

Exp Date	Client Code	Client Name	Svc Tier	Policy	Policy #	Status	Renewal Stage	SSR Stage	Bill	PPE	ICO	1st Prod	Est Premium	Comm %	Est Comm
12/29/2019	BU			HO3		REN	6 - Renewed	Issued	D	FEDNA1	FEDNA1	CLEWA1	2,434.00	10.00%	243.40
1/22/2020	HC			HO3		NEW	6 - Renewed	Issued	D	UNIPR1	UNIPR1	BANLO2	290.00	12.00%	34.80
1/25/2020	CO			BOP		NEW	1 - Waiting to Start Renewal P	Submitted	D	AMGUA1	AMGUA1	CLEWA1	Please Enter	15.00%	Please Enter
1/31/2020	KO		Level A	HO3		REN	6 - Renewed	Issued	A	WORLAC-0	LLOOF1	BANLO2	6,528.71	10.00%	652.87
2/15/2020	BU			HO3		NEW	6 - Renewed	Issued	D	EDISO1	EDISO1	BANLO2	1,832.49	10.00%	183.25
2/15/2020	HC		Level B	HO3		NEW	6 - Renewed	Issued	D	SECF1	SECF1	BANLO2	2,215.00	10.00%	221.50
9/29/2020	KN			PFLD		NEW	6 - Renewed	Issued	D	HARFL1	HARFL1	BANLO2	516.00	20.00%	103.20
1/12/2021	FLE		Level A	HO3		NEW	1 - Waiting to Start Renewal P	Issued	D	UNIPR2	UNIPR2	CLEWA1	Please Enter	12.00%	Please Enter
8/6/2021	HC			PFLD		REN	6 - Renewed	Issued	D	WRIFL1	WRIFL1	CLEWA1	306.00	20.00%	61.20
1/1/2022	SCI			AUTO		REN	1 - Waiting to Start Renewal P	Issued	D	SCHIN1	MERIN1	CLEWA1	873.00	10.00%	87.30
3/8/2022	LAI		Level A	AUTO		REN	1 - Waiting to Start Renewal P	Issued	D	PROGR1	PROGR1	CLEWA1	1,467.00	10.00%	145.40
3/11/2022	KEI			HO6		REN	1 - Waiting to Start Renewal P	Issued	D	MACGR1	SPIIN1	BANLO2	1,833.00	10.00%	183.30
3/14/2022	MA			HO6		REN	1 - Waiting to Start Renewal P	Issued	D	MACGR1	SPIIN1	BANLO2	857.50	10.00%	85.75
3/24/2022	JAN			HO6		NEW	1 - Waiting to Start Renewal P	Issued	D	ALLST1	ALLST1	BANLO2	2,285.35	15.00%	342.80
3/25/2022	FLC			PFLD		REN	1 - Waiting to Start Renewal P	Issued	D	WRIFL1	WRIFL1	CLEWA1	572.00	20.00%	114.40
3/25/2022	LIP			AUTO		REN	1 - Waiting to Start Renewal P	Issued	D	PROGR1	PROGR1	CLEWA1	1,078.00	10.00%	107.80
3/26/2022	LEC		Level A	HO3		REN	1 - Waiting to Start Renewal P	Issued	D	UNIPR2	UNIPR2	CLEWA1	9,936.00	12.00%	1,192.32
3/30/2022	IAN			PFLD		REN	1 - Waiting to Start Renewal P	Issued	D	WRIFL1	WRIFL1	CLEWA1	572.00	20.00%	114.40
3/30/2022	AFI			PROP		NEW	1 - Waiting to Start Renewal P	Issued	D	NATIO1	ALLIN1	CLEWA1	1,246.00	10.00%	124.60
3/30/2022	PIC		Level B	PL		REN	1 - Waiting to Start Renewal P	Issued	A	CRCBOCO-0	ADMIN1	CLEWA1	11,363.00	10.00%	1,136.30
3/31/2022	LAI			PFLD		REN	1 - Waiting to Start Renewal P	Issued	D	WRIFL1	WRIFL1	CLEWA1	523.00	20.00%	104.60
4/1/2022	MA		Level A	MGMX		NEW	1 - Waiting to Start Renewal P	Issued	A	CRCBOCO-0	NATFI1	CLEWA1	46,500.00	10.00%	4,650.00
4/1/2022	HC			HO3		REN	1 - Waiting to Start Renewal P	Issued	D	UNIPR1	UNIPR1	CLEWA1	3,156.00	12.00%	378.72
4/1/2022	MA		Level A	CYBR		REN	1 - Waiting to Start Renewal P	Issued	A	CRCBOCO-0	HOUCA1	CLEWA1	12,877.00	10.00%	1,287.70
4/1/2022	MA		Level A	A&MX		NEW	1 - Waiting to Start Renewal P	Issued	A	CRCBOCO-0	LLOOF1	CLEWA1	45,000.00	10.00%	4,500.00
4/1/2022	RO			BRSK		NEW	1 - Waiting to Start Renewal P	Issued	A	CRCBOCO-0	SAFSP1	CLEWA1	6,440.00	10.00%	644.00

