Travelers PL Electronic Policy View
Daily Activity Report updates

Updated March 12, 2012
Travelers continues to look for ways to make it easier for our Independent Agents to do business with us. From Agent HQ\textsuperscript{SM} to our quoting and issuing systems, we are committed to building an infrastructure that helps agencies increase efficiencies and grow more profitably in the long term. The PL Electronic Policy View (EPV) Daily Activity report is one of the many tools we offer to improve your productivity and profitability.

The EPV Daily Activity report is a listing of daily business activity by producer code that includes insured name, policy number and date of transaction.

Effective February 12, 2012, we implemented several enhancements to this report. The next few pages list the enhancements, explain how to access the report, search for specific dates and export a report into a spreadsheet. Frequently asked questions are listed at the end of this document.
February 12, 2012 enhancements to EPV Daily Activity report:

- You can now search for a report for one date or a range of dates.
- Transactions for multiple producer codes can now be accessed on one report.
- The insured’s copy of the policy document can be viewed directly from the report. **Note:** Effective March 12, the agent’s copy will also be available for viewing.
- The information in the report can now be exported into an Excel spreadsheet.
Accessing the Report

The EPV Daily Activity report is available under Reports & Alerts on the right side of the Agent HQ home page. You can also access this report under Tools & Information on the left. Expand Reports & Alerts by clicking “+”; the EPV Daily Activity report will display in a list below.
Selecting a Date

You can access a report for one date or select a date range. To access a report for one date, select **Equals** in the **Policy Process Date** field.

To enter a date, click the calendar icon or the blank field to the right of **Policy Process Date**. Enter the date in the blank field, or click a date on the calendar. To select the current date, click **Today**.
Selecting a Range of Dates

To access a report for a range of dates, select **Date Range**. Enter the beginning date in the blank field to the right or click the first calendar icon and select it. Click the second calendar icon or next blank field to select the end date. The date range must be within 31 days.

To change the month or year, click the single arrow at the top of the calendar to change the month or click the double arrows to change the year. You can also click the month and year at the top of the calendar to change your selection.

When you have completed selecting your dates, click **Search**.

To clear entered dates, click **Reset**.
Viewing the Report

The EPV Daily Activity report displays each agent code associated with your Agent HQ ID that has policies available.

To display or close all records for the agent codes listed on the report, click Expand All or Collapse All. To display all records for a specific code, click the arrow to the left of the agent code.

Note: Massachusetts auto policies now display on the EPV Daily Activity report; the fields for Named Insured, Full Term Premium and Transaction Premium will be blank.
**Viewing Policy Documents**

The Transaction Type column indicates if the document is the insured or agent copy. Each document displays on a separate row.

The insured copy will display 1-3 days after the agent copy.

<table>
<thead>
<tr>
<th>Policy</th>
<th>Named Insured</th>
<th>Policy Number</th>
<th>Transaction Type</th>
<th>Policy Eff-Date</th>
<th>Transaction Eff-Date</th>
<th>Process Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Agent Code: 0X0001 (CITY INSURANCE AGENCY)</strong> - 1 records</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>PAM POLICYHOLDER</td>
<td>0987654321-101-1</td>
<td>Renewal - Agent</td>
<td>05/04/2012</td>
<td>05/04/2012</td>
<td>03/05/2012</td>
</tr>
<tr>
<td></td>
<td><strong>Agent Code: 0Z0002 (COUNTY INSURANCE AGENCY)</strong> - 3 records</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>CHARLES &amp; CATHY CUSTOMER</td>
<td>0999887777-101-1</td>
<td>Renewal - Agent</td>
<td>05/04/2012</td>
<td>05/24/2012</td>
<td>03/05/2012</td>
</tr>
<tr>
<td></td>
<td>GEORGE &amp; HELEN INSURED</td>
<td>0995553331-633-1</td>
<td>New Policy - Insured</td>
<td>05/04/2012</td>
<td>05/24/2012</td>
<td>03/05/2012</td>
</tr>
<tr>
<td></td>
<td>GEORGE &amp; HELEN INSURED</td>
<td>0995553331-633-1</td>
<td>New Policy - Agent</td>
<td>05/04/2012</td>
<td>05/24/2012</td>
<td>03/06/2012</td>
</tr>
<tr>
<td></td>
<td><strong>Agent Code: 0Q0005 (STATE INSURANCE GROUP)</strong> - 1 records</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>HARRIS HOMEOWNER</td>
<td>0987776654-633-1</td>
<td>Renewal - Insured</td>
<td>05/04/2012</td>
<td>05/24/2012</td>
<td>03/06/2012</td>
</tr>
</tbody>
</table>
Viewing a Policy Document

