



FSC Manager

» Forms

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Introduction

This chapter covers how to create and view non-application ACORD forms such as changes, binders, claims, certificates, evidences and cancellation requests. These forms are integrated with the policies. Users are able to insert scanned signatures into these forms so they can be emailed immediately out of the system.

Forms

How to Create a Form

Forms can be created from the Client screen as well as from the Policy screen. Once the form has been created, fill it out and close to save. Information specific to each form will be discussed later in the document.

Client Screen

1. Highlight a policy that will integrate information into the form.
2. Click on the *New Form* button. A list of forms that are appropriate for the policy type highlighted will appear.
3. Highlight the appropriate form from the list and click on *OK*.

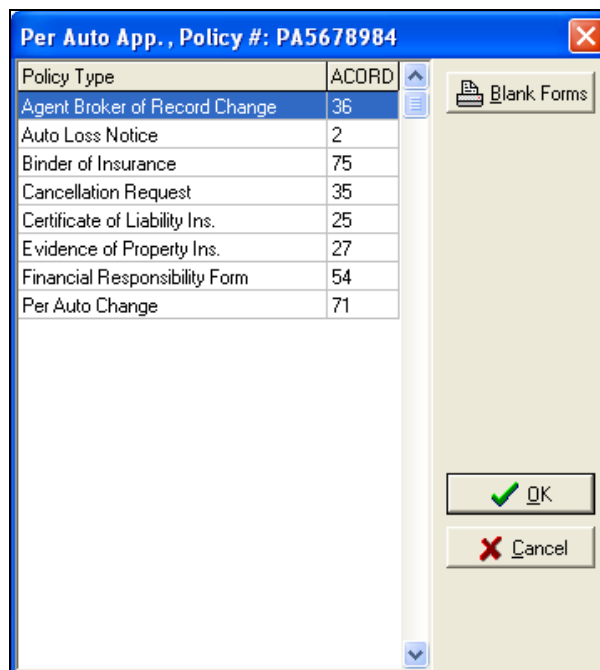


Figure 1: Forms List

Policy Screen

1. In the Policy screen, click the button on the toolbar which represents the form that should be created.

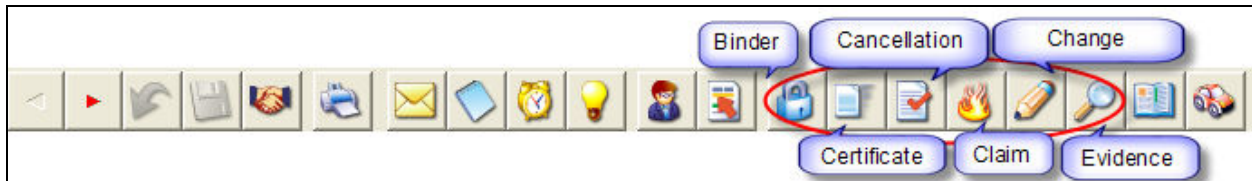


Figure 2: Policy Screen Toolbar

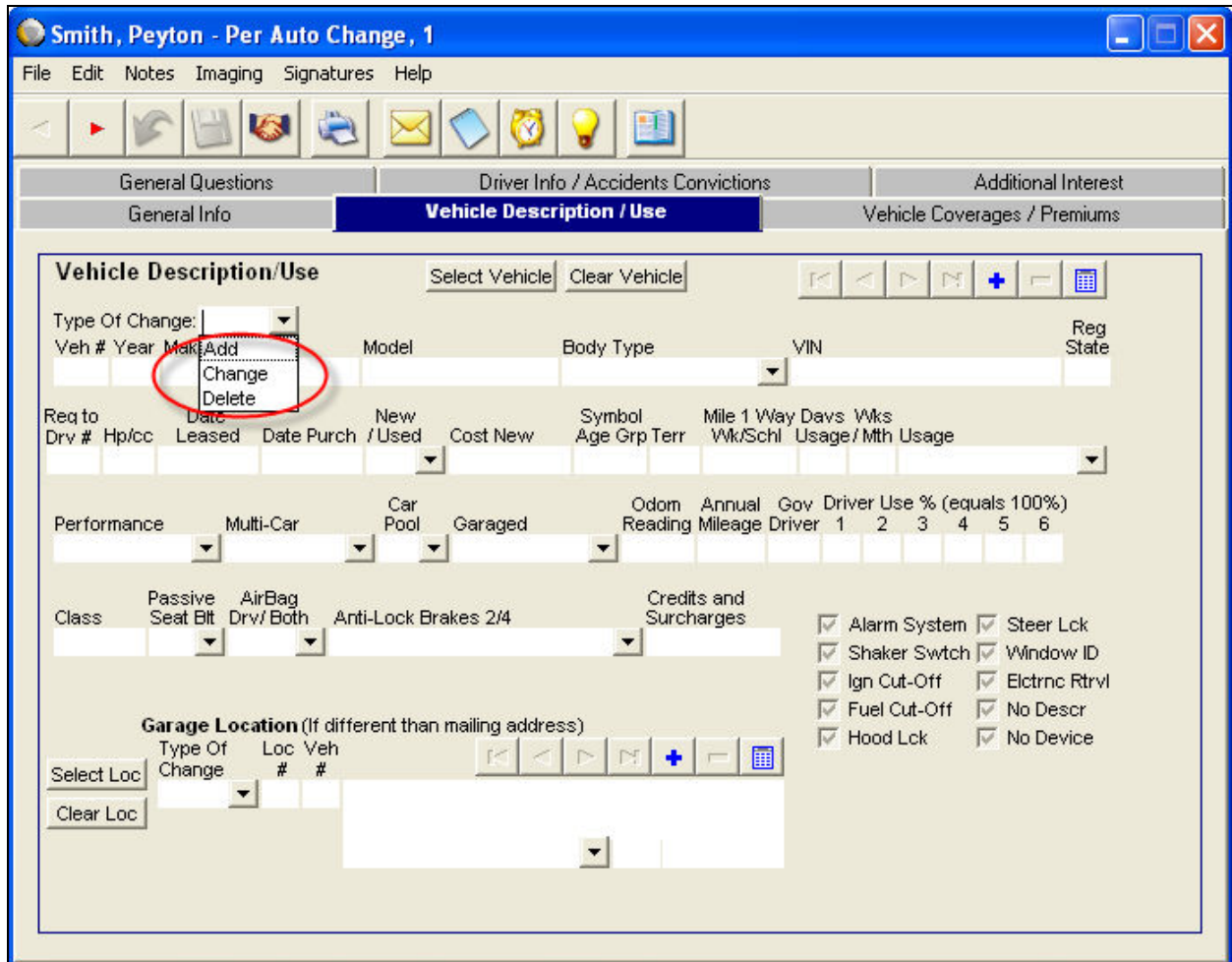
Policy Change Form

- » There are three change requests in the system: *Personal Auto Change Request*, *Personal Policy Change Request (Except Auto)* and *Commercial Policy Change Request*. The system will automatically open the form that is appropriate for the policy highlighted.
- » On the *Personal Policy Change Request (Except Auto)* and the *Commercial Policy Change request*, make sure the *Policy Type* field is properly check marked. If a policy type is not check marked, the policy cannot be updated when the form is closed.
- » The *Type of Change* field must have a value of *Add*, *Change* or *Delete*. Select *Add* and *Delete* to add or remove a vehicle, drivers or additional interests, etc. from the policy. Use *Change* to alter information on a current vehicle, driver, additional interest, etc.