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1/22/2020	HC			HO3		NEW	6 - Renewed	Issued	D	UNIPR1	UNIPR1	BANLO2	290.00	12.00%	34.80
1/25/2020	CO			BOP		NEW	1 - Waiting to Start Renewal P	Submitted	D	AMGUA1	AMGUA1	CLEWA1	Please Enter	15.00%	Please Enter
1/31/2020	KO		Level A	HO3		REN	6 - Renewed	Issued	A	WORLFA0	LLOOF1	BANLO2	6,528.71	10.00%	652.87
2/15/2020	BU			HO3		NEW	6 - Renewed	Issued	D	EDISO1	EDISO1	BANLO2	1,832.49	10.00%	183.25
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9/29/2020	KN			PFLD		NEW	6 - Renewed	Issued	D	HARFL1	HARFL1	BANLO2	516.00	20.00%	103.20
1/12/2021	FL		Level A	HO3		NEW	1 - Waiting to Start Renewal P	Issued	D	UNIPR2	UNIPR2	CLEWA1	Please Enter	12.00%	Please Enter
8/6/2021	HC			PFLD		REN	6 - Renewed	Issued	D	WRIFL1	WRIFL1	CLEWA1	306.00	20.00%	61.20
1/1/2022	SC			AUTO		REN	1 - Waiting to Start Renewal P	Issued	D	SCHIN1	MERIN1	CLEWA1	873.00	10.00%	87.30
3/8/2022	LA		Level A	AUTO		REN	1 - Waiting to Start Renewal P	Issued	D	PROGR1	PROGR1	CLEWA1	1,467.00	10.00%	145.40
3/11/2022	KE			HO6		REN	1 - Waiting to Start Renewal P	Issued	D	MACGR1	SPIIN1	BANLO2	1,833.00	10.00%	183.30
3/14/2022	MA			HO6		REN	1 - Waiting to Start Renewal P	Issued	D	MACGR1	SPIIN1	BANLO2	857.50	10.00%	85.75
3/24/2022	JA			HO6		NEW	1 - Waiting to Start Renewal P	Issued	D	ALLST1	ALLST1	BANLO2	2,285.35	15.00%	342.80
3/25/2022	FL			PFLD		REN	1 - Waiting to Start Renewal P	Issued	D	WRIFL1	WRIFL1	CLEWA1	572.00	20.00%	114.40
3/25/2022	LIP			AUTO		REN	1 - Waiting to Start Renewal P	Issued	D	PROGR1	PROGR1	CLEWA1	1,078.00	10.00%	107.80
3/26/2022	LE		Level A	HO3		REN	1 - Waiting to Start Renewal P	Issued	D	UNIPR2	UNIPR2	CLEWA1	9,936.00	12.00%	1,192.32
3/30/2022	IAN			PFLD		REN	1 - Waiting to Start Renewal P	Issued	D	WRIFL1	WRIFL1	CLEWA1	572.00	20.00%	114.40
3/30/2022	AF			PROP		NEW	1 - Waiting to Start Renewal P	Issued	D	NATIO1	ALLIN1	CLEWA1	1,246.00	10.00%	124.60
3/30/2022	PIC					REN	1 - Waiting to Start Renewal P	Issued	A	CRCBOCO-0	ADMIN1	CLEWA1	11,363.00	10.00%	1,136.30
3/31/2022	LA					REN	1 - Waiting to Start Renewal P	Issued	D	WRIFL1	WRIFL1	CLEWA1	523.00	20.00%	104.60
4/1/2022	MA					NEW	1 - Waiting to Start Renewal P	Issued	D	CRCBOCO-0	NATFI1	CLEWA1			0.00
						REN			D	UNIPR1	UNIPR1	CLEWA1			8.72
						REN			D	CRCBOCO-0	HOUCA1	CLEWA1			7.70
						NEW			D	CRCBOCO-0	LLOOF1	CLEWA1			0.00
						NEW			D	CRCBOCO-0	SAFSP1	CLEWA1			4.00

