Manage Policies

This chapter explains how to locate and manage all of your CollaborativeEdge transactions.

The Manage Policies Page displays your company's transactions, along with a detailed status of each. To access the Manage Policies Page, click on Manage Policies from the main menu.

The Manage Policies Page displays.

Manage Policies Page

The Show drop down list controls what transactions are displayed. Click on the Show drop down list to select one of the following display options:
1. All Policies (default)
2. Endorsements
3. Policies that are ready to submit
4. Policies that have been selected for submission
5. Policies that have been sent for processing
6. Policies with processing acknowledgements received
7. Policies that require further modifications before being sent for processing

The **Sort By** drop down list orders how the transactions are displayed. Click on the **Sort By** drop down list to arrange the display according to specific criteria. The choices are:

- Date of last update (default)
- Company
- Transaction Type
- Applicant Last Name
- Status
- Userid

The **In** drop down list refines the order of display based on your Sort By choice. Click on the **In** drop down list to select either ascending or descending (default) order.

**Manage Policies Page: Directions**

1. Click the **Process** button to retrieve page data once you have selected your display criteria as described above.
2. Click on the **Company** hyperlink for a particular transaction in order to revisit it.
3. Click on the **Status** hyperlink for a particular transaction in order to go to the Status Change Page for it.

The following information is displayed on the Manage Policies Page:

<table>
<thead>
<tr>
<th>Last Name</th>
<th>The Applicant's Last Name as it appears on the Applicant Page.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Policy Number</td>
<td>The policy number assigned to the transaction.</td>
</tr>
<tr>
<td>Company</td>
<td>The Company Name for each transaction processed. If no company was selected from the Company Page, NIL will appear here.</td>
</tr>
<tr>
<td>Current Page</td>
<td>The last input page that you were on when processing the transaction.</td>
</tr>
<tr>
<td>Status</td>
<td>This field will reflect the current status of your transaction. The current values are: <strong>Pend</strong> -- Policies that require further modification before being sent for processing. <strong>Submitable</strong> -- The transaction passed final form validation and is ready to be submitted. <strong>Policy Rejected</strong> -- The processed transaction contains underwriting errors. <strong>Selected for Submission</strong> -- The submitted transaction passes all edits, is ready for transmission, and has been selected for transmission. <strong>Submitted to M/F</strong> -- The transaction has been sent for processing. <strong>First Acks Rcvd</strong> -- The transaction was successfully transmitted, is being</td>
</tr>
</tbody>
</table>
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<table>
<thead>
<tr>
<th>Transaction</th>
<th>The transaction type such as New Business, Endorsement etc.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Batch Seq</td>
<td>The processed transaction’s batch sequence number.</td>
</tr>
<tr>
<td>Updated</td>
<td>The date and time a transaction was last accessed.</td>
</tr>
<tr>
<td>Userid</td>
<td>The User ID of the user to last access the transaction</td>
</tr>
</tbody>
</table>

**Manage Policies Page: Paging Functionality**

At the bottom of the page are buttons, which reflect the number of pages of transactions that exist on CollaborativeEdge, given the selected criteria. To go to another page of transactions, click on the page number, NEXT or PREVIOUS whichever option is applicable.

**Status Change Page**

The Status Change Page allows you to determine the status of an individual transaction.

In order to access the Status Change Page, click on the Status hyperlink for a particular transaction from the Manage Policies Page. The Status Change Page displays:
1. Click on the **Request** drop down list to select one of the following policy processing options for the selected transaction:

   2. **Keep** to keep the transaction in the system
   3. **Detail** to view a detailed description of the status
   4. **Brief** to view a brief description of the status
   5. **Delete** to remove the transaction from the system
   6. **Submit** to submit the transaction for processing
   7. **Un-Submit** to un-submit the transaction from being processed
   8. **Edit** to re-visit transaction after processing acknowledgement has been returned

9. Click the **Process Policy** button to process your request.

**Manage Policies: Notes**

If a transaction was pended, it will read as PEND under the Status section, with the name of the last screen entered under the Current Page Column.

To retrieve the transaction and complete the entry, click on the **Company** field. This will bring you to the last input screen.

You can access the Manage Policies page from the bottom of any other page, in addition to the Main Menu.