

# Travelers PL Electronic Policy View Daily Activity Report updates

Updated March 12, 2012

Travelers continues to look for ways to make it easier for our Independent Agents to do business with us. From *Agent HQ*<sup>SM</sup> to our quoting and issuing systems, we are committed to building an infrastructure that helps agencies increase efficiencies and grow more profitably in the long term. The PL Electronic Policy View (EPV) Daily Activity report is one of the many tools we offer to improve your productivity and profitability.

The EPV Daily Activity report is a listing of daily business activity by producer code that includes insured name, policy number and date of transaction.

Effective February 12, 2012, we implemented several enhancements to this report. The next few pages list the enhancements, explain how to access the report, search for specific dates and export a report into a spreadsheet. Frequently asked questions are listed at the end of this document.



#### February 12, 2012 enhancements to EPV Daily Activity report:

- •You can now search for a report for one date or a range of dates.
- •Transactions for multiple producer codes can now be accessed on one report.
- •The insured's copy of the policy document can be viewed directly from the report. **Note:** Effective March 12, the agent's copy will also be available for viewing.
- •The information in the report can now be exported into an Excel spreadsheet.



#### **Accessing the Report**

The EPV Daily Activity report is available under Reports & Alerts on the right side of the Agent HQ home page. You can also access this report under Tools & Information on the left. Expand Reports & Alerts by clicking "+"; the EPV Daily Activity report will display in a list below.

ATLAS<sup>3</sup> Boat/Yacht

Florida TravQuote

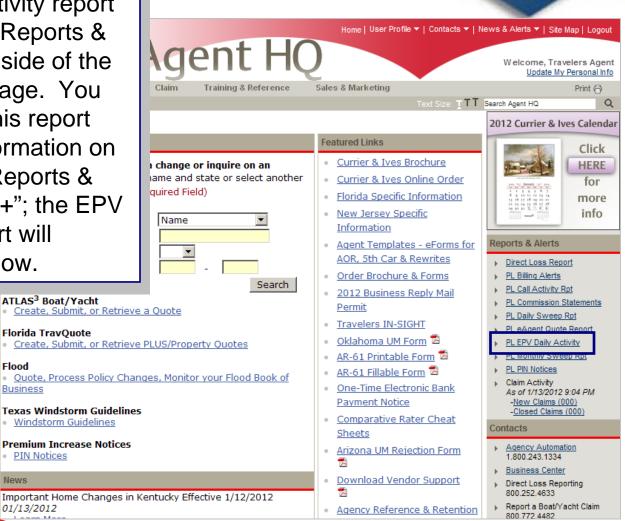
Windstorm Guidelines

PIN Notices

01/13/2012

Flood

Business





Host Access

Quote & Issue

References & Manuals

■ Replacement Cost Tools

Direct Loss Report

PL Call Activity Rpt

PL Daily Sweep Rpt

PL EPV Daily Activity

PL Monthly Sweep

PL eAgent Quote

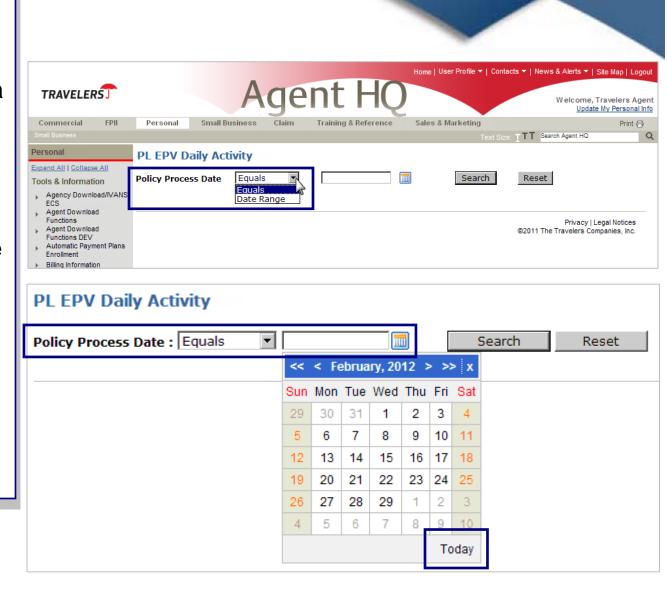
PL Billing Alerts

Reports & Alerts

#### **Selecting a Date**

You can access a report for one date or select a date range. To access a report for one date, select **Equals** in the **Policy Process Date** field.

