

Updated 03/20/2020 by Judy Madden

Updated 11/08/2020 by Judy Madden

Address Change:

Pull up task Induction copy policy number – go to maintain docs do check if this is a duplicate.

JW SME	Address Change	Help Law Offices	LP012683	AUWSETUP
JW SME	Address Change	Kimberly M. Lord, Counsellor At Law	LP010280	AUWSETUP
JW SME	Address Change	Help Law Offices	LP012683	AUWSETUP

Copy policy number – go to maintain docs do check if this is a duplicate.

Induction:

Maintain Docs:

Document ID	3028831552
Pool Name	AUW SME
Batch ID	2020-11-08T151
Batch Class	Lawyers_email
Document Type*	Customer Request

Current PU: AttPro

Document ID*
Batch ID*
Policy #*

LP010280 x Retrieve Data

Search

LP010280 x

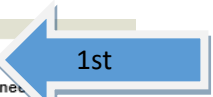
*** If a duplicate copy the doc ID number (from maintain docs) – go to induction – click on Put In File (PIF) click on comment – add note See doc ID ____ - this is a duplicate Will PIF – then click on add comment – click on complete

Maintain Document

Processing Unit AttPro
Document ID 3028831552 Select One

Induction

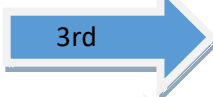
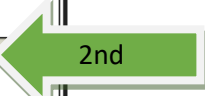
Large Group (> 10 Attorneys)
RD, COUNSELLOR AT LAW
Put In File (PIF) Please check if document ne
UW Action Needed Please check if UW Actions ne
CF Action Needed Please check if CF Actions needed



http://imaging.medpro.com/?mode=view - View Comments - Internet Explorer

View Comments
Document ID: 3028831552
Comments Entered
Add your comments below
This is a duplicate - see doc ID 3028831552
Will PIFA

Withdraw Decline LostOppty
Add Comment



Add Comments Cancel Close

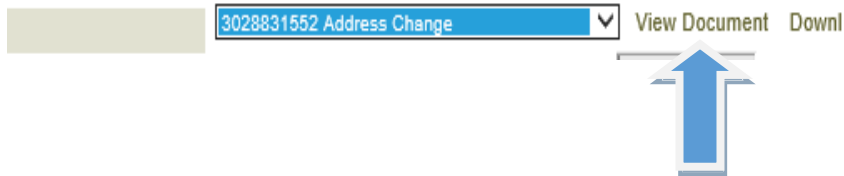
5th

Update Complete Release Close Question

Attach Document Merge Documents Back to Indexing Lookup

IF not a duplicate– open view document to read the email to verify the effective date is provided – if not you will need to email the agent before completing the task.

AUW Setup (AttPro)



Hi Judy,

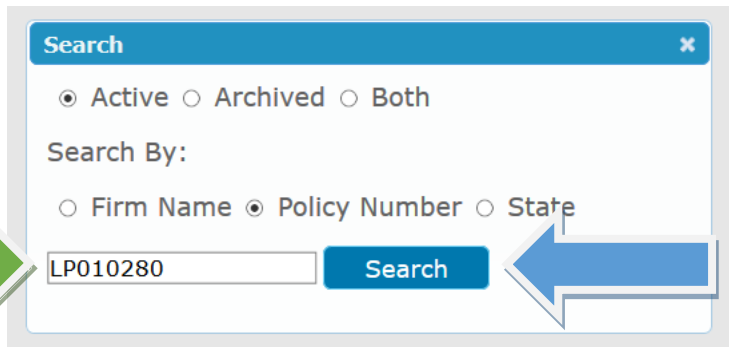
The insured has advised the effective date of the address change is 1/17/2020.

Hi Judy,

The insured has advised the effective date of the address change is 1/17/2020.

(If the effective date is at renewal go to page 13)

Paste policy number in data base and hit search



Database – Update the address (you may have to update more than one file-depending on the effective date of the change) – For example if the address change is 01/17/2020 and database shows 2 policy periods 12/10/2019 -12/10/2020 and 12/10/2020 – 12/10/2021 you will update both files. Click edit for the policy period the address change was made 1st then update all other files.