WI Commercial Policy Change Request			Date 09/13/2006	Tag
Agency My Insurance Agency 123 Main Street P.O. Box 26 Jim Falls WI 54748 715-985-2300 715-287-4499 jenniferthompson@mi-assistant.com			Policy Type <input type="checkbox"/> Property <input checked="" type="checkbox"/> Auto <input type="checkbox"/> Workers Comp <input type="checkbox"/> Inland Marine <input type="checkbox"/> Truckers <input type="checkbox"/> Motor Carriers <input type="checkbox"/> Umbrella <input type="checkbox"/> Business Owners <input type="checkbox"/> General Liab.	
Code	SubCode	Agency Cust ID	Company NAIC Code	
		1000283	Acuity	
Insured's Name And Mailing Address ABC Siding			Attention:	Policy #
<input type="button" value="Load Client Info"/> Mailing Address Changed To:				123456
			Eff Date Of Change Pol Inception Date	Pol Exp Date
			12/06/2006	12/06/2007
This is an acknowledgement of your request. Upon approval, the company's records will be adjusted accordingly, and if a premium adjustment is required, it will be done at premium audit or by endorsement.				

Figure 3: Change Request/Policy Type

- » When deleting or changing information on the form, look for buttons that allow the user to select information from the policy (i.e. *Select Vehicle*, *Select Coverages*, *Select Driver*, *Select from Policy*) instead of having to enter it manually.



The screenshot shows a software window titled "Smith, Peyton - Per Auto Change, 1". The interface includes a menu bar (File, Edit, Notes, Imaging, Signatures, Help) and a toolbar with various icons. The main content area is divided into tabs: "General Questions", "Driver Info / Accidents Convictions", "Additional Interest", "General Info", "Vehicle Description / Use" (selected), and "Vehicle Coverages / Premiums".

The "Vehicle Description / Use" tab contains several sections:

- Vehicle Description/Use:** Includes buttons for "Select Vehicle" and "Clear Vehicle", and a "Type Of Change" dropdown menu. The dropdown menu is open, showing options: "Add", "Change" (circled in red), and "Delete".
- Form Fields:** Includes fields for "Veh #", "Year", "Make", "Model", "Body Type", "VIN", "Reg State", "Req to Drv #", "Hp/cc", "Leased", "Date", "Date Purch", "New / Used", "Cost New", "Symbol Age Grp Terr", "Mile 1 Wk/Schl", "Way Dvcs", "Days Wks", "Usage / Mth Usage".
- Performance:** Includes dropdowns for "Performance", "Multi-Car", "Car Pool", "Garaged", and "Odom Reading".
- Class:** Includes dropdowns for "Class", "Passive Seat Blt", "AirBag Drv/ Both", "Anti-Lock Brakes 2/4", and "Credits and Surcharges".
- Garage Location:** Includes a "Garage Location (If different than mailing address)" section with "Type Of Change", "Loc #", and "Veh #" fields, and buttons for "Select Loc" and "Clear Loc".
- Checkboxes:** A list of checkboxes for "Alarm System", "Steer Lck", "Shaker Swtch", "Window ID", "Ign Cut-Off", "Elctrnc Rtrvl", "Fuel Cut-Off", "No Descr", "Hood Lck", and "No Device".

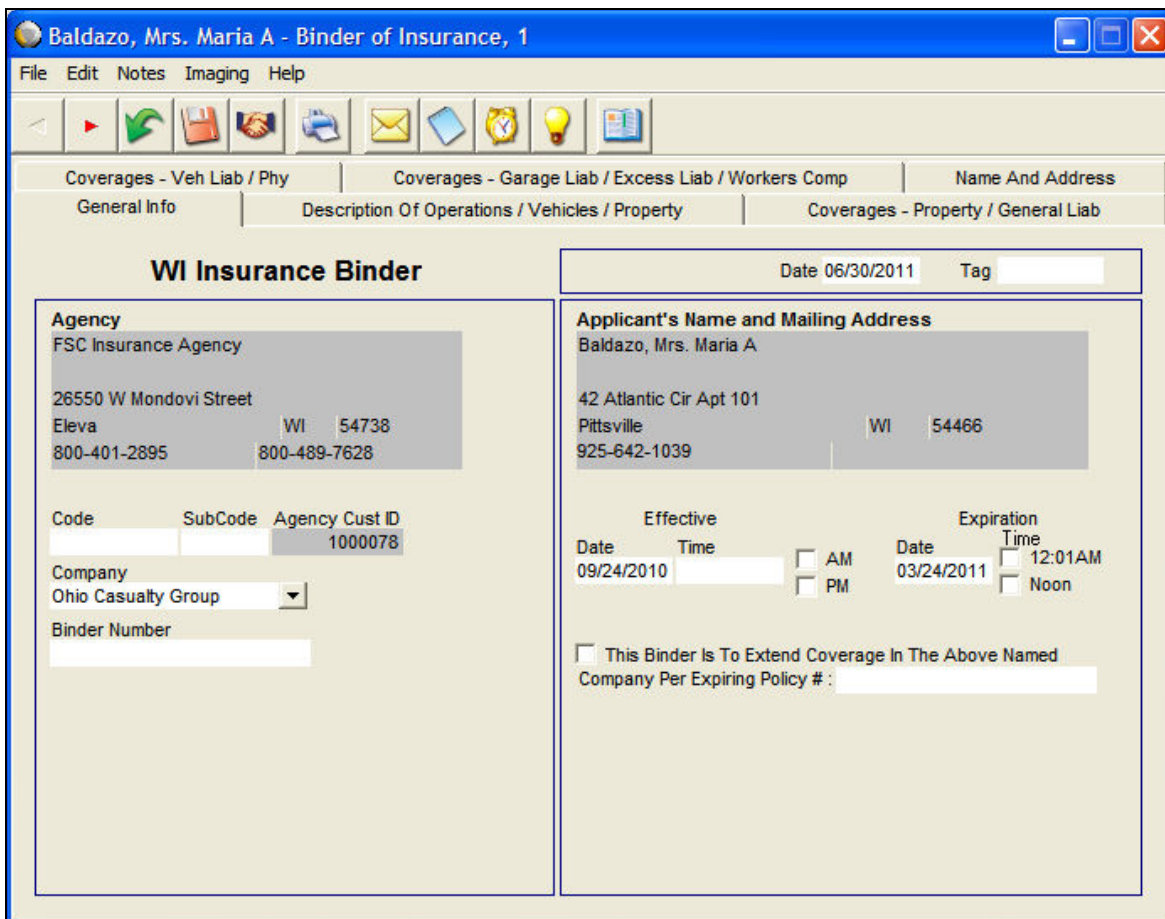
Figure 4: Auto Policy Change

- » On a *Personal Auto Change Request*, after a new vehicle has been added, the user can select the same coverages as another vehicle on the policy. This is done by going to the *Vehicle Coverages/Premiums* tab and clicking the *Select Coverages* button, then selecting the vehicle whose coverages are to be copied. After selecting the existing coverages, the user can still make adjustments specific to this vehicle.
- » Hitting the *No* button on the *General Questions* tab will automatically check mark all no on all questions.

- » When the form is completed, close the form and a message will pop up: *Do you want to PUSH the changes to the (Policy Type) Application?* Note: *This can be done only once for each form created.* Clicking yes will immediately transfer the changes made on the change form back to the policy. Do
- » not do this until all changes have been entered on the form. Some agencies choose to wait and allow a download to update the policy information.

