

Policy Overview Report

Client Name	Tier	CSR24	Policy Term	Policy	Status	Bill	Renewal Stage	SSR Stage	Policy #	1st Pr	Pr %	Pr \$	ICO	PPE	Est Prem	Comm %	Est Comm
Jo			1/1/2022 - 1/1/2023	MGAP	REN	D	New Policy	Issued			0.00@	0.00	REGBC1	REGBC1	Please Enter	0.00%	Please Enter
Jo			1/1/2022 - 1/1/2023	MGAP	REN	D	New Policy	Issued			0.00@	0.00	REGBC1	REGBC1	Please Enter	0.00%	Please Enter
Jo			1/1/2022 - 1/1/2023	MDRX	REN	D	New Policy	Issued			0.00@	0.00	HUMAN1	HUMAN1	Please Enter	0.00%	Please Enter
Jo			1/1/2022 - 1/1/2023	MDRX	REN	D	New Policy	Issued			0.00@	0.00	HUMAN1	HUMAN1	Please Enter	0.00%	Please Enter
M			1/1/2022 - 1/1/2023	MEDI	REN	D	New Policy	Issued			0.00@	0.00	UNITED	UNITED	Please Enter	0.00%	Please Enter
D'			6/24/2021 - 6/24/2022	HOME	RRW	D	New Policy	Issued			0.00@	0.00	SAFIN1	SAFIN1	532.00	0.00%	Please Enter
D'			6/24/2021 - 6/24/2022	AUTO	RRW	D	New Policy	Issued			0.00@	0.00	SAFIN1	SAFIN1	1,447.50	0.00%	Please Enter
Ge			10/21/2021 - 10/21/2022	FLOD	REN	D	New Policy	Issued			28.00	0.00	HARIN1	HARIN1	621.00	0.00%	Please Enter
Ge			5/11/2021 - 5/11/2022	FLOD	NEW	D	New Policy	In Process			40.00	0.00	SUPERI	SUPERI	531.00	18.00%	Please Enter
Ge			5/11/2021 - 5/11/2022	FLOD	NEW	D	New Policy	In Process			40.00	0.00	SUPERI	SUPERI	531.00	0.00%	77.00
Ge			5/11/2021 - 5/11/2022	FLOD	NEW	D	New Policy	In Process			40.00	212.40	SUPERI	SUPERI	77.00	0.00%	Please Enter
Ge			5/11/2021 - 5/11/2022	FLOD	NEW	D	New Policy	In Process			40.00	0.00	SUPERI	SUPERI	77.00	18.00%	Please Enter
Ge			7/21/2021 - 7/21/2022	FLOD	RRW	D	New Policy	Issued			28.00	0.00	SUPERI	SUPERI	1,156.00	0.00%	254.32
Gr			2/28/2022 - 2/28/2023	FLOD	NEW	D	New Policy	Issued			40.00	0.00	HARIN1	HARIN1	2,592.00	0.00%	427.90
Gr			2/28/2022 - 2/28/2023	FLOD	NEW	D	New Policy	Issued			40.00	0.00	HARIN1	HARIN1	1,954.00	0.00%	309.32
Gr			2/28/2022 - 2/28/2023	FLOD	NEW	D	New Policy	Issued			40.00	0.00	HARIN1	HARIN1	731.00	0.00%	81.00
Gr			2/28/2022 - 2/28/2023	FLOD	NEW	D	New Policy	Issued			40.00	0.00	HARIN1	HARIN1	592.00	0.00%	55.00
M	Level C		9/20/2021 - 9/20/2022	FLOD	REN	D	New Policy	Issued			28.00	0.00	SUPERI	SUPERI	505.00	18.00%	90.90
H2			2/25/2022 - 2/25/2023	FLOD	NEW	D	New Policy	In Process			40.00	0.00	SUPERI	SUPERI	696.00	21.32%	148.39
Ki			10/12/2021 - 10/12/2022	HOME	REN	D	New Policy	Issued			28.00	28.43	SAFIN1	SAFIN1	677.00	15.00%	101.55
Lir	Level A		1/1/2022 - 1/1/2023	MDRX	REN	D	New Policy	Issued			0.00@	0.00	HUMAN1	HUMAN1	123.92	0.00%	40.90
Lir	Level A		1/1/2022 - 1/1/2023	MDRX	REN	D	New Policy	Issued			0.00@	0.00	HUMAN1	HUMAN1	123.92	0.00%	40.90
Ki	Level B		6/15/2021 - 6/15/2022	HOME	NAR	D	New Policy	Issued			28.00	15.79	SAFIN1	SAFIN1	376.00	0.00%	Please Enter
Hc			3/31/2021 - 3/31/2022	CFLO	REN	D	New Policy	Issued			28.00	0.00	NATFL1	NATFL1	26,675.00	0.00%	1,533.75
Hc			7/2/2021 - 7/2/2022	FLOD	REN	D	New Policy	Issued			28.00	0.00	HARIN1	HARIN1	2,229.00	0.00%	Please Enter
Hc			7/2/2021 - 7/2/2022	FLOD	REN	D	New Policy	Issued			28.00	0.00	HARIN1	HARIN1	692.00	18.50%	128.02
Hc								Issued			28.00	0.00	HARIN1	HARIN1	2,248.00	0.00%	Please Enter
Hc								Issued			28.00	0.00	HARIN1	HARIN1	2,229.00	0.00%	Please Enter
Hc								Issued			28.00	0.00	HARIN1	HARIN1	2,229.00	18.50%	412.37
Hc								Issued			28.00	0.00	HARIN1	HARIN1	2,248.00	18.50%	415.88
Hc								Issued			28.00	0.00	HARIN1	HARIN1	923.00	18.50%	170.76

This client sample illustrates that special conditional formatting can include highlighting the data field in a specific color. A variant on the more traditional font color coding. (We never considered trying conditional highlighting in an Epic report layout before this client requested it.)