



## AGENT PORTAL UPCOMING RENEWALS PRINT RENEWAL NOTICES/INVOICE

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COMMERCIAL LINES RATERS AND APPLICATION SUBMISSION

POLICY LOOKUP: PERSONAL AND COMMERCIAL

AGENT SERVICE PORTAL

Click the Upcoming Renewal Tab

Raters Link Policy Statement Request Endorsement Submit FNOL/Claim **Upcoming Renewal** Report

Test Producer | Log Out  
Core Agency (AGT1958)

Mobile Home and ARIC GL Rater

The screen will load with the applicable settings in place.

**Never uncheck the "Show Pending Renewals" check box.**

The agent can put the upcoming renewals in order by effective date by clicking the Eff Date column header. Now the Upcoming Renewals will be in date order, the most recent to the oldest within the next 58 days.

Raters Link Policy Request Endorsement Submit FNOL/Claim **Upcoming Renewal** Statement Report E-Certificates Agent settings

Test Producer | Log Out  
Core Agency (AGT1958)

Quick Search Advance Search

3 Months **6 Months** 9 Months 1 Year

Show Pending Renewals Only

★ Renewal in next 15 days

Show entries: 10 Search:

Policy #	Insured	Coverage	Eff Date	Exp Date	Phone #	Policy Status	Expiring policy premium
<input type="text"/>							

The Policy # column is the *MOST RECENT term* Policy number.  
The Renewal term premium is shown and includes fees/taxes.

3 Months **6 Months** 9 Months 1 Year

Show Pending Renewals Only

★ Renewal in next 15 days

Show entries: 10 Search:

Policy #	Insured	Coverage	Eff Date	Exp Date	Phone #	Policy Status	Policy Premium	Document Upload
<input type="text"/>	<input type="text"/>	<input type="text"/>						
MHG12345	John Smith	MOBILE HOME	10/21/2023	10/21/2024	(856) 938-9952	Renewal Quote Offered	1,771.25	
MHG678910	Jane Doe	MOBILE HOME	10/22/2023	10/22/2024	(315)283-3833	Renewal Quote Offered	3,120.50	

If the agency wants to search for a specific insured or policy – use this grid SEARCH toolbar.

Show entries: 10 Search:

Policy #	Insured	Coverage	Eff Date	Exp Date	Phone #	Policy Status	Expiring policy premium
<input type="text"/>							

## To Download and Print Renewal Notice/Invoice:

From the upcoming renewal tab, click the insured policy number.

3 Months  6 Months 9 Months 1 Year

Now Pending Renewals Only

Renewal in next 15 days

How entries: 10 Search:

Policy #	Insured	Coverage	Eff Date	Exp Date	Phone #	Policy Status	Policy Premium	Document Upload
MHG12345	John Smith	MOBILE HOME	10/21/2023	10/21/2024	(856) 938-9952	Renewal Quote Offered	1,771.25	
MHG678910	Jane Doe	MOBILE HOME	10/22/2023	10/22/2024	(315)283-3833	Renewal Quote Offered	3,120.50	

The screen will refresh and automatically scroll to the bottom of the screen.  
Click the Documents tab.

Renewal Details( Policy : )

Renewal History Documents

Policy #	Insured	Requested Date	Description
No data available			

Showing 0 to 0 of 0 entries

First Previous Next Last

If a renewal Notice/Invoice is available, it will be listed here. Click the Download Feature.

Renewal History Documents

Document Name	
RENEWAL QUOTE.pdf	Download

Invoice will open for printing/saving to email.  
If the document doesn't open, please check your pop up blocker settings.

**HELPFUL TIPS:**

- Since this tab is called "UPCOMING Renewals" it will only show the *renewals coming up*.
- Once the renewal date passes, the renewal information falls off of this screen.
- Also, if the policy is renewed, the renewal information falls off of this screen.

### POLICY LOOKUP – QUICK REFERENCE:

For the agent to determine if a policy has been renewed or if the policy expired out, do a policy search on the Policy tab to see if it renewed. **Please Note:** *Currently there is a slight delay with renewal policy issuance. If in doubt, please call our office for assistance.*

Go to the Policy Tab.

Under EITHER search tab (Quick Search or Advance Search) you can search for the insured either by name or policy number. Below we will use Advance Search.

Quick Search | Advance Search

From Date:  To Date:

Policy Number:  Insured Name:

Search Clear

Show entries: 10  Search:

Policy #	Insured	Coverage	Policy Status	Carrier	Agent Name	Endorsement Request	E-Certificate
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To view policy effective dates, click the plus sign next to the policy number. This particular example shows three policy terms. I'm going to select the third one since it ends in -02 and that tells me it is the most recent term we have.

Policy #	Insured	Coverage	Policy Status	Carrier	Agent Name	Endorsement Request	E-Certificate
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>				
<input type="text"/>	JESSE DOE	MOBILE HOME	Policy Expired	Great Lakes Insurance SE		Endorsement Request	
<input type="text"/>	JESSE DOE	MOBILE HOME	Policy In Force	Great Lakes Insurance SE		Endorsement Request	
<input type="text"/>	JESSE DOE	MOBILE HOME	Policy In Force	Great Lakes Insurance SE		Endorsement Request	

Now, you can see the effective dates and assigned underwriter for that term.

At this point you can determine which term is the current term and if it renewed or expired out. If you are not sure then contact our office for assistance.

**Questions?** Please call our office at (352) 638-9400.