

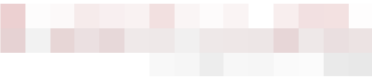
# PL Primary Policy, Email & Service Tier Report

This Expiration Report variant is intended for Quality Assurance.

It evaluates the fields this agency required in order for their Epic report generated email touch points to function properly.

It shows only a single row per Epic account. Areas that require attention are color coded in red or blue.

This report is intended to be added to the servicers Home Base Quick View.



Client Code	Primary Contact - Primary	Est Premium	Service Tier	Tier by Est Prem	Primary Policy Result
F	Primary Contact Email Found		B Level Account		Primary Policy Assigned
F	Primary Contact Email Found		A Level Account	B Level Account	Primary Policy Assigned
F	Primary Contact Email Found		D Level Account		Primary Policy Assigned
F	Primary Contact Email Found		C Level Account		Primary Policy Assigned
F	Primary Contact Email Found		B Level Account		Primary Policy Assigned
F	Primary Contact Email Found		D Level Account	C Level Account	More than 1 Line as Primary Found
F	Primary Contact Email Found		D Level Account		Primary Policy Assigned
F	Primary Contact Email Found		C Level Account	D Level Account	Primary Policy Assigned
F	Primary Contact Email Found		B Level Account		Primary Policy Assigned
F	Primary Contact Email Found		D Level Account	C Level Account	Primary Policy Assigned
F	Primary Contact Email Found		D Level Account		Primary Policy Assigned
F	Primary Contact Email Found		D Level Account	C Level Account	Primary Policy Assigned
F	Primary Contact Email Found		D Level Account	B Level Account	Primary Policy Assigned
F	Primary Contact Email Found		D Level Account		Primary Policy Assigned
S	Primary Contact Email Found		D Level Account		Primary Policy Assigned
S	Primary Contact Email Found		C Level Account		Primary Policy Assigned
S	Primary Contact Email Found		D Level Account		Primary Policy Assigned
S	Primary Contact Email Found		A Level Account		Primary Policy Assigned
S	Primary Contact Email Found		B Level Account		No Primary Policy Found
V	Primary Contact Email Found		D Level Account		Primary Policy Assigned

This agency sends emails to the Primary Contact. So the report verifies that the primary contact has an email address entered.

Note that while this agency was using the Primary Contact, Epic can direct marketing report output to contacts other than the Primary via the Contact Classification field.

This agency tracks Service Tiers at the Account Level via Agency Defined Category

Automated touch points vary by the Service Tier assignment, so the report will identify accounts without a service tier assigned with a red "Missing".

Service Tiers are determined by the accounts total est premium (except for their "OA - Override Tier to A level service")

If the total est premium sum doesn't match with the assigned tier, the report displays the recommended

Many automated touch points should occur only once per year; a problem when a client may have multiple policies with different terms.

This agency uses a Line Level Agency Defined Category of "Primary Policy". The rule is that every account has 1, and only 1, line 'tagged' as being primary by assigning the ADC to it.

The report shows any account that lacks this ADC on at least 1 line in red, and any account with more than 1 line is displayed in blue.