Binder

- » A Binder will automatically pull in the company and the effective and expiration dates of the policy.
- » Go to each tab and use the *Select Policy* button to pull forward other vital information from the policy onto the binder.
- » On the *Name and Address* tab, enter the individual/entity that the binder will be sent to. This can be done by using the *Select from Policy* button or the *Select from Addr. Book* button. The user can also manually type a name and address and then click the *Add to Addr Book* button if it would be used on other binders.



Baldazo, Mrs. Maria A - Binder of Insurance, 1

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Coverages - Veh Liab / Phy Coverages - Garage Liab / Excess Liab / Workers Comp Name And Address

General Info Description Of Operations / Vehicles / Property Coverages - Property / General Liab

WI Insurance Binder Date 06/30/2011 Tag

Agency FSC Insurance Agency 26550 W Mondovi Street Eleva WI 54738 800-401-2895 800-489-7628			Applicant's Name and Mailing Address Baldazo, Mrs. Maria A 42 Atlantic Cir Apt 101 Pittsville WI 54466 925-642-1039			
Code	SubCode	Agency Cust ID	Effective Date	Effective Time	Expiration Date	Expiration Time
		1000078	09/24/2010		03/24/2011	12:01AM
Company Ohio Casualty Group			<input type="checkbox"/> This Binder Is To Extend Coverage In The Above Named Company Per Expiring Policy # :			
Binder Number						

Figure 5: Binder

Cancellation Request

- » The *Company, Policy Number, Effective* and *Expiration* dates will automatically populate into this form.
- » This form can only be completed for policies that exist in the agency's system. To cancel a policy that a customer has with another agency/company, print a blank form and fill out by hand. To retain that form, scan and attach as an image on the customer's file.
- » Entering the *Effective Date and Hour of Cancellation* will automatically change the policy to *Cancelled* status. When the Client screen is refreshed, the policy to be cancelled will remain on the Policies tab and display as a gray record. When the policy reaches the cancellation date, it will no longer display with the active polices and will only be displayed if the user chooses to view *All* or *Cancelled* policies.

SL	Policy Type	Policy #	Effective	Expiration	Company	Policy Total	Term	Status	A/D	General Agency	Producer
	Per Home App.	HD0055421	09/19/2010	09/19/2011	General Casualty	\$612.00	12 A	D			Dawson, Willie
	Per Auto App.	48241210055	09/18/2010	09/18/2011	Auto Owner	\$267.83	6 A	D			Nichols, Laure
	Per Auto App.	MA0274846	09/18/2010	11/05/2010	General Casualty	\$265.00	12 C	D			Dawson, Willie

Annualized \$1,238.10 \$190.21 All Active Inactive Holding Delete Cancelled Lapsed Rewritten Quoted

Figure 6: Policies Tab (shows policy to be cancelled)

- » The *For Agency/Company Use* tab allows the agency to identify the reason for cancellation.

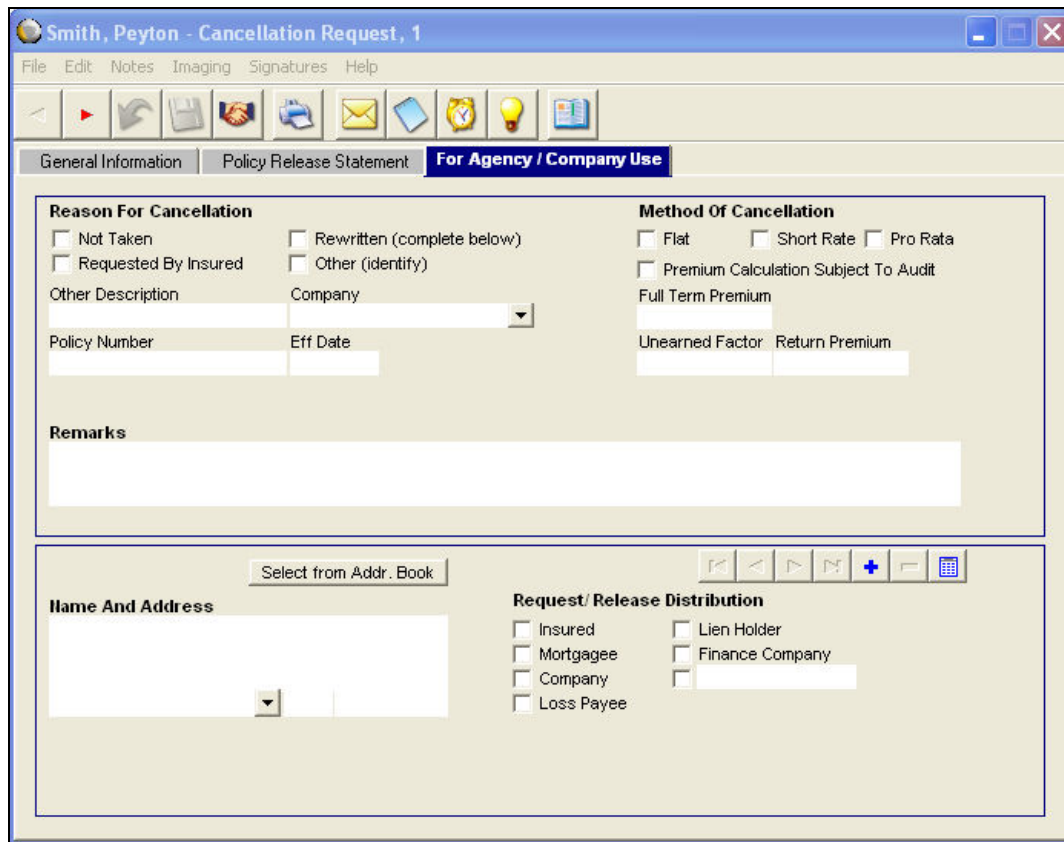
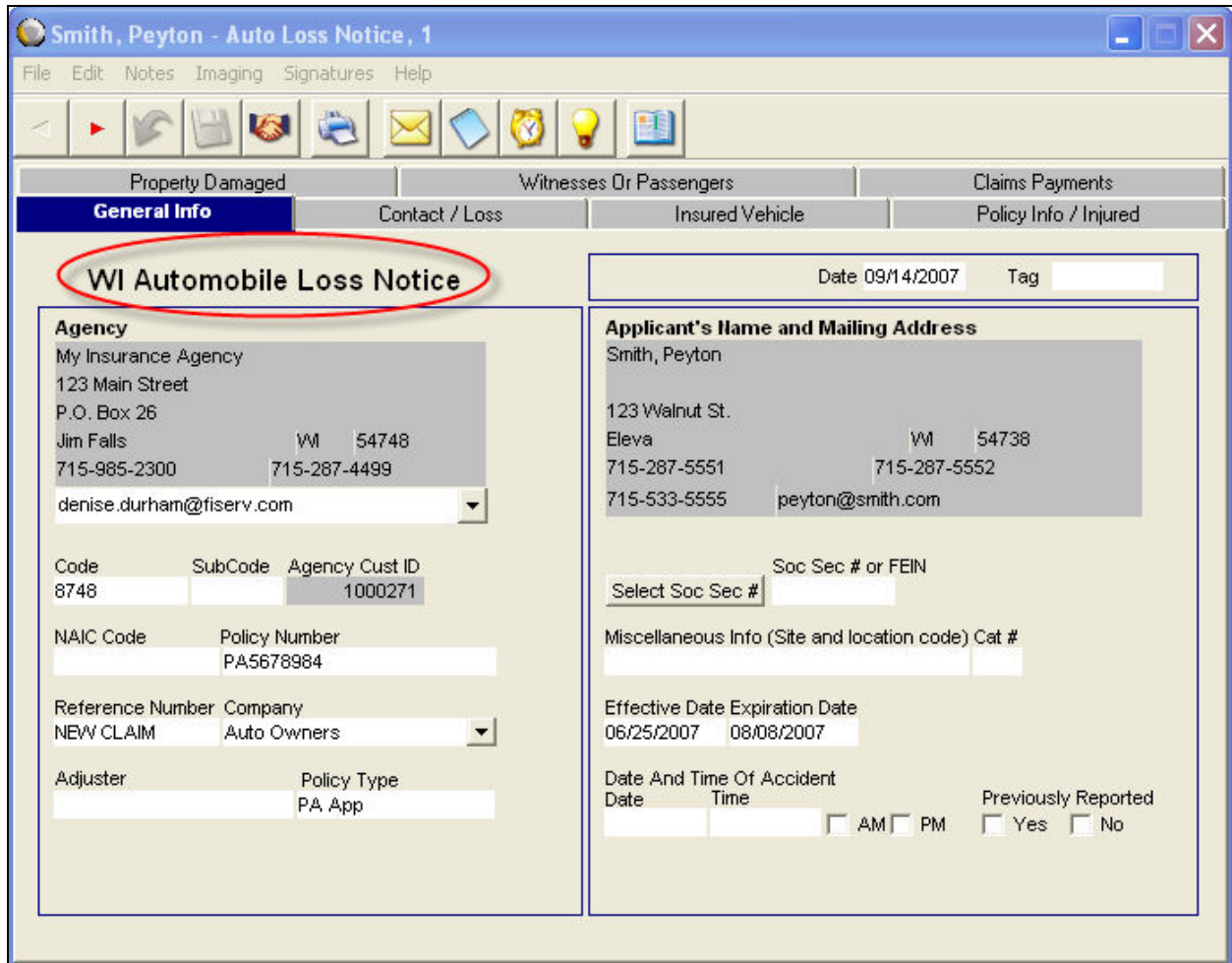