To enter a date, click the calendar icon or the blank field to the right of **Policy Process Date**. Enter the date in the blank field, or click a date on the calendar. To select the current date, click **Today**.





#### **Selecting a Range of Dates**

To access a report for a range of dates, select **Date Range**. Enter the beginning date in the blank field to the right or click the first calendar icon and select it. Click the second calendar icon or next blank field to select the end date. The date range must be within 31 days.

To change the month or year, click the single arrow at the top of the calendar to change the month or click the double arrows to change the year. You can also click the month and year at the top of the calendar to change your selection.

When you have completed selecting your dates, click **Search**.

To clear entered dates, click **Reset**.



#### **Viewing the Report**

The EPV Daily
Activity report
displays each agent
code associated
with your *Agent HQ*ID that has policies
available.

To display or close all records for the agent codes listed on the report, click **Expand All** or **Collapse All**. To display all records for a specific code, click the arrow to the left of the agent code.



Note: Massachusetts auto policies now display on the EPV Daily Activity report; the fields for Named Insured, Full Term Premium and Transaction Premium will be blank.



## Viewing Policy Documents

The Transaction Type column indicates if the document is the insured or agent copy. Each document displays on a separate row.

The insured copy will display 1-3 days after the agent copy.

m Date: 01/02/2012 to 01/06/2012)

o Excel

Polic	су	Named Insured	Policy Number	Transaction Type		Transaction Eff- Date	Process Date
Agent Code: 0X0001 (CITY INSURANCE AGENCY) - 1 records							
L	<del></del>	PAM POLICYHOLDER	0987654321-101-1	Renewal - Agent	05/04/2012	05/04/2012	03/05/2012
8	Agent Code: 0Z0002 (COUNTY INSURANCE AGENCY) - 3 records						
-	人	CHARLES & CATHY CUSTOMER	0999888777-101-1	Renewal - Agent	05/04/2012	05/24/2012	03/05/2012
F	<u> </u>	GEORGE & HELEN INSURED	0995553331-633-1	New Policy - Insured	05/04/2012	05/24/2012	03/05/2012
	<u> </u>	GEORGE & HELEN INSURED	0995553331-633-1	New Policy - Agent	05/04/2012	05/24/2012	03/06/2012
Agent Code: 0Q0005 (STATE INSURANCE GROUP) - 1 records							
L	人	HARRIS HOMEOWNER	0987776654-633-1	Renewal - Insured	05/04/2012	05/24/2012	03/06/2012

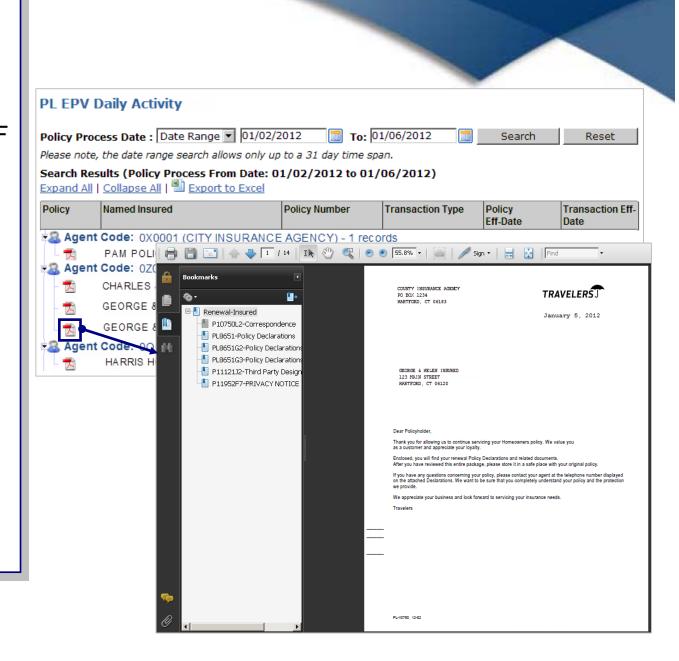


### Viewing a Policy Document

To view a copy of the policy document from the report, click the PDF icon next to the insured's name. You can print the document or save it to your computer.

