Policy Correspondence/Printing Verification of Coverage

This document provides the steps to guide you to create and send policy correspondence from AMsuite.

- Create Policy Documents
- Send Policy Documents to Recipients

Key Benefits

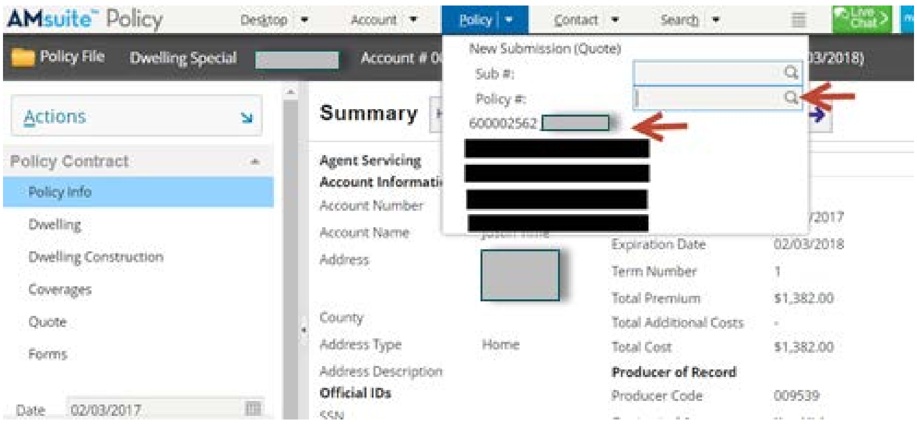
AMsuite is American Modern's state-of-the-art software solution. It consolidates the policy administration, claims and data applications into one platform for all Personal Lines products.

From motorcycles to manufactured homes, users will benefit from the same functionality, flow and flexible navigation. In a nut shell, AMsuite will make it easier for you to do what you do best—serve customers.

Create Policy Documents

Before you can send policy correspondence, you'll first need to locate the policy.

1 Click **Policy.** Enter the customer's 9-digit policy number. Click the search icon. It may be in your drop down list to click on also.
You could also locate the policy by accessing the Account, and then select the policy.



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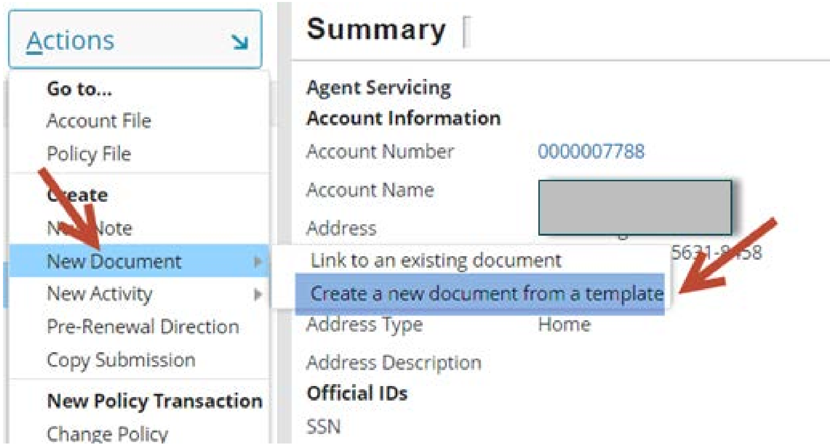
2 Click **Actions**. Select **New Document** from the **Actions** menu.
Select **Create a New Document from a template**.



