



Reports

Reports

There are several reports that you will find helpful in managing your business. To access these reports, click on Reports on the left-hand side under Administration. The reports listed below are key reports to help you maintain a successful fire business with Independent Mutual.

Open Open

AGENTREE Help Log Out

Administration

- Claims
- Reports
- Agent Info
- Current Policies
- Training Help

Policies

Static Reports

Get Acrobat Reader to view these reports

- APPLICATION FORMS
- RATE TABLE FORMS
- SC M/H AFFIDAVIT
- BANK AUTHORIZATION
- OUT OF STATE AFFID...
- MS - STATE PAGES
- COUNTRYWIDE UNDERW...
- ENDORSEMENT FORMS
- ANNUAL CONTENTS RE...
- KY M/H AFFIDAVIT
- BILLING INTERRUPTI...
- INITIAL LOSS AND F...
- TX - UNDERWRITING ...

Notification (1) Diary (0) Note Pad (0)

Notification (1) Open Only New

DATE	SENDER	TOPIC	MESSAGE	STATUS
06-23-2020 09:54	LOUANNE KOCHOA -	Cancelled	Policy has been cancelled effective	Open

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Agency Route List

- Listing of all policies that are assigned to your agency.
- You can generate this report by Agency or Zip Code.
- You may find it easier to enter a date into the AS OF Date field (ex. 7/2020) and the Status field (ex. In force or Lapsed). If you do not choose a status the report generated will list both lapse and in force policies.

10 Day Lapse Report

- Listing of all policies scheduled to lapse within 10 days from the date entered into the AS OF DATE field.
- The best way is to run this report in 3 sections, so you are covering your monthly lapses.
- You can generate the report for the first 10 days of the month, the middle 10 days of the month & the last 10 days of the month.
- By running these reports at the beginning of the month you will have your total lapses for the month.



Reports

Cash Receivables Register

- *Listing of all payments posted within the agency for a period of time specified.*
- *The first column **Processed By** of the report will show who processed the payment.*
- ***Payment Source** shows how the payment came through such as lockbox, mail pay, ACH Bank Draft, Home Office entry or other.*
- ***Payment Type** shows whether it was check or money order.*
- ***Date** shows the date the payment was applied.*

Agency Progress Report

- *When the report is generated by Month (ex. 7/2020 to 7/2020) a list will be generated of the following for this month. We encourage agents to run this report daily to review for any changes.*
 - *Reinstatements*
 - *New Business Submitted & processed*
 - *Endorsements Submitted & processed*
 - *Cancellations*

Agency Progress Report (Daily)

- *When the report is generated by Month (ex. 7/1/2020 to 7/31/2020) a list will be generated of the following for this month. We encourage agents to run this report daily to review for any changes.*
 - *Lapses*
 - *New Business Submitted & processed*
 - *Endorsements Submitted & processed*
 - *Cancellations*
- *This report is very useful in monitoring your lapses monthly. The report should be generated at on the 1st of each month to determine the lapses for the month. This will ensure that the agent is aware of the lapses for the month and can make contact with the customer to make sure the payment will either be mailed in to the home office using the billing notice provided to them by mail, called in using our Automated Phone System, Agent can convert the policyholder to ACH Bank Draft following our ACH Bank Draft rules or the policyholder can simply go online to make a payment.*

Agency Line Up Report

- *The Agency Line Up Report shows your beginning of the month APIF balance and the ending of the month APIF balance on your agency.*
- *This report should be generated on the 1st of each month for the previous month.*
- *If the report is run during the current month, you will only have a BOM APIF as the current month you currently in will not be available until the 1st of the next month.*
- *Ex. For June 2020 to see your BOM/EOM APIF, your report parameters should be 6/2020 and the report can be run on the July 1.*
- *This is a useful report to determine your increase/decrease for the previous month.*



Reports

Agency Route List

To run your Agency Route List:

- Click on Report # 2 Agency Route List
- Enter in the current date in the AS OF DATE field
- Click View Report
- Your Agency Route List will be generated

Open Open

AGENTREE
Help Log Out

Reports

NO	NAME
1	TERRITORY/PROTECTION CL REGISTER
2	AGENCY ROUTE LIST
3	10 DAY LAPSE REPORT
4	CASH RECEIVABLE REGISTER
5	AGENCY DEPOSIT RECONCILIATION
6	GENERAL AGENCY DEPOSIT RECON REPORT
7	SUBMITTED ENDORSEMENT REPORT
8	SUBMITTED BUSINESS REPORT
9	SUSPENDED POLICIES REGISTER
10	AGENCY PROGRESS REPORT
11	AGENCY PROGRESS REPORT (DAILY)
12	AGENCY MONTHLY INCREASE REPORT
13	GENERAL AGENCY MONTHLY INCREASE REPORT (COMPA...
14	AGENCY INCREASE RANKING REPORT
15	AGENCY COMPENSATION REPORT
16	GENERAL AGENCY COMPENSATION REPORT
17	AGENCY LINEUP REPORT
18	FIRST YEAR PREMIUMS
19	AGENT E-MAIL ADDRESSES
20	LAPSED POLICY REGISTER
21	PERSONNEL & CONTRACT STATUS
22	POLICY (SUSPENDED CASH) REPORT
23	POLICIES BY STATE
24	BANK DRAFT POLICIES
25	POLICIES PAID TO DATE

Report Parameters

Export Format: Adobe PDF

As Of Date (MM-DD-YYYY)

Company Code

City

Zip Code

Status (Lapse, InForce, Cancel)

Beg Call Back Date (MM-DD-YYYY)

End Call Back Date (MM-DD-YYYY)

Coverage Amt >= .