12/10/2019	12/10/2020	Show	Edit
12/10/2020	12/10/2021	Show	Edit

Business Information:

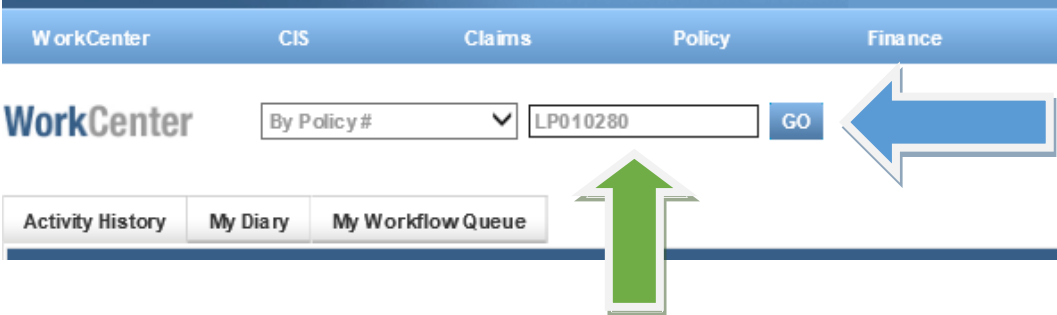
Firm Name: **Kimberly M. Lord, Counsellor** Suite:

Street Address: **10521 Edgewater Dr.** City: **Cleveland**

State: **OH** Zip Code: **44102**

County: **Cuyahoga** Business Fax: **(216) 631-5364**

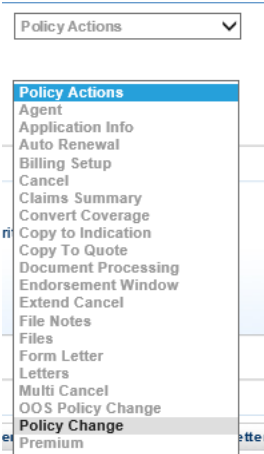
Go to Oasis and enter the policy number and click on go



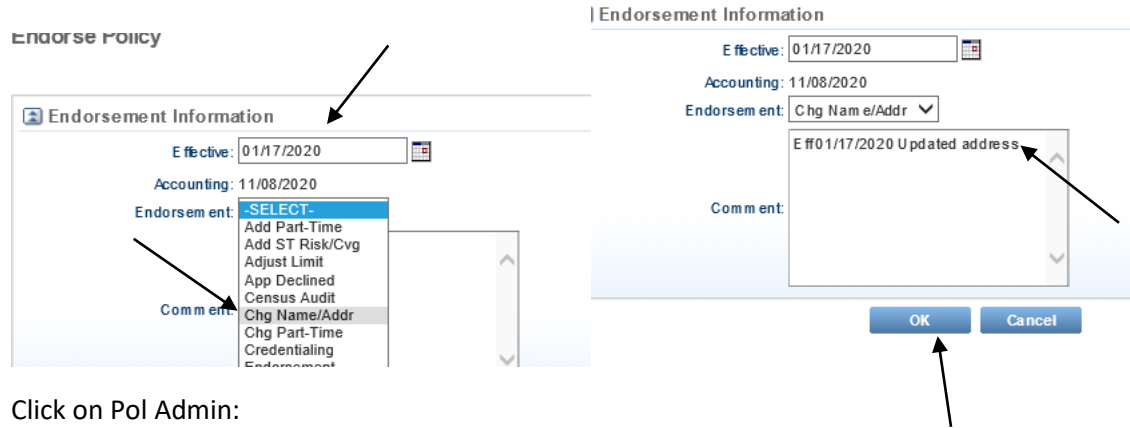
Click on the policy period you will be updating - If you are ONLY updating the current policy (if updating multiple polices go to page 12)

<input type="checkbox"/>	Policy No	Type	Term Effective	Term Expiration
<input checked="" type="checkbox"/>	LP010280	POLICY	12/10/2019	12/10/2020
<input type="checkbox"/>	LP010280	POLICY	12/10/2018	12/10/2019