3 Select a template. Click the search icon to choose from a list.

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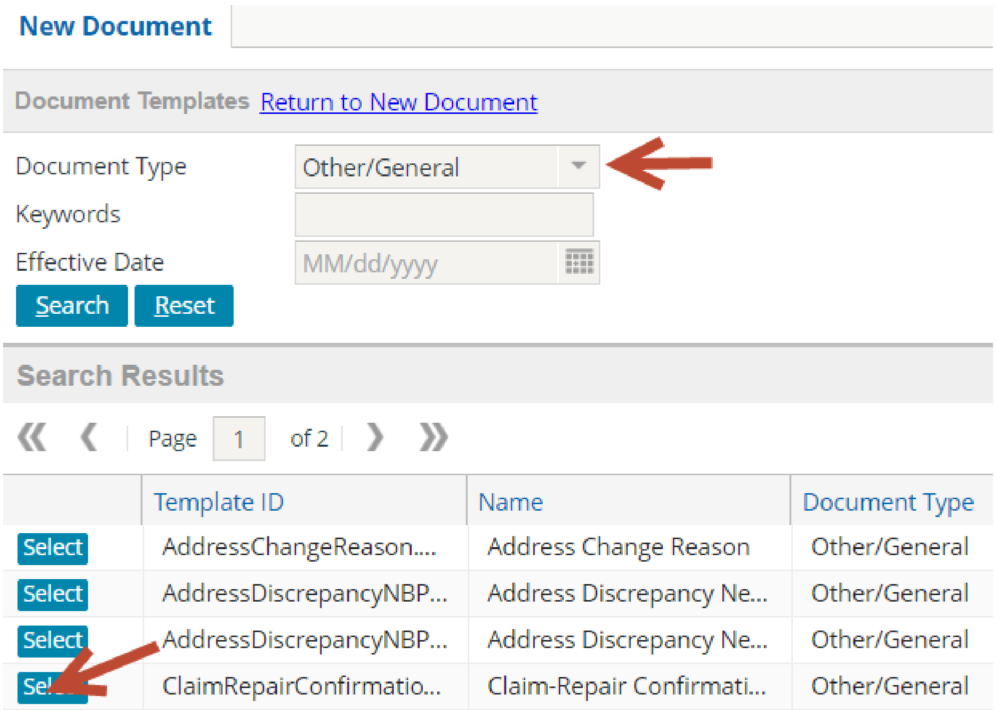
4 Select a **Document Type**.



5 The list of templates is displayed at the bottom of the page. Scroll to Page 2 for additional templates.

Locate the template you want and click **Select**.

Pay attention to the template names and whether they are written for policy holder or producer.

6 Click **Create document**.

The template will open as a pre-populated word document.

7 Update the document with changes, if necessary, and run spell check.

Review the entire document for leftover prefill text, such as {enter free form}.

If you know you will be sending the document to multiple recipients, put cc: and the names at the bottom of the document. This will remind you of the primary recipient and who was copied, since you will have to do this manually.

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8 Browse to a location on your computer and save the document to your department or 3 agency's agreed-upon location.

The document will become available in AMsuite Policy in PDF format.

Send Policy Documents to Recipients

9 To send the document to a single recipient, select **Browse** to locate the document you just saved.

10 Click the **Recipient Type** search button to select a recipient type.

If you are not sending the document yet, such as when you prefer to print or send via e-mail, select 'Yes' to **Image Document Only**.

11 If you are sending it now, check one **Recipient type** option: Producer, Contracted Agency, or Policy contact. Only one recipient can be selected.

Click the drop-down arrow and select a **Recipient** from the list.

12 Click **Update**. If you selected a single recipient, you are done.

If you selected 'Yes' to **Image document only**, determine if you need to e-mail it.

If you need to e-mail it, click **Documents** in the **Sidebar**.

- Click the **Documents** tab. Locate the document in the list.
- Click to open the PDF document.
- Click the icon to send the e-mail and it will go through the proper encryption. If it goes to one recipient, you do not need to do anything further. Follow the prompts.

13 If you do not need to e-mail it now, determine if you need to follow up on this. If so, set a reminder activity for yourself.

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- Click **Actions**, **New Activity**.
- Select **Reminder**.
- Select a **Reminder type** from the list.
- Add a note to the activity. The note will remain on the policy even after the activity is completed.
- Set the date according to the date on the document. If this is for a single recipient, you do not need to do anything further.

**Remember never to store Non-Public Personal Information (NPPI) in the note fields. Notes become part of the official record and cannot be deleted. Therefore, do not enter any personal or unprofessional comments.

Review the *Using the Desktop to Manage Activities* module for more information on activity management.

Multiple Recipients

14 To send to multiple recipients, make sure the policy is open, and click **Documents** from the **Sidebar**.

15 Click the **Documents** tab.

16 Check the box for the document you want to send and click **Send Print Request**.

17 Select a **Recipient** from the list. If you already sent it to a single recipient, this process allows you to send it to additional recipients. If you added the cc: at the bottom of the document, you can use this list for reference.

18 Click **Send**.

Repeat this process for each recipient

For questions about using AMsuite, contact American Modern's Customer Service Team @ 1-800-543-2644.