

Duck Creek Training

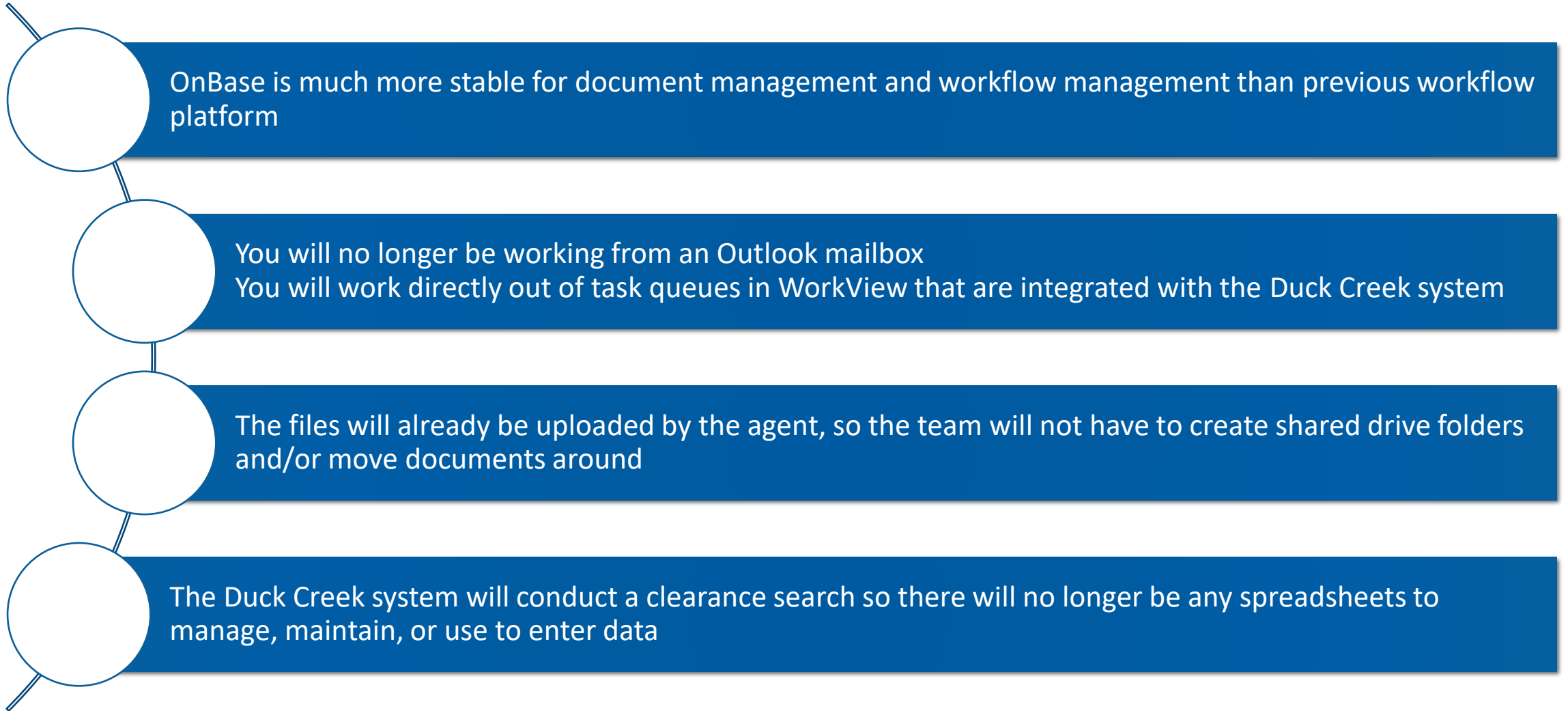
Introduction to the Business Center's Fleet Process

What This Training will Cover

- Benefits to the Business Center
- Overall Fleet Process
- The Business Center's Fleet Process

Benefits to the Business Center

Business Center Benefits



Overall Fleet Process

Register Submission



★ Doc Review & Clearance



Prep Account



UW Review



Policy Issuance

Quote

Interim Process completed by **Business Center Policy Support Specialist**

After Agent Go-Live, completed by **Agent**

Business Center

- Review documentation
- Determine if the documentation is complete to clear
- If not, request additional documentation from Agent
- Send Agent notification if Duck Creek does not clear the submission
- Index documents