Figure 7: Cancellation Request

Claim

- » There are four loss forms in the system: *Automobile Loss Notice*, *Property Loss Notice*, *General Liability Notice of Occurrence/Claim* and *Workers Compensation – First Report of Injury or Illness*. The claim form will open that applies to the policy selected.
- » The *Company*, *Policy Number*, *Effective* and *Expiration* dates will automatically populate into this form.
- » Look for buttons that allow the user to select information from the policy (i.e. *Select Soc Sec #*, *Select Vehicle*, *Select Driver*, *Select Loss Payee*, *Select from Policy*) instead of having to enter the information manually.



Smith, Peyton - Auto Loss Notice, 1

File Edit Notes Imaging Signatures Help

Property Damaged Witnesses Or Passengers Claims Payments

General Info Contact / Loss Insured Vehicle Policy Info / Injured

WI Automobile Loss Notice Date 09/14/2007 Tag

Agency
 My Insurance Agency
 123 Main Street
 P.O. Box 26
 Jim Falls WI 54748
 715-985-2300 715-287-4499
 denise.durham@fiserv.com

Code SubCode Agency Cust ID
 8748 1000271

NAIC Code Policy Number
 PA5678984

Reference Number Company
 NEW CLAIM Auto Owners

Adjuster Policy Type
 PA App

Applicant's Name and Mailing Address
 Smith, Peyton
 123 Walnut St.
 Eleva WI 54738
 715-287-5551 715-287-5552
 715-533-5555 peyton@smith.com

Soc Sec # or FEIN
 Select Soc Sec #

Miscellaneous Info (Site and location code) Cat #

Effective Date Expiration Date
 06/25/2007 08/08/2007

Date And Time Of Accident
 Date Time Previously Reported
 AM PM Yes No

Figure 8: Auto Claim

- » Each claim form has a *Claims Payments* tab. The purpose of this tab is to enter claim payments made to the insured. If two claim payments are made on the same date, there must be a unique check number on each record.
- » This tab is also where the claim can be marked as open or closed. There is a *Claims Report* which prints a summary of all open claims.