To view a copy of the policy document from the report, click the PDF icon next to the insured’s name. You can print the document or save it to your computer.

Note: The Transaction Description column is not displayed on the updated EPV Daily Activity report. A description of the transaction can be found on the insured’s policy document.
Exporting the Report to an Excel Spreadsheet

To export the information in the report to an Excel spreadsheet, select **Export to Excel**. All data will be exported whether the display is expanded or collapsed. You can sort and filter the information in the spreadsheet and save it to your computer.

### PL EPV Daily Activity

**Policy Process Date:** 01/02/2012 to 01/06/2012

*Please note, the date range search allows only up to a 31 day time span.*

**Search Results (Policy Process From Dates: 01/02/2012 to 01/06/2012)**

<table>
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<tr>
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<tr>
<td>Agent Code: 0X0001 (CITY INSURANCE AGENCY)</td>
<td>PAM POLICYHOLDER</td>
<td>0987654321-101-1</td>
<td>Renewal - Agent</td>
<td>05/04/2012</td>
</tr>
<tr>
<td>Agent Code: 0Z0002 (COUNTY INSURANCE AGENCY)</td>
<td>CHARLES &amp; CATHY CUSTOMER</td>
<td>099988777-101-1</td>
<td>Renewal - Agent</td>
<td>05/04/2012</td>
</tr>
<tr>
<td></td>
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<td>0995553331-633-1</td>
<td>New Policy - Insured</td>
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<td>New Policy - Agent</td>
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</tr>
</tbody>
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*Microsoft Excel - PLActivityReport 2012-01-21 to 2012-01-31.xls*
Frequently Asked Questions

How do I get access to the EPV Daily Activity report?

Agents are provided access to the report by their local Agency User Administrator (AUA). If you do not know your agency’s AUA, click the Your Agency User Administrator link under the User Profile section in the top navigation of Agent HQ. If you still need assistance, please call the Travelers Automation Support Helpdesk at 1-800-243-1334, option 5.

Will the EPV Daily Activity report require a special installation or password?

No. Once your AUA has given you access, you will see the report on the Agent HQ home page.

Which producer codes can I see on the report?

You will be able to view the report for any producer codes that are aligned with your Agent HQ ID. If you are missing any specific producer codes, please contact your AUA to have that code aligned with your ID.
Frequently Asked Questions, continued

How many results will be displayed on the report?

Results returned will display up to a maximum of 2,000 records for the date or date range selected.

What is the “Electronically Delivered” column on the Excel spreadsheet?

This column will be used for future enhancements.

If I select a date range on one day and run the report, why are there more policy documents if I select the same date range and run the report several days later?

The agent’s copy and the insured’s copy of the policy documents generally become available at different times.
What types of policy activity documents are available in the application?

The insured’s copy of the policy documents is available in the EPV Daily Activity report. To view the agent copy, please access the Policy View application. All types of policy activities are included in the EPV Daily Activity report except for the following:

- California earthquake letters
- Out of state license letters
- Homeowner nonrenewal letters
- Florida cancellation and termination notices
- Homesaver/Dwelling Fire, Umbrella and Personal Articles Floater cancellation and termination notices

These types of policy activities are available through the Policy View application on Agent HQ.