



Search & Assign Policies in Suspense

Procedures

Interface Management

Assign Items in Suspense

Policies is already checked

click Run on the far right

Your Suspense columns should look like mine. If not, click Select columns and add and remove.

Assign Policies in Suspense Filter Defaults Select Columns

Search where Find

<input checked="" type="checkbox"/>	Lookup Code	Brch	Tss Loc	Account Name	Policy Number	ICO	Line	Received	Tran...	Effective	Expiration	Package	Address
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1. Search by Branch code- Click the Brch column once
2. On your keyboard type in your 3-letter branch code quickly (if you don't know your code please ask us)
3. This will search all your policies that were downloaded under your branch code- not all carriers download by branch code.
4. Search by Account name – Click Account Name column and type in the first 3 letters of the first name of the account you are searching for- JAM for James. Then scroll down the list to find your policies. If not found, search by the spouse's first name.

Now, you can click FIND, Select Existing, Update Existing

Existing Clients/Policies - Change Eff/Exp Dates Se

Policies: Contracted Prospective History Clients: Active Inactive

Search where Policy Number Begins With GA4154609950 Find

Lookup Code	Account Name	Policy Number	Effective	Expiration	Policy Type	Policy Descrip...	Address	Status Descri
BOYLELO001	Lori & William Boyle	GA4154609950	4/26/2018	4/26/2019	PPKG	Personal Pack...	7610 Wonderview Dr Wonder Lake, IL ...	MULTI

0.61s | POLSUSPL



If the Update Existing is grayed out- the dates are incorrect in EPIC.

Effective	Expiration	Policy Type	Policy Descript...	C/P	Address	Statu
2/1/2019	8/1/2019	AUTO	Personal Auto...	P	4608 Wallace Ave #6 Kansas City, MO ...	New

Click Cancel

Click the blue Change Eff/Exp Dates on the right. Click Yes

Click Finish

Click Select Existing

Update Existing

Once you have the Lookup code, then it will download the next business day.

Lookup Code	Brch	Iss Loc
OSUNAJU001		MO

Close the Follow up on Download Activity