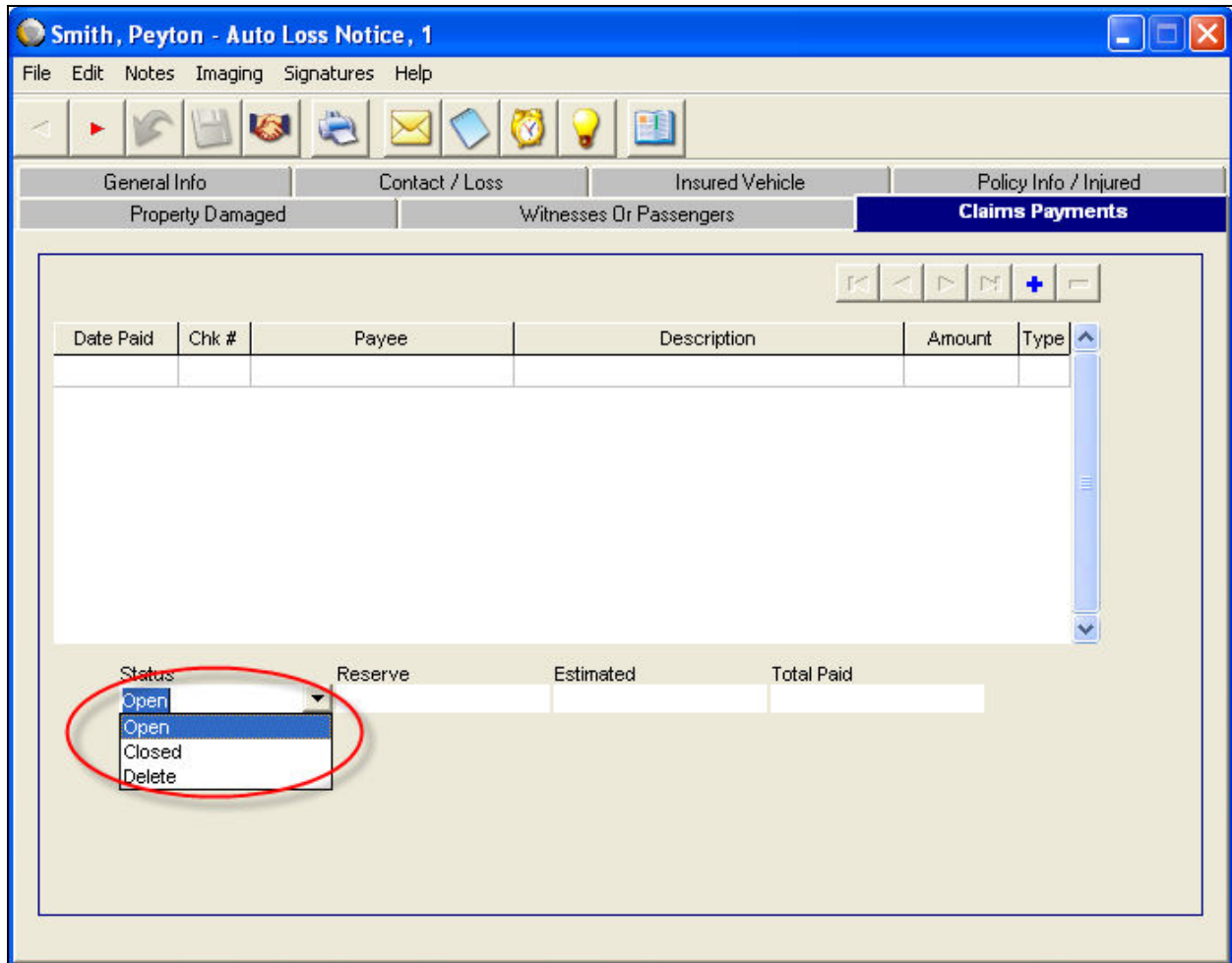


Figure 9: Auto Claim/Claims Payments tab

Certificate

- » Generally, there should be one certificate per customer or at the most, one certificate for each renewal period. Each certificate can have multiple certificate holders.
- » The first time the certificate is created, go through each tab and use the *Select Policy* button to pull forward information from various policies.
- » On the *Cert Holder/Desc of Ops* tab, enter a certificate holder. Use the + button to add additional certificate holders. When adding certificate holders, the user has the option of selecting from the address book, selecting from a policy or manually entering the information. Below the *Certificate Holder* section the user can enter a unique *Description of Operations/Locations/Vehicles/Exclusions/Special Provisions*. Use the arrows in the *Certificate Holder* section to see the *Description of Operations* for each certificate holder.
- » The printer icon will print a certificate for the current certificate holder displayed on the screen. The user can print certificates for all certificate holders by going to *File->Print All*. To skip the disclaimer

page, go *File->Print Preview*. This will open all of the certificates in Adobe Reader. Hit *Print* and select *Odd* pages only in the *Subset*.

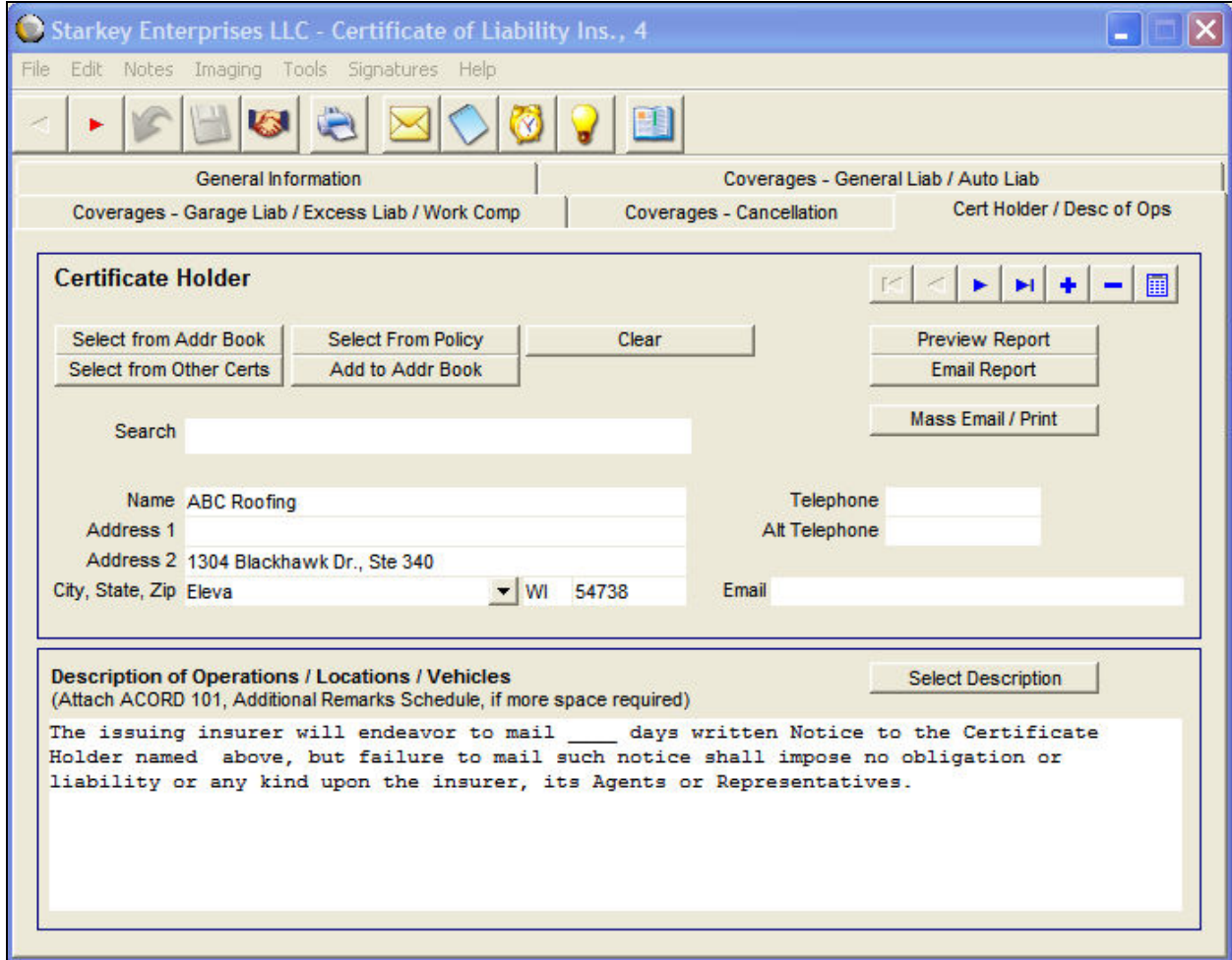


Figure 10: Certificate

- » The *Preview Report* button on the *Certificate Holder* tab will print a list of all the certificate holders for that certificate. The *Email Report* button allows the user to email this report in PDF form.


Certificate Holders			
Customer: Smith, Peyton			
1st Federal Bank			
1256 9th Ave			
Eau Claire	WI	54701	
715-899-9966			
Global Interest			
1442 Snowing Ln			
Afton	WI	53501	

Figure 11: Certificate Holders Report

- » When an additional certificate is needed for the same policy period, go to the *Forms* tab on the Client screen and open the existing certificate. Update any information that is necessary and add a new certificate holder.
- » When the policy renews, there are two methods of doing the renewal certificate. Some agencies simply open the existing certificate and update it. Other agencies will create a new certificate for this renewal. On the *Certificate Holder* tab, they will use the button *Select from Other Certs*. This opens a list of other certificates. Select the previous certificate and then select which certificate holders to bring forward to this certificate.

Mass Email Certificates

Users may do a mass email or print certificates of liability insurance. Each certificate holder will receive a copy of their own cert via email (unless no email address exists). The entire transaction will record to the Tranlog.

1. Click the *Mass Email/Print* button on the Certificate Holder tab.
2. The *Certificate Mass Email/Print* screen will show all certificate holders selected, the user can deselect records as needed.
3. Certificate holders that have an email address will default to email. The rest will default to print. The user may edit an email address but must press the Save button to have it email correctly and update the Certificate Holder record.
4. One certificate will be sent to each certificate holder. (Use CC or BCC fields to select an email address to carbon copy or blind carbon copy.)
5. Edit the default subject if desired, type in message.
6. Click Run .