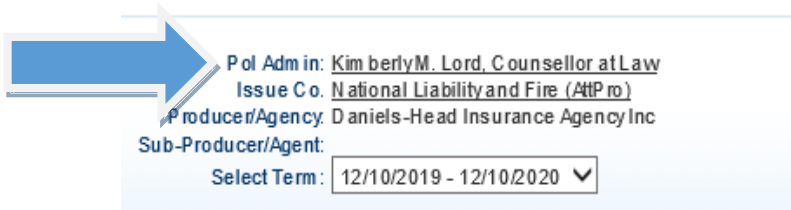
Go to Policy Actions click on the arrow – click on Policy Change



Enter effective date – click on the arrow and click on Chg Name/Addr – add note Eff _____ Updated Address, Click OK

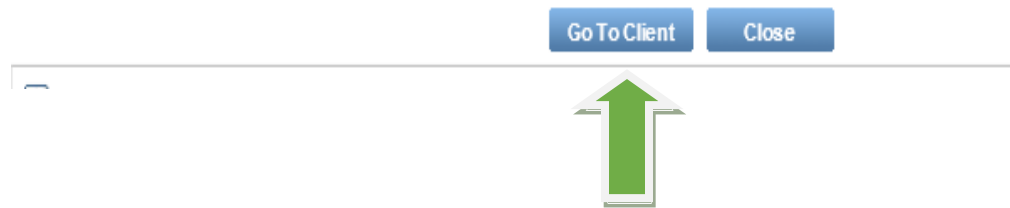


Click on Pol Admin:

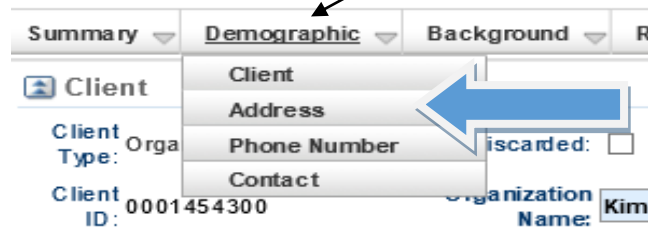


Click on Go To Client

Entity Mini Popup



A 2nd pop-up will appear – click on Demographic and address



Click on the word Change



Click on Change to view or change address.

Change	Primary	P.O. Box	Type	U.S.	Address
Change	Yes	No	Office	Yes	1160 Rockefeller Building, 614 West Superior Avenue, Cleveland, OH

Update the address and Update the Eff From to the effective date of the address change (if the county changed from previous address you will need to update database) – Click save

Country: USAAddress Address Type: Office Primary: Yes

Attn. of:

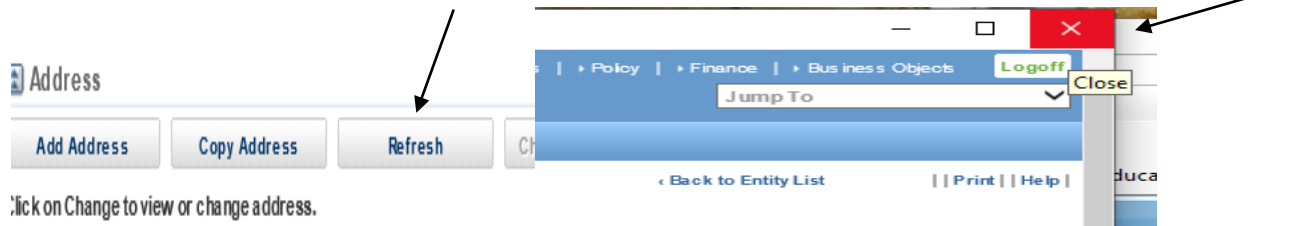
Line 1: 10521 Edgewater Dr. City: Cleveland State: OH

Line 2: ZIP: 44102 County: Cuyahoga

Line 3: Zip Plus Four:

Eff. From: 01/17/2020

Hit Refresh and click the X (top Right of screen)



Click Close and Click Save WIP

Entity Mini Popup

Go To Client Close

Header

Pol Adm in: Kimberly M. Lord, Counsellor at Law
Issue Co. National Liability and Fire (AtP ro)
Producer/Agency: Daniels-Head Insurance Agency Inc
Sub-Producer/Agent:
Select Term: 12/10/2019 - 12/10/2020

Rate Save WIP Save Options

Click on Pol Admin to confirm the address was updated – click close

Pol Adm in: Kimberly M. Lord, Counsellor at Law
Issue Co. National Liability and Fire (AtP ro)
Producer/Agency: Daniels-Head Insurance Agency Inc
Sub-Producer/Agent:
Select Term: 12/10/2019 - 12/10/2020

