

Register Submission

Determine if Duck Creek or Legacy Process

1. Receive submission in fleet@company.com
2. Check the Fleet log to see if there is prior entry
3. If the submission is marked as incomplete for the same agency in the Fleet log, search for submission in Duck Creek and upload new documents and register submission process is complete
4. Was the submission in log and cleared for another agency?
 - a) If yes, then determine if it was cleared in Duck Creek (Column T in log) and if it was, start a new submission in Duck Creek
 - b) If it was not cleared in Duck Creek, follow the legacy process
5. If **no**, then log it to the Fleet Log and identify if the submission should go in Duck Creek:
 - a) If Duck Creek, then forward to processingfleet@company.com
 - b) If not Duck Creek, follow the legacy process
6. If **yes**, check to see if cleared in Duck Creek (column T in Fleet Log):
 - a) If yes, forward the submission to processingfleet@company.com with email message that the submission should be manually rejected
 - b) If no, follow the legacy process

Register New Submission

1. Receive submission in processingfleet@company.com mailbox
2. In Duck Creek, click New Submission
3. Select the appropriate Agency
4. Select the Licensed Producer
If Agent does not have authority, notify the agent
5. Select New Business for the Submission Type
6. Enter either the DOT Number or the Motor Carrier Number - the other field will populate based on your entry
7. Verify the Mailing Address

If there is a mailing address and a physical address, you must verify both

8. Select the Effective Date
9. Select either Commercial Auto Primary Liability or Non-Trucking Liability
10. Select all lines to be quoted, based on the application

If both Commercial Auto Primary Liability AND Non-Trucking Liability are needed, you must complete two separate submissions

11. Select More than 10 for the number of power units
12. Click Confirm Selection
13. Click the Upload New Documents link
14. Select the appropriate Attachment Type from the dropdown list
15. Click the Attach button
16. Select the file to attach in the dialog box and click Open
17. Verify the Document Name and Attachment Type display and are correct
18. Repeat steps 14 - 17 for each document
19. When all files are attached, click Submit
20. Enter the Year the Business Started
21. Change the Date Quote Needed to that given in the email or to 15 days prior to the effective date
22. Click Documentation Upload Complete
23. Click Yes to confirm

Look at the Status for each line of business selected:

- If status is Pending Clearance, then an automated task was generated, and you are done with the New Submission process
- If the status shows as Not Cleared, follow the process below to notify the Agent of not cleared lines

Notify Agent

1. From the **Fleet Mailbox**, notify the agent that their submission is not cleared using the appropriate template - the templates are setup as signatures in Outlook
2. Save the sent email
3. Select Correspondence as the Attachment Type
4. Click the Attach button
5. Select the email file to attach in the dialog box and click Open
6. Verify the Document Name and Attachment Type display and are correct
7. Click the Submit button

Register New Submission in Duck Creek (Existing Submission)

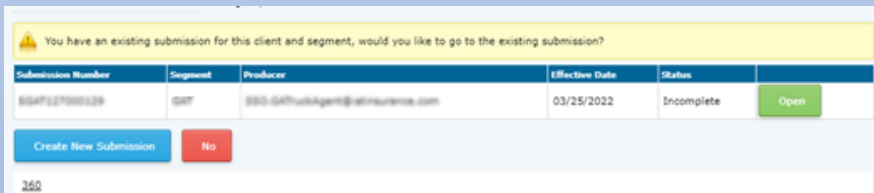
This process is used when there is an existing submission in Duck Creek which could happen when an Agent resends a submission due to an incomplete submission being received the first time

Notice the process through step ___ is the same as the Register New Submission process shown on the previous page

1. Receive submission in processingfleet@company.com mailbox
2. In Duck Creek, click New Submission
3. Select the appropriate Agency
4. Select the Licensed Producer
5. Select New Business for the Submission Type
6. Enter either the DOT Number or the Motor Carrier Number - the other field will populate based on your entry
7. Verify the Mailing Address

If there is a mailing address and a physical address, you must verify both

9. You will see a message display: You have an existing submission for this client and segment, would you like to go to the existing submission?
10. Click the Open button



All the selected lines will display as Incomplete



Please select lines you wish to quote:		Status
Commercial Auto Primary Liability	<input checked="" type="checkbox"/> Override	Incomplete
Non-Trucking Liability	<input type="checkbox"/> Override	Not Selected
Commercial Auto Physical Damage	<input checked="" type="checkbox"/> Override	Incomplete
Motor Truck Cargo	<input checked="" type="checkbox"/> Override	Incomplete
General Liability	<input checked="" type="checkbox"/> Override	Incomplete

11. Click the Upload New Documents link
12. Select the appropriate Attachment Type from the dropdown list
13. Click the Attach button
14. Select the file to attach in the dialog box and click Open
15. Verify the Document Name and Attachment Type display and are correct
16. Repeat steps 12 - 15 for each document
17. When all files are attached, click Submit
18. Verify the year the business
19. Click Documentation Upload Complete
20. Click Yes to confirm

Look at the Status for each line of business selected:

- If status is Pending Clearance, then an automated task was generated, and you are done with the New Submission process
- If the status shows as Not Cleared, follow the process for notifying the Agent of not cleared lines on the previous page

Document Review & Clearance

1. In WorkView, under Business Center, click the Clearance Fleet filter
2. Double click to open the task
3. Click the Open Object icon (next to Case ID) 
4. Click Link to Duck Creek
5. Click View Submission Documents
6. Click the caret(s) to expand the row(s) and see the documents 

