Managing Submitted Business

Procedure/Function	Where Accomplished	How Accomplished
Running the Submitted Business Reports (Pending Case Status Reports)	Reports	First, you must be tracking the Pending cases (refer to the Tracking portion of this guide for more information on tracking Pending cases). Access Reports then select POLICIES. Select the desired Submitted Business Report then create your query based on date ranges (i.e. submitted date), policy status (i.e. “Pending” cases), etc. Run your query and print your report.
Contacting Carrier Contacts	Carrier/Administrator Manager	Access the Carrier/Administrator Manager and select the desired carrier or administrator record. Once displayed, access the CONTACTS/PRODUCTS tab and locate the desired contact. You may now contact the desired individual and enter notes on your conversation which can be attached to the policy record to which they pertain or the carrier/administrator record. You may also enter new contacts and pertinent information from this screen.