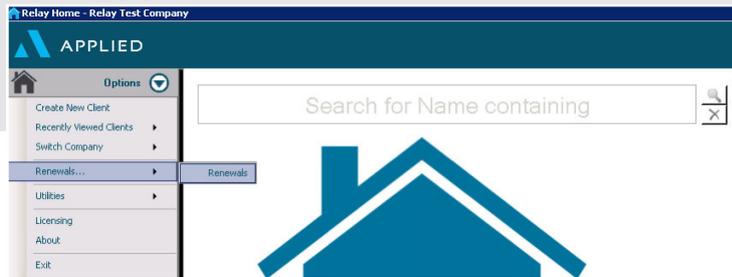
This document contains a step by step guide on how to renew your home full cycle EDI renewals.

1. Liberty Insurance is now offering FC Home Renewals on Applied Home.



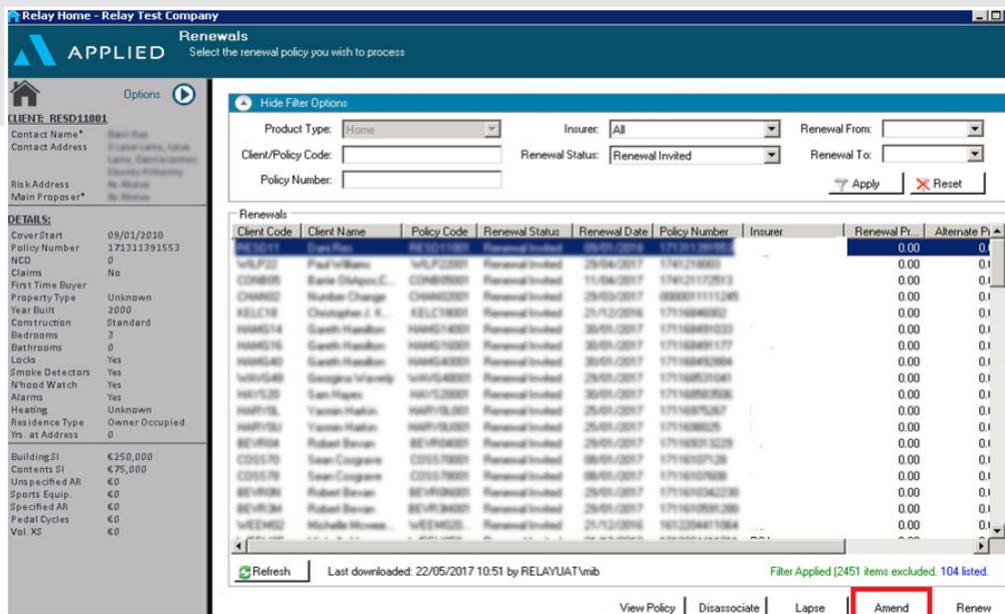
Applied Relay Customers

2. FC Home Renewals are available for Integrated and Stand Alone Home Systems.



Applied Home Stand Alone

3. Full renewals process capabilities i.e. offer, re-broke, confirm, transfer or lapse policies.



FC Home Screen

Click 'Amend' to proceed

Troubleshooting

Renewing or lapsing a policy must be done through online services otherwise the premium posting will duplicate if you have auto-posting turned on.

Matching Up/Association

When your renewals are invited by Liberty Insurance some of them will end up with a 'Not Matched' status. This is because either the client or the policy or both, are missing from your Applied Relay (AR) database.

1. To identify what is missing select the 'Not Matched' renewal and click the 'Associate' button.
2. Click on the green arrow on the right hand side of the screen and make sure the search criteria is on 'Name' so that you can search by name/surname.
3. Type in the name/surname to see if they are in the Applied Relay Database – you also need to check if the renewal policy is there also (use the renewal policy number to confirm it's the same).
4. If the client and policy is missing you can quickly create both using the 'Import' button, however you must ensure the status of the home policy is 'Active Non-FC' as part of this process. See the instruction at the bottom of this sheet.
5. If the client is there but the policy isn't, then just add in the policy details using the 'Other' button in the Client Portfolio screen in AR. When you use the 'Other' button you need to add in the policy number, select Liberty Insurance, leave status as Temporary, add in the cover start date and renewal date (2018) and press 'OK'.

Renewal Invite Stage

Once you have done the above go back into the Home FC Renewals Home Page...

1. Select the 'Not Matched' renewal and click the 'Associate' button again.
2. Type in the full name and select the correct client/policy record (it should be there now).
3. Press 'OK'.
4. Now press the 'Refresh' button so that the status of the policy updates (this step is NB).
5. The status of the policy will now change to 'Renewal Invited'.

Renewal Offer Stage

You can now offer the renewal by selecting the 'Amend' button and clicking "Next" till you get to the Quote Results screen – you know the process from here – select 'Offer Renewal' and print your documents.

After you offer the renewal the status will auto change to 'Renewal Offered'.

Renew/Lapse

When the customer confirms what they are doing select the Renew or Lapse Button.

If Renew, click the 'Renew' button and 'Submit' on the next page to complete the process.

If Lapse, the system will ask you for a reason and then you can confirm the policy is lapsing.

How to change the status of a Home Policy to Active Non-FC

1. Look up the Client in Applied Relay.
2. Select the Home Policy and right click and select Risk Details.
3. Open the Risk Details of the policy and ensure the status is Temporary.
4. Select *Options - Update Policy Details*.
5. Mark it as Accepted with the Cover Start Details for the current live policy (Cover Start Date will be 2017).
6. Press OK.
7. Policy status should update to Active Non-FC.