Double-click to view any of the documents

7. Verify that the following documents are included:
 - New Application (all pages included, Coverages, Commodities, Power Units, must be Fleet Application)
 - Drivers List (must include DOB, State, Years of Experience, License Number, Date of Hire)
 - Vehicles List (Verify VIN included)
 - Loss Runs (4 years history and must be within 90 days from the submission date)
 - Most Recent 4 Quarter IFTA's
8. Close the OnBase window
9. Follow the appropriate steps for the following situations:
 - Documentation is Complete
 - Documentation is Complete but Agent Advised to Decline
 - Documentation is Incomplete

If Documentation is Complete

1. In Duck Creek, click the Approve button
2. Click Yes to approve the submission
3. Notice the Status for each selected line now displays as Cleared
4. Use the appropriate template to send an email from the Fleet mailbox to the Agent

When you click Approve, Duck Creek is doing a check to make sure the submission is still available to be cleared. If someone else got in another submission before you, the system won't clear your submission.

5. Use the appropriate template in Outlook to send an email from the Fleet mailbox to the Agent
6. Save the email you sent and then click Upload New Documents
7. Select Correspondence as the Attachment Type

8. Click the Attach button
9. Select the desired file to attach in the dialog box and click Open
10. Verify the Document Name and Attachment Type display and are correct
11. Click the Submit button
12. In the task in WorkView, click the dropdown for Outcome/Reason:
 - If documents need re-indexing/splitting, select Final – Clear Only – Large or Med Fleet
 - If documents do not need re-indexing/splitting, select Final - Clear & Indexed – Large or Med Fleet
13. Click Save and Close

Med Fleet is 11 – 19 power units, Large Fleet is 20 or more

WorkView creates a new task, based on the Outcome/Reason:

- Prep Account (for the assigned Account Manager)
- Indexing / Splitting Docs Task (for Policy Support Specialist)

If Documentation is Complete but You were Advised to Decline

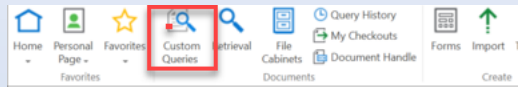
1. Click the Decline to Quote button
2. Click Yes to confirm
3. The submission status is now Declined
4. From the Fleet Mailbox, notify the agent using the appropriate template
5. Follow steps 6 – 11 above to upload the email
6. In the task in WorkView, click the dropdown for Outcome/Reason
7. Select Final – Submission Declined
8. Click Save and Close

If Documentation is Incomplete

1. Click the Submission Incomplete button
2. Click Yes to confirm
3. The submission status is now Incomplete
4. From the Fleet Mailbox, notify the agent using the appropriate template
5. Save the email you sent and then click Upload New Documents
6. Follow steps 7 – 11 above to upload the email
7. In the task in WorkView, click the dropdown for Outcome/Reason
8. Select Final – Documentation Incomplete
9. Click Save and Close

Split and Re-Index Documents

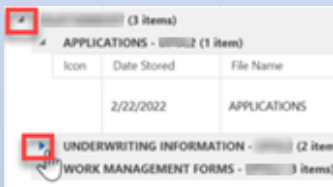
1. The WorkView Task will appear in the Indexing filter for Business Center
2. Double-click to open the task
3. In the task, select and copy the submission number
4. Minimize the task window
5. From the main WorkView window, click Custom Queries on the toolbar



6. Click Duck Creek Policy Client Documents (the icon looks like a notepad)

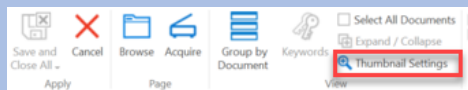


7. Paste the Submission Number
8. Click the Search button
9. Click the carets to see the documents

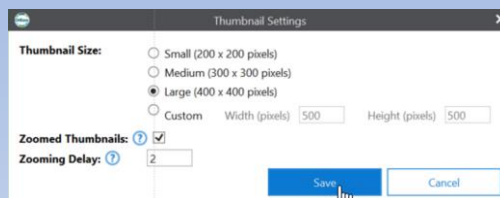


You can ignore the External Reports and Work Management Forms, these are automatically uploaded and are not the submission documents

10. Double-click the application to view the content, a new window displays, you can see the entire document
11. Review the document to see if it needs to be split into additional documents
12. When you are ready to split the document, click Send To on the toolbar and select Document Separation
13. Click Thumbnail Settings on the toolbar



14. To see larger thumbnails, select Large (400 x 400 pixels) and click Save

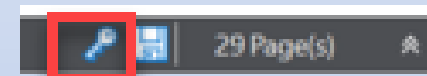


- If you hover your mouse over a page, the page will display larger
- To open a specific page, double-click the page and it will open in a separate window
- To see more pages at once, drag the border of the view area down

15. Once you've determined which pages need to go into a separate document, select those pages

To select a series of pages: click the first page, hold down the Shift key, click to select the last page (use the scroll bar as needed)

16. Click, drag and drop the selected pages to the bottom of the screen
17. Click the Keyword icon for the new document



18. Click the dropdown for Document Type and select the appropriate type
19. Type in an appropriate File Name
20. Delete the Document Type and use the dropdown to select the same Document Type as above

The Document Type must be same in both Document Type fields

21. Scroll down and verify that the Client ID is populated
22. Click Save and Remove
23. Repeat the steps to split out additional documents
24. If any pages need to be rotated, click to select the page and click Rotate Left or Rotate Right on the toolbar
25. When you finish splitting and re-indexing, click Save and Close All
26. Return to the task and click the Outcome/Reason dropdown
27. Select Final - Assign Prep Account Task
28. Click Save and Close

You can split out each group of pages and then re-index each, instead of doing them one at a time