Red = Past Expiration  
Orange = Expiring within 7 days

This column is from one Agency Defined Category (ADC).  
There is a trick to adding ADC's into a report like this without having it duplicate the policy once for every ADC the client has, but it can be done.

This column is here as a bit of a reminder for the user to take advantage of the Renewals Manager Epic

Red = In Process (Bad for any already effective Policy. Plus it interferes with Renewals Manager)  
Orange = Submitted (Not Bad, just informational)

Red = Zero or Blank  
Sample agency uses these fields as "Primary" for Book of Business Reporting.

Criteria

Select Columns

Criteria	Selection	From
Region	All	ExpirationReport.Policy
Agency	All	ExpirationReport.Policy
Branch	All	ExpirationReport.Policy
Department	All	ExpirationReport.Policy
Profit Center	All	ExpirationReport.Line
Account Lookup Code	All	ExpirationReport.Policy
Client Type	Both	ExpirationReport.Client
Policy Type	All	ExpirationReport.Policy
Line Type	All	ExpirationReport.Line
Line Bill Mode	Both	ExpirationReport.Line
Line Expiration Date	Open months through +2 months	ExpirationReport.Line
Issuing Company	All	ExpirationReport.Line
Line Premium Payable Company	All	ExpirationReport.Line

Include selections  Exclude selections

All dates

Blanks only

Fixed date range

From  Through

Relative date range

From system date  Open  Months  Through end of system date   Months

" +0" is equal to today, or today's month

Sample Results Based on Date Selections

If run today, report will include items from OPEN through 5/31/2022

If run 1 month from today, report will include items from OPEN through 6/30/2022

Criteria

Criteria	Selection	From
Region	All	ExpirationReport.Policy
Agency	All	ExpirationReport.Policy
Branch	All	ExpirationReport.Policy
Department	All	ExpirationReport.Policy
Profit Center	All	ExpirationReport.Line
Account Lookup Code	All	ExpirationReport.Policy
Client Type	Both	ExpirationReport.Client
Policy Type	All	ExpirationReport.Policy
Line Type	All	ExpirationReport.Line
Line Bill Mode	Both	ExpirationReport.Line
Line Expiration Date	Open months through +2 months	ExpirationReport.Line
Issuing Company	All	ExpirationReport.Line
Line Premium Payable Company	All	ExpirationReport.Line
Line Premium Payable Broker	All	ExpirationReport.Line
Line Producer	All	ExpirationReport.Line
Line Commissionable Broker	All	ExpirationReport.Line
Line Status	Selected	ExpirationReport.Line
Account Status	Both	ExpirationReport.Client
Prospective/Contracted	Both	ExpirationReport.Policy
Lines per Policy	One line per policy	ExpirationReport
Policies	All policies	ExpirationReport
Account Agency Defined Options	All	ExpirationReport.Client
Renewed Policies	Exclude renewed expired policies	ExpirationReport
Parameter Page	Include parameter page	ParameterPage
Service Summary Stage	All	ExpirationReport.Line.Services
Line Effective Date	All	ExpirationReport.Line
Policy Expiration Date	All	ExpirationReport.Policy
Service Summary Action	Selected	ExpirationReport.Line.Services

This report is intended to be provided to Service team members based on Service Role assignment via Quickview.

Usually, quickview expirations reports are not used as the main / mandatory expiration list, but is instead a courtesy to the user so that they can quickly pull it up whenever they want. A bit of a "security blanket".

The "Relative Date Range" combined with the ability to add color coding to the report layout allows the agency to combine what used to be 2 different reports into a single quickview. Prior to the inclusion of this date range option, the "Missed Expirations" (Policies not renewed or cancelled but with expiration dates in the past) would require a report separate from upcoming expirations.

Variations on this report layout with different color coded fields are frequently built for Quality Assurance purposes.