Account Manager

- Review documentation
- Determine if complete to clear
- Clear or request additional information
- Send notification if not clear

Underwriter

- Review risk
- Perform Risk Assessment
- Obtain missing info from Agent
- Price account
- Determine if Reinsurance is needed
- Document observations and pricing decisions
- Create Quote
- Negotiate with agent
- Perform Quality Review

Account Manager

- Perform OFAC
- Bind and issue
- Follow up on Quote Conditions
- Notify Billing of cash deposit

Business Center

- Perform Filings

★ Unlike existing business segments that proceed directly to quoting, Fleet uses the Submission module within Duck Creek.

SLAs:

| | | | |
|-----------------------------------|---------------------------|---------------------------|-------------------------------------|
| Doc Review and Clearance: 2 hours | Manage using Need by date | Manage using Need by date | 5 business days |
| Indexing/Splitting Docs: 24 hours | | | Facultative Reinsurance: <i>TBD</i> |
| | | | Filings: 2 hours |
| | | | Complete UW Doc: <i>TBD</i> |
| | | | Print Auto ID Cards: Same Day |

Assessment Question 1

OnBase is much more stable for document management and workflow management than AcroSoft.

True or False

Assessment Question 2

Until Agents are using the Duck Creek system, the Business Center will need to register Duck Creek fleet submissions.

True or False

Assessment Question 3

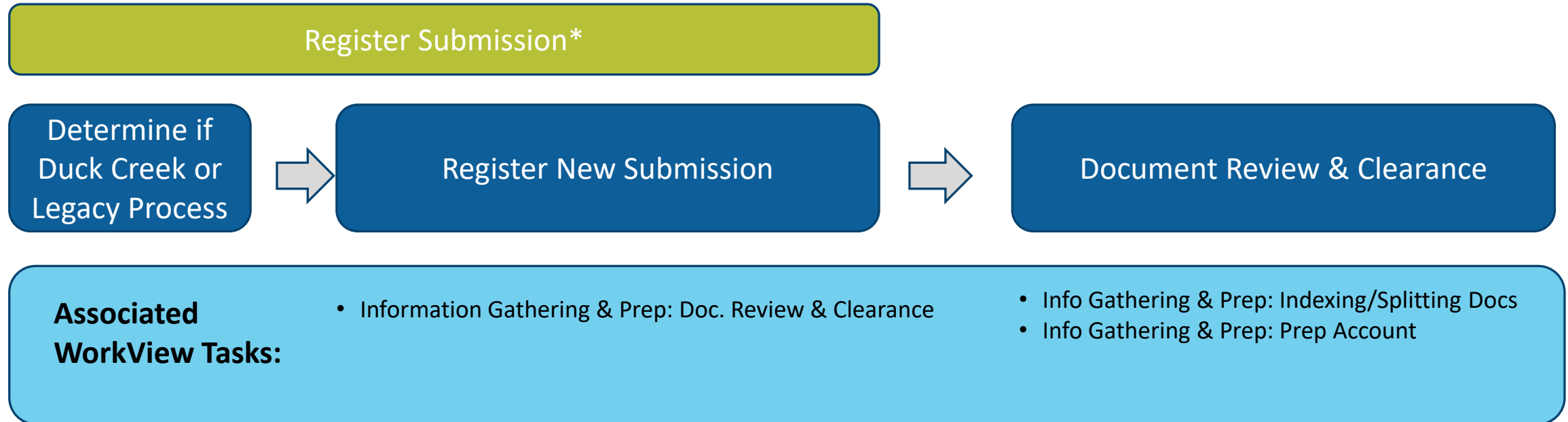
The SLA for the Business Center to complete the Document Review and Clearance process and index/split documents is 2 hours.

True or **False**

The SLA to complete the Document Review and Clearance process is 2 hours, but the SLA for indexing/splitting documents is 24 hours.

The Business Center's Fleet Process

Business Center Fleet New Business Process



NOTE: *After Duck Creek Agent Go-Live date, the register submission process will be the Agent's process and not a Business Center responsibility.

What's Next...

- Repeat this video training, as needed
- Watch any additional videos or attend live or virtual training, as directed