Entity Mini Popup

Go To Client Close

Header

Full Name: Kimberly M. Lord, Counsellor at Law DOB/DOI:
Vendor ID: 1099 Type:
License #: License State:

Addresses

2 records

Primary	Type	U.S.	Address
Yes	Office	Yes	10521 Edgewater Dr., Cleveland, OH 44102-6127
No	Office	Yes	1160 Rockefeller Building, 614 West Superior Avenue, Cleveland, OH 44113-1334

Add the last 4 digits of the zip code in Database

Oasis

Change Yes No Office Yes 10521 Edgewater Dr., Cleveland, OH 44102-6127

Expired No No Office Yes 1160 Rockefeller Building, 614 West Superior Avenue, Cleveland, OH 44113-1334

Database

Without the 4 digits

Form fields showing address information without the 4-digit zip code extension:

- City: Cleveland
- Zip: 44102
- Phone: (216) 631-5364
- State: 1

With the 4 digits

Form fields showing address information with the 4-digit zip code extension:

- City: Cleveland
- Zip: 44102-6127
- Phone: (216) 631-5364

If an insured moved to a NEW STATE please add a note on the address task (and if there is a renewal task also add a note) Note needs to read: Insured moved from (name of state) to (name of state) – will need to create a new policy in Oasis at renewal. Please provide the old and new policy number to Judy
*** we need to tie the old policy number with the new policy number.

Go to induction – click on add comment – Add your note – click on Add Comments – click close

The screenshot shows the address update process with four numbered callouts:

- 1st:** Points to the 'Add Comment' button in the top right corner of the address task window.
- 2nd:** Points to the text input area where the address change note is entered.
- 3rd:** Points to the 'Add Comments' button at the bottom of the address task window.
- 4th:** Points to the 'Close' button at the bottom of the address task window.

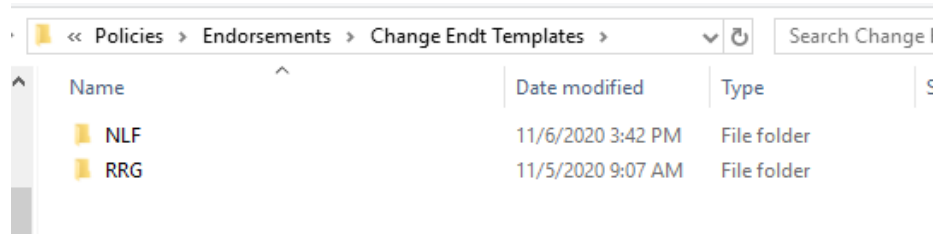
Verify the Policy Effective date - should be the policy term you are updating

Verify the Adjustment Effective Date – should be the effective date of the address change.

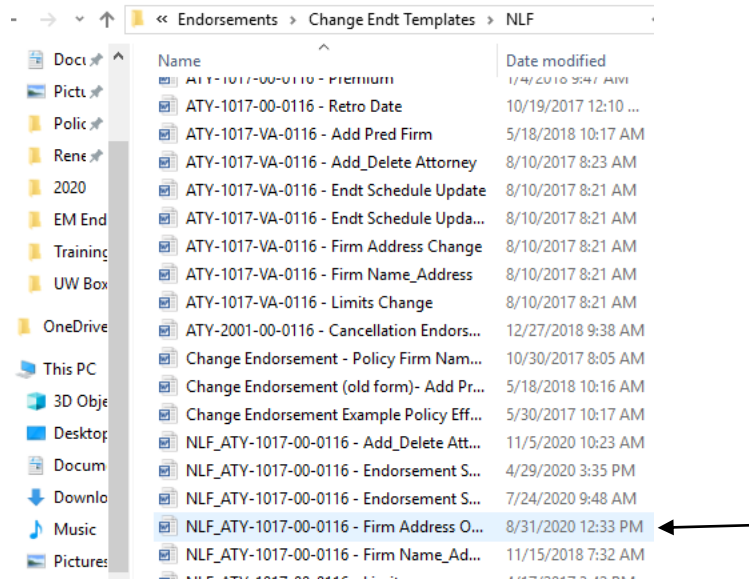
The screenshot shows two date fields:

- Policy Effective Date:** 12/10/2019
- Adjustment Effective Date:** 01/17/2020

Go to the Policies folder to type up the endorsement – **Lawyers Professional Liability Insurance/Policies** – **click on the folder Endorsements** – Click on the Change Endt Templates – Click on NLF (LP policies) or RRG (RLP policies) (FL, HI, NY, NM, NJ, WA & LA)



Click on the endorsement for the Firm Address Only



Click view - update the endorsement (everything in gray) – save in the current year you are doing the endorsement (you may be doing multiple endorsements depending on the effective date of the address change)

CHANGE ENDORSEMENT

Forming Part of Policy No.: LP010280

First Named Insured: Kimberly M. Lord, Counsellor at Law

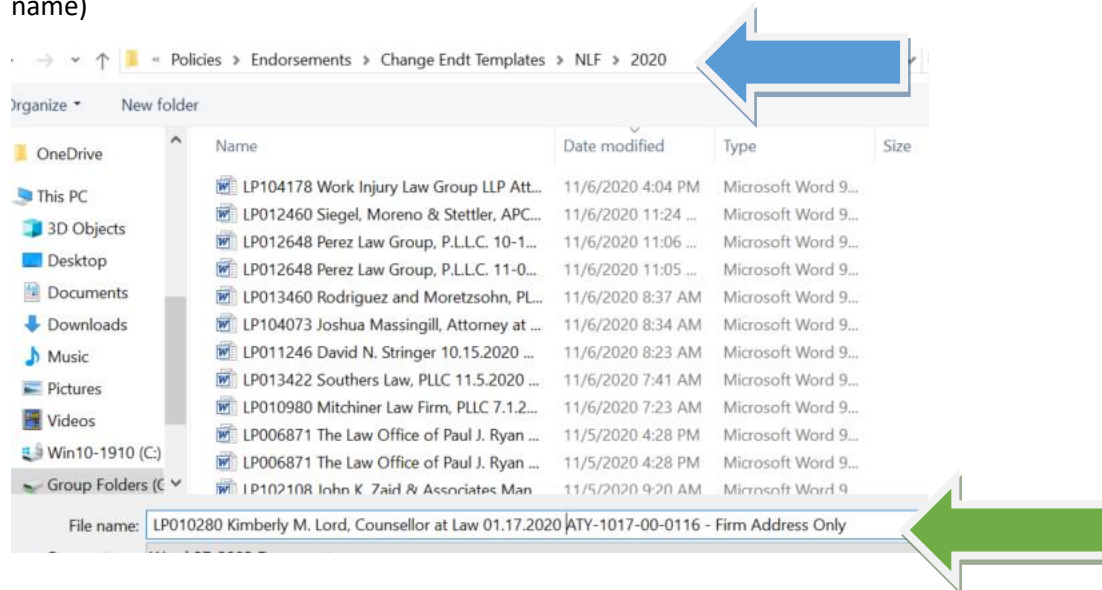
Effective Date of Endorsement: 01/17/2020 at 12:01 a.m. Standard Time at the address of the First Named Insured.

In consideration of the payment of the additional premium due, if any, and in reliance upon the representations of all **Insureds, we** and **you** agree to amend the policy as follows:

It is agreed and understood that the **Named Insured's** address in the Declarations has been amended to reflect the following:

ITEM 1	NAMED INSURED: ADDRESS:	Kimberly M. Lord, Counsellor at Law 10521 Edgewater Dr. Cleveland, OH 44102-6127
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Save as policy number, Name of firm, effective date of the change (keep the endorsement number and name)



Make sure you update all files in Database (renewal file if already set up in database)

Go to maintain docs – click on the RN file (past or current)

Add comment:

See doc ID _____ - updated address

Copy your notes in induction – click ad comment – click close

Go to induction - Click Question – forward to Audit SME – peer review – Comment section: Endorsement ready in NLF or RRG folder

The screenshot shows a web application interface with a main form titled "Question Reasons" and a sidebar on the right. The main form contains the following elements:

- Question To:** A dropdown menu with "AUDIT SME" selected.
- Name:** A dropdown menu with "Select One" selected.
- Reasons:** A dropdown menu with options: "Broker Change", "Effective Date/Policy Period Discrepancy", "Need to Attach Document", "Other" (highlighted), and "Peer Review".
- Comments:** A text area containing the text "Endorsement ready in NLF or RRG Folder".
- Buttons:** "Go" and "Cancel" buttons at the bottom of the form.

