



Policy Spot: 24/7 Automated Service Department

Manage online service request submission, tracking, and policy documentation.

Submit Service Requests Online using a form specific to the carrier and line of business of the policy. They're programatically assigned to a CSR for handling through a standard rotation, or based on the nature of the request.

Integrated Work Queues with integrated calendaring functionality for each CSR automate the completion of service requests and ensures that the requestor is kept up to date.

Public and Private Notes are available within each request, allowing the CSR to update the requesting agent while simultaneously making internal notes.

Document All Communications with the insured and/or producer over the life of a policy, whether it's a phone call, email, or document.

| ATTACHMENTS/FETCH DOCUMENTS | | | | | | | | |
|-----------------------------|--------|---------------|---------------|----------------|---------------|--------------------------|--|------------------------|
| Source | Req Id | Updated On | Updated By | Document Type | Desc/Eff Date | File Name | Note | Delete |
| Manual | 357701 | 12/09/2016... | Stephen Combs | Renewals | 2017-2018 | winde.pdf | The renewal has been attached. Thank you! | Delete |
| Fetch | 193413 | 12/05/2016 | cpergande | Verify Renewal | | | Associated service request was closed or completed | |
| Fetch | 176084 | 11/02/2016 | beberle | Renewal | 11/02/2016 | 176084_FetchDocument.pdf | | |

SERVICE REQUESTS [New Service Request](#)

2 items found, displaying 1 to 2

| Sv Req Id | Request Type | Description | Submit Date | Effective Date | Email Service |
|-----------|---------------|------------------------------|-------------|----------------|--------------------------------|
| 384781 | Phone Call | VERIFY REASON FOR RENEWAL... | 01/17/17 | 01/17/17 | Click to email |
| 357701 | Other Request | Verify Renewal | 12/05/16 | 01/19/17 | Click to email |