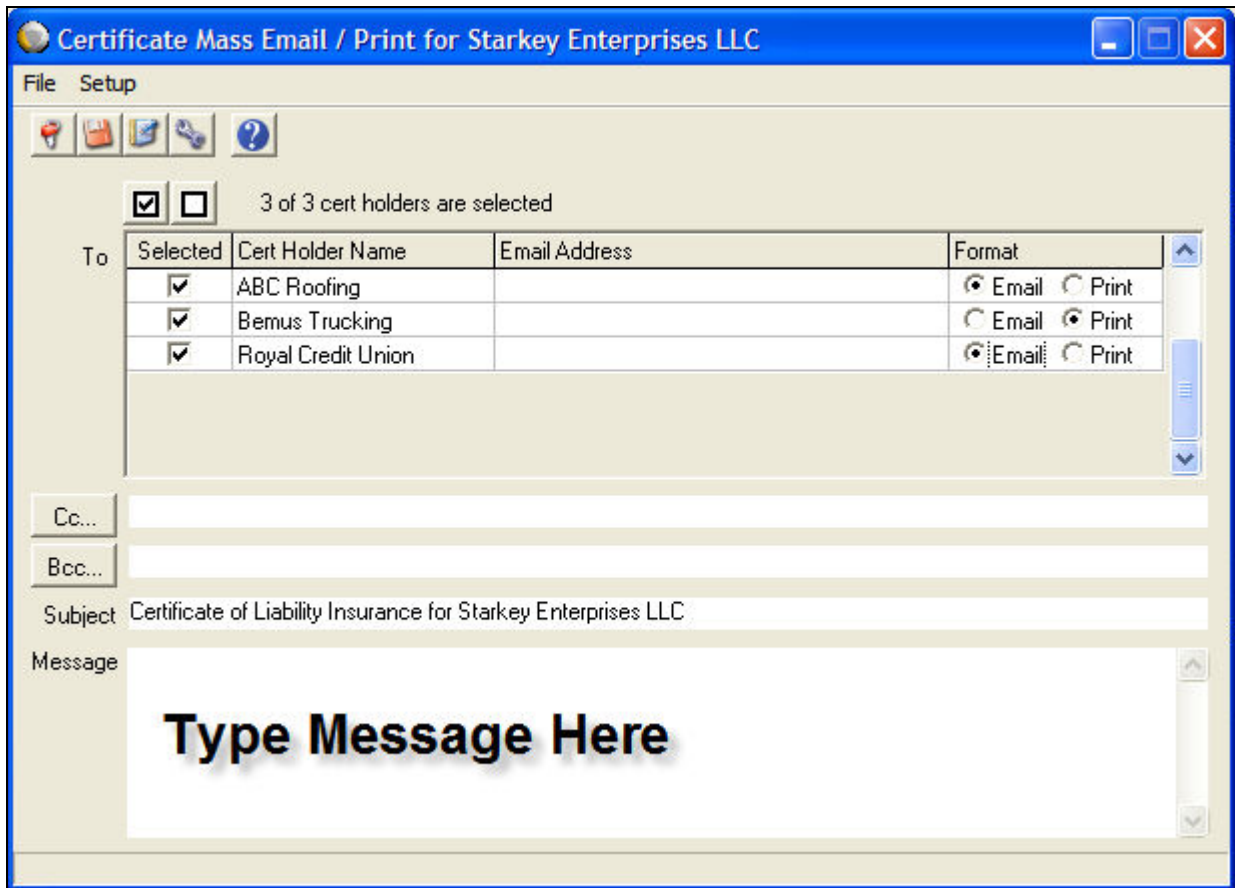



Figure 12: Certificate Mass Email/Print screen

If the user would like a default email signature to appear on the mass emailed certificates, click the *Certificate Mass Email/Print* button. Click the Change Signature button . Type in the email signature and click OK. The next time the *Certificate Mass Email/Print* button is used, the signature will pull in by default.

The system will indicate how many certificates will process and ask the user if they would like to continue. When the user answer "Yes", the emails will start to send and the certificates to be printed will go to the printer. When all certificates are emailed/printed, a Tranlog will appear. The user can add notes at the top, select a different Tranlog category, create a FollowUp and then save the Tranlog.

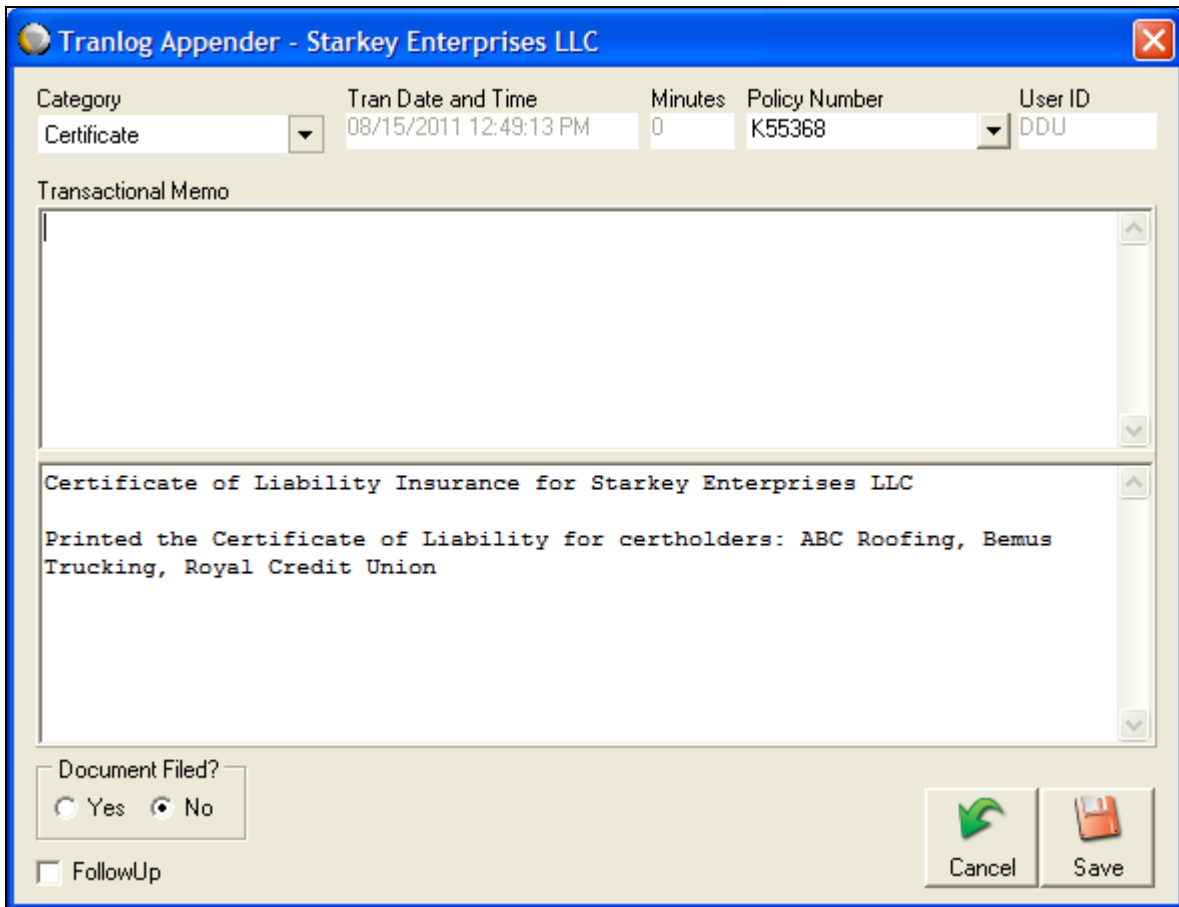


Figure 13: Tranlog

Default Description of Operations

Users are able to add a default list for *Description of Operation/Locations/Vehicles* to save time in repetitively entering the same information. To add a list of default descriptions:

1. Open a certificate, go to *Tools* and click *Setup Default Description of Operations*

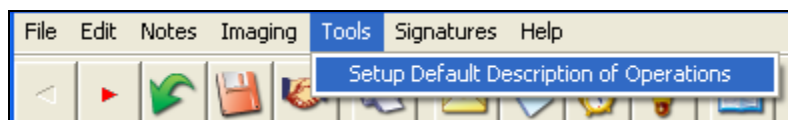


Figure 14: Setup Default Description of Operations

2. Click the + button to add a description

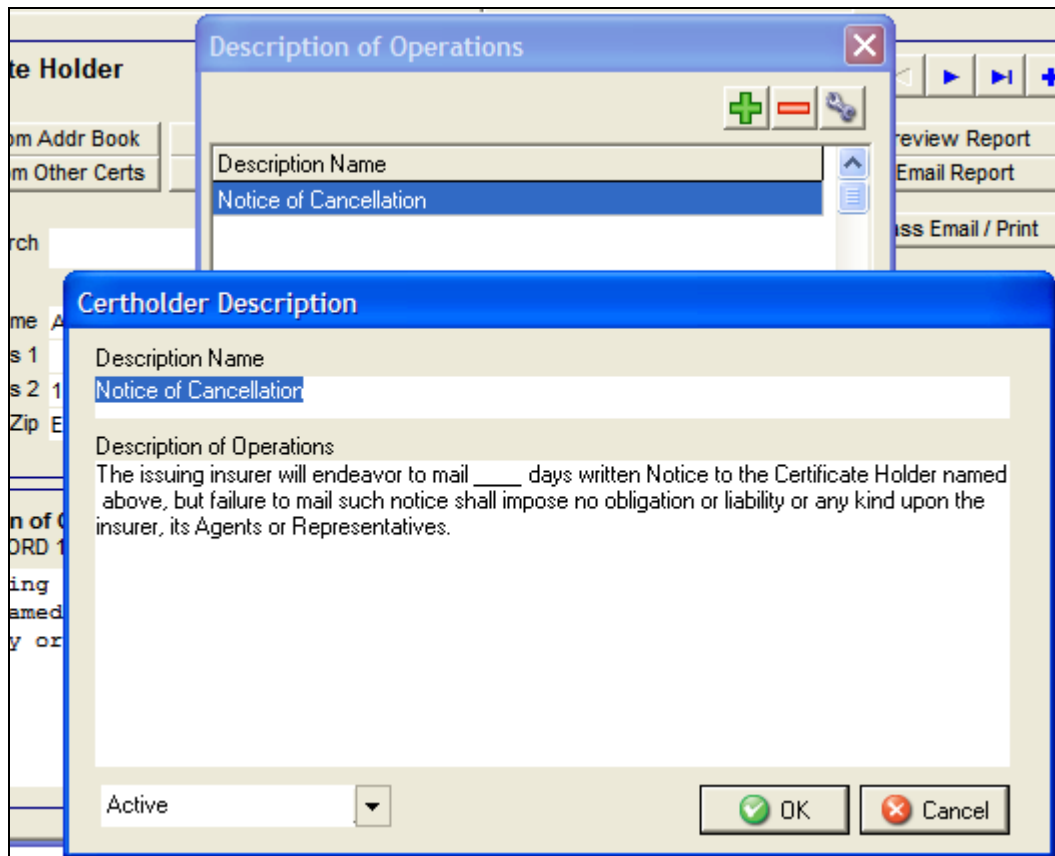


Figure 15: Adding a default Description

3. Enter a short description name at the top
4. Enter the text that will pull into the Description of Operations
5. Click OK to save the default text
6. Click OK to save and exit the setup

To use the default descriptions after they are added click the *Select Description* button on the *Description of Operations/Locations/Vehicles* section of the *Cert Holder/Desc of Ops* tab. Highlight the description to be used on the certificate and click OK.

The default descriptions added to the system will be available for all certificates on all clients.

Financial Responsibility Form (SR-22)

- » The *Company, Policy Number, Effective* and *Expiration* dates will automatically populate into this form.
- » Use the *Select Driver* button to select a driver from the policy.
- » *Add* and *Delete* vehicles as needed. The form supports a maximum of two vehicles or the user can select the option of *All Owned and Non-Owned Vehicles*.

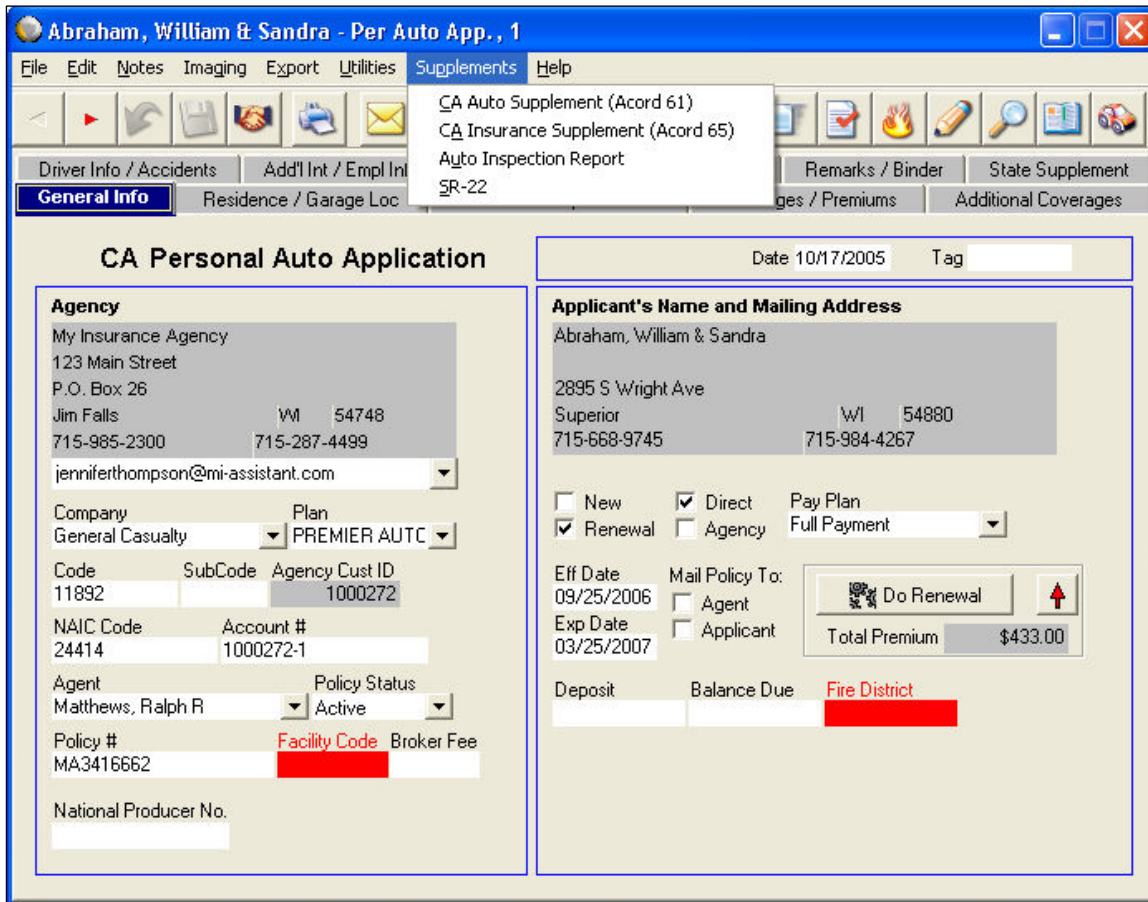
Auto ID Cards

The auto ID cards are printed from the Client screen. The ID cards will vary by state.