The sidebar on the right, titled "Work Center 2019.1.0-M-...", contains the following fields:

- Adjustment Effective Date: 01/17/2020
- Followup Date: [Empty]
- Need by Date: [Empty]
- Urgency Flag: Please ch
- Source: Select One
- Large Group (> 10 Attorneys):
- Put In File (PIF): Please che
- UW Action Needed: Please ch
- CF Action Needed: Please ch
- Account Type: [Empty]
- Risk Retention Group:

At the bottom of the sidebar are buttons for "SME Information", "SME Mass Update", and "Withdraw".

Navigation arrows are overlaid on the image:

- 1st:** Points to the "Question" button at the bottom of the page.
- 2nd:** Points to the "Question To" dropdown.
- 3rd:** Points to the reasons dropdown menu.
- 4th:** Points to the "Comments" text area.
- 5th:** Points to the "Go" button.

***If updating multiply policies you will go to the 1st policy period that the address will be changed. For example if the address change was 05/08/2019 you will open the 12/10/2018 – 12/10/2019 policy

Policy Count:2

	Policy No	Type	Term Effective	Term Expiration
<input type="checkbox"/>	LP010280	POLICY	12/10/2019	12/10/2020
<input checked="" type="checkbox"/>	LP010280	POLICY	12/10/2018	12/10/2019

Go to Policy Actions click on the arrow – click on OOS Policy Change (this will update the current policy and all other policies in effect after the effective date of the address change)

Policy Actions P.

Policy Actions Policy2

- Agent
- Application Info
- Billing Setup
- Cancel
- Claims Summary
- Document Processing
- Endorsement Window
- File Notes
- Files
- Form Letter
- Letters
- Multi Cancel
- OOS Policy Change**
- Premium
- Reinstate
- Transaction
- View Non Premium
- IBNR Inactive Window

Wri

Payment Endorsements Letters

Go back to page 5

If the address change is at RENEWAL only

1. If we receive an address change that is effected at renewal you will need to index the task.
2. When the task is assigned to an AU you will need to update database – ONLY the renewal file

LP010280	Kimberly M. Lord, Counsellor at Law		10521 Edgewater Dr.	Cleveland	OH	44102-6127	12/10/2019	12/10/2020
LP010280	Kimberly M. Lord, Counsellor at Law		10521 Edgewater Dr.	Cleveland	OH	44102-5364	12/10/2020	12/10/2021



Business Information:

Firm Name: **Kimberly M. Lord, Counsellor** Suite:

Street Address: **10521 Edgewater Dr.** City: **Cleveland**

State: **OH** Zip Code: **44102-5364**

County: **Cuyahoga** Business Fax: **(216) 631-5364**

3. Verify the Policy Effective date - should be the policy term you are updating
Verify the Adjustment Effective Date – should be the same as the effective date.

Policy Effective Date

Adjustment Effective Date

Followup Date

4. Add your note into Induction – Click Add comment – Add your note – Click on Add Comments – Click Close

Add your comments below

Eff at renewal (12/10/2020) updated address to:
10521 Edgewater Dr.
Cleveland, OH 44102-5364
No change in county
Endorsement is not needed

Class Update Withdraw Decline LostOppt

Eff at renewal updated address to:
No change in county
Endorsement is not needed

**** If there is a change to the county you will need to rerate the policy

****If the premium changed and we did **NOT** receive a RTB you will need to send an updated auto renewal quote or renewal quote to the agent and let them know due to the county change the premium changed. Attached the renewal quote to the Renewal file in Induction and add a note – See doc ID _____ address change at renewal. County change to: _____ Sent a revised auto renewal / or quote

****If the premium changed and we **DID** received a RTB – send an email the underwriter to see if they want to honor the previous renewal quote or to send a revised quote.

5. If this is an **Agency bill** you will PIF the task (remember no endorsement is needed)

Go to maintain docs – click on the RN file

Add comment:

See doc ID _____ - updated address

Copy your notes in induction – click ad comment – click close

Question to the Audit pool – Peer Review – click Go