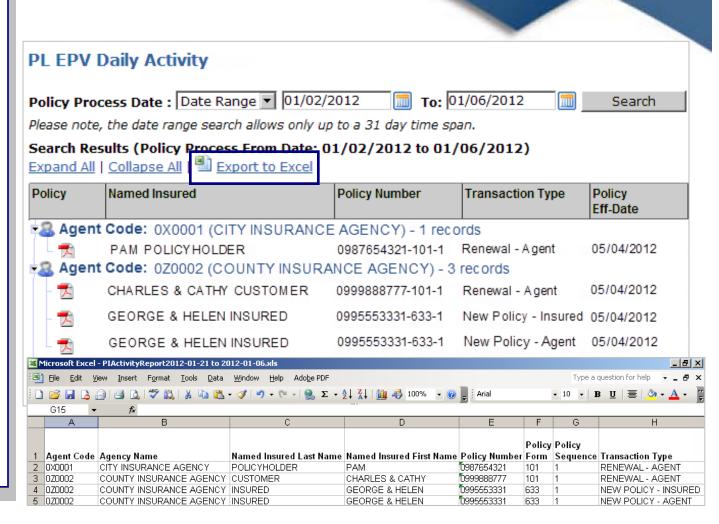
Note: The Transaction Description column is not displayed on the updated EPV Daily Activity report. A description of the transaction can be found on the insured's policy document.





## Exporting the Report to an Excel Spreadsheet

To export the information in the report to an Excel spreadsheet, select **Export to Excel.** All data will be exported whether the display is expanded or collapsed. You can sort and filter the information in the spreadsheet and save it to your computer.





#### **Frequently Asked Questions**

#### **How do I get access to the EPV Daily Activity report?**

Agents are provided access to the report by their local Agency User Administrator (AUA). If you do not know your agency's AUA, click the Your Agency User Administrator link under the User Profile section in the top navigation of *Agent HQ*. If you still need assistance, please call the Travelers Automation Support Helpdesk at 1-800-243-1334, option 5.

#### Will the EPV Daily Activity report require a special installation or password?

No. Once your AUA has given you access, you will see the report on the *Agent HQ* home page.

#### Which producer codes can I see on the report?

You will be able to view the report for any producer codes that are aligned with your *Agent HQ* ID. If you are missing any specific producer codes, please contact your AUA to have that code aligned with your ID.



#### Frequently Asked Questions, continued

#### How many results will be displayed on the report?

Results returned will display up to a maximum of 2,000 records for the date or date range selected.

#### What is the "Electronically Delivered" column on the Excel spreadsheet?

This column will be used for future enhancements.

If I select a date range on one day and run the report, why are there more policy documents if I select the same date range and run the report several days later?

The agent's copy and the insured's copy of the policy documents generally become available at different times.



#### Frequently Asked Questions, continued

#### What types of policy activity documents are available in the application?

The insured's copy of the policy documents is available in the EPV Daily Activity report. To view the agent copy, please access the Policy View application. All types of policy activities are included in the EPV Daily Activity report except for the following:

California earthquake letters

New York anti-arson letters

Out of state license letters

Homeowner cancellations

Homeowner nonrenewal letters

Florida mold letters

- Florida cancellation and termination notices
- •Homesaver/Dwelling Fire, Umbrella and Personal Articles Floater cancellation and termination notices

These types of policy activities are available through the Policy View application on *Agent HQ*.