1. Highlight an Auto policy and click on the *ID* button on the top toolbar.
2. Some information such as effective and expiration date and some state specific fields can be edited.
3. Hold down the Control key and click on the vehicles needed.
4. Hit *Preview* or *Email*.
5. If previewing, print the form. If emailing, complete the email form.

Supplements

- » The *Commercial Professional Liability, Restaurant/Tavern Supplement* or *Contractors Supplement* can be created by highlighting a commercial policy on the client screen and click the *New Forms* button.
- » Several other supplements are found on the applications themselves under the *Supplements* menu. These include: CA and AZ Auto Supplement (ACORD 61), AZ Auto Supplement Spanish (ACORD 62), CA Insurance Supplement (ACORD 65), Auto Inspection Report, CA Earthquake Coverage (ACORD 66), CA Property Ins Disclosure (ACORD 67), CA Computation Disclosure (ACORD 68) and Lender's Loss Payable Endorsement (FORM 438BFU).



Abraham, William & Sandra - Per Auto App., 1

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CA Auto Supplement (Acord 61)
CA Insurance Supplement (Acord 65)
Auto Inspection Report
SR-22

Driver Info / Accidents Add'l Int / Empl Int
General Info Residence / Garage Loc

Remarks / Binder State Supplement
Pages / Premiums Additional Coverages

CA Personal Auto Application Date 10/17/2005 Tag

Agency
My Insurance Agency
123 Main Street
P.O. Box 26
Jim Falls WI 54748
715-985-2300 715-287-4499
jenniferthompson@mi-assistant.com

Company Plan
General Casualty PREMIER AUTC

Code SubCode Agency Cust ID
11892 1000272

NAIC Code Account #
24414 1000272-1

Agent Policy Status
Matthews, Ralph R Active

Policy # Facility Code Broker Fee
MA3416662

National Producer No.

Applicant's Name and Mailing Address
Abraham, William & Sandra
2895 S Wright Ave
Superior WI 54880
715-668-9745 715-984-4267

New Direct Pay Plan
 Renewal Agency Full Payment

Eff Date Mail Policy To:
09/25/2006 Agent Do Renewal
Exp Date Applicant Total Premium \$433.00
03/25/2007

Deposit Balance Due **Fire District**

Figure 16: Supplements

How to Retrieve a Form

To view forms previously created or to re-open and edit a form:

1. Go to the *Forms* tab on the Client screen.
2. Select the type of form at the top by clicking the form name.
3. Double click on the form or highlight the form and click the *Open* button.

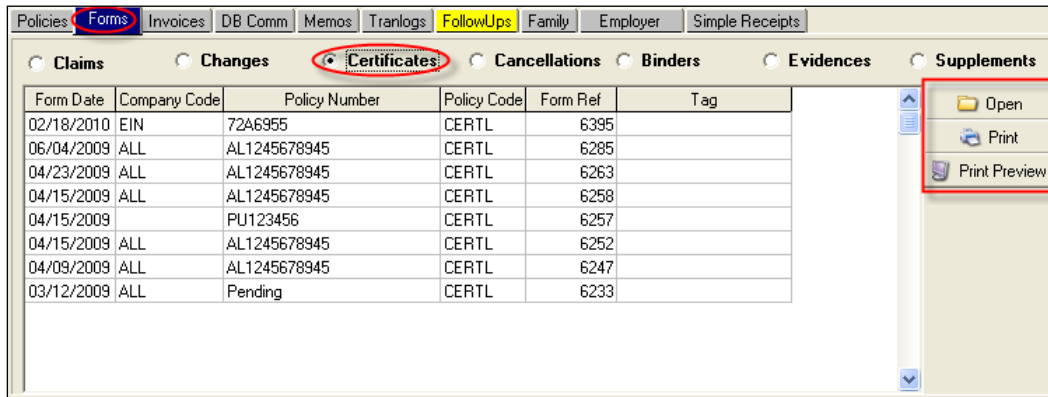


Figure 17: Forms Tab

How to Assign a Signature to a form

A user will only have access to the signatures that they have been authorized to use. Signatures can only be inserted into the ACORD applications and forms.

1. On an ACORD application or form, click the Signatures menu option.
2. A dropdown will appear with the signatures available to the user. Select the signature that will be inserted in the document. A signature has to be selected once for each application or form by each user. The application or form will continue to use the signature selected until the user changes the signature.

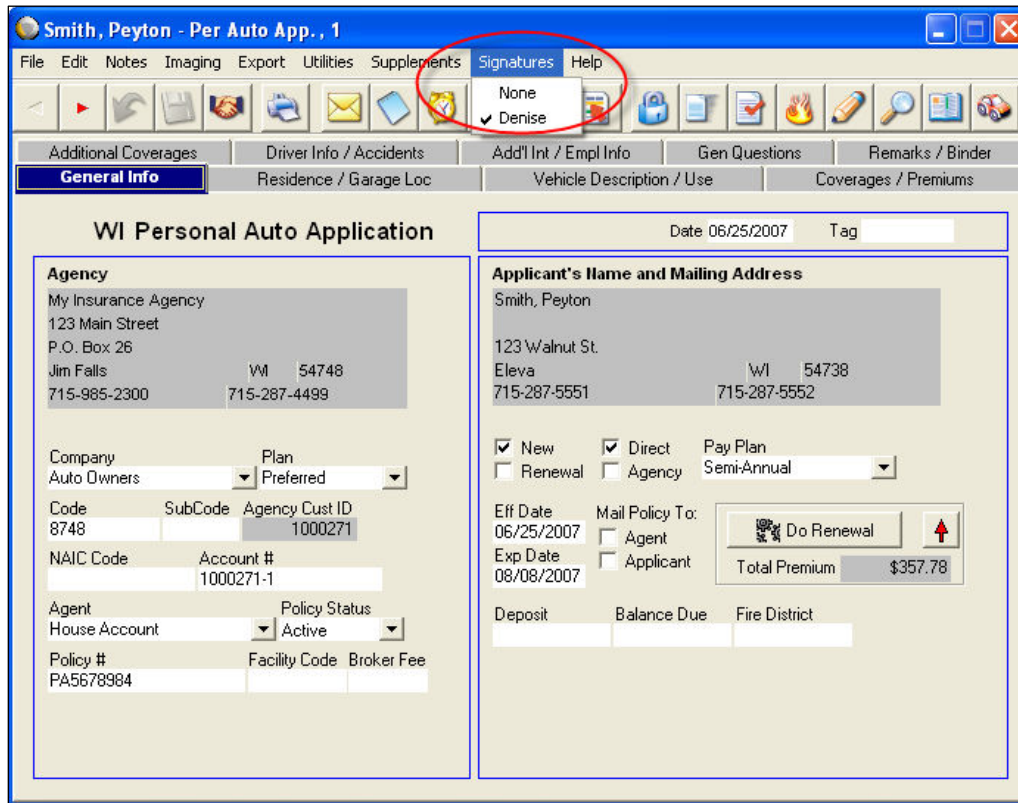


Figure 18: Signatures

Obtaining Support

If you have any questions about this training, please contact FSC Customer Support. Thank you and enjoy using FSC Manager!

West Coast Customer Support: 800-433-2550
 Midwest Customer Support: 800-401-2895
 Email: fscmanagersupport@fscsolutions.com