Premium Mode (M, Q, S)

Age

Dis

View Report

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Reports

10 Day Lapse Report

To run your 10 Lapse Report:

- Click on Report # 3 10 Day Lapse Report
- Enter in the current date in the AS OF DATE field (*this will generate from the date you enter into the AS OF DATE field to 10 days out*)
- Click View Report
- Your 10 Lapse Report will be generated

The screenshot shows a web application interface for generating reports. At the top left is the Independent Mutual Fire Insurance Co. logo. The page title is "Open Open". On the right, there are links for "AGENTREE Help" and "Log Out".

The main content area is divided into two sections:

- Reports:** A table listing 25 reports. The third report, "10 DAY LAPSE REPORT", is highlighted in yellow and has a black arrow pointing to it.
- Report Parameters:** A form with the following fields:
 - Export Format: A dropdown menu set to "Adobe PDF".
 - As Of Date (MM-DD-YYYY): A text input field with a black arrow pointing to it.
 - Company Code: A text input field.
 - Agency: A text input field.
 - District: A text input field.
 - View Report: A button with a black arrow pointing to it.

At the bottom of the page, there is a footer with the text: "HOME | PRIVACY POLICY | © Copyright 1999-2020 Property and Casualty Management Systems, Inc. POWERED BY: PCMS".



Reports

Cash Receivable Register

To run your Cash Receivable Register:

- Click on Report # 4 Cash Receivable Register
- Enter in the date in the From /To
- Click View Report
- Your Cash Receivable Register will be generated

Open Open

AGENTREE
Help Log Out

NO	NAME
1	TERRITORY/PROTECTION CLASS REGISTER
2	AGENCY ROUTE LIST
3	10 DAY LAPSE REPORT
4	CASH RECEIVABLE REGISTER
5	AGENCY DEPOSIT RECONCILIATION
6	GENERAL AGENCY DEPOSIT RECON REPORT
7	SUBMITTED ENDORSEMENT REPORT
8	SUBMITTED BUSINESS REPORT
9	SUSPENDED POLICIES REGISTER
10	AGENCY PROGRESS REPORT
11	AGENCY PROGRESS REPORT (DAILY)
12	AGENCY MONTHLY INCREASE REPORT
13	GENERAL AGENCY MONTHLY INCREASE REPORT (COMPA...
14	AGENCY INCREASE RANKING REPORT
15	AGENCY COMPENSATION REPORT
16	GENERAL AGENCY COMPENSATION REPORT
17	AGENCY LINEUP REPORT
18	FIRST YEAR PREMIUMS
19	AGENT E-MAIL ADDRESSES
20	LAPSED POLICY REGISTER
21	PERSONNEL & CONTRACT STATUS
22	POLICY (SUSPENDED CASH) REPORT
23	POLICIES BY STATE
24	BANK DRAFT POLICIES
25	POLICIES PAID TO DATE

Report Parameters

Export Format: Adobe PDF

From (MM-DD-YYYY):

To (MM-DD-YYYY):

Company Code:

Agency:

District:

Staff:

Region:

Policy:

Insured Name:

View Report

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Reports

Agency Progress Report

To run your Agency Progress Report:

- Click on Report # 10 Agency Progress Report
- Enter in the date in the From /To using the following format MM/YYYY
- Click View Report
- Your Agency Progress Report will be generated

The screenshot shows a web interface for generating reports. At the top left is the Independent Mutual Fire Insurance Co. logo. The page title is "Reports". Below the title is the "Agency Progress Report" section. A list of reports is displayed, with report #10, "AGENCY PROGRESS REPORT", highlighted and indicated by a black arrow. To the right of the list is a "Report Parameters" form. The form includes a dropdown for "Export Format" set to "Adobe PDF", and input fields for "From (MM-YYYY)", "To (MM-YYYY)", "Company Code", "Agency Zone", "Region", "District", "Staff", and "Agency Code". A "View Report" button is located below the form, with a black arrow pointing to it. The footer contains the text "HOME | PRIVACY POLICY | © Copyright 1999-2020 Property and Casualty Management Systems, Inc." and "POWERED BY: PCMS".

Open Open

AGENTREE
Help Log Out

NO	NAME
1	TERRITORY/PROTECTION CLASS REGISTER
2	AGENCY ROUTE LIST
3	10 DAY LAPSE REPORT
4	CASH RECEIVABLE REGISTER
5	AGENCY DEPOSIT RECONCILIATION
6	GENERAL AGENCY DEPOSIT RECON REPORT
7	SUBMITTED ENDORSEMENT REPORT
8	SUBMITTED BUSINESS REPORT
9	SUSPENDED POLICIES REGISTER
10	AGENCY PROGRESS REPORT
11	AGENCY PROGRESS REPORT (Detailed)
12	AGENCY MONTHLY INCREASE REPORT
13	GENERAL AGENCY MONTHLY INCREASE REPORT (COMPANIES)
14	AGENCY INCREASE RANKING REPORT
15	AGENCY COMPENSATION REPORT
16	GENERAL AGENCY COMPENSATION REPORT
17	AGENCY LINEUP REPORT
18	FIRST YEAR PREMIUMS
19	AGENT E-MAIL ADDRESSES
20	LAPSED POLICY REGISTER
21	PERSONNEL & CONTRACT STATUS
22	POLICY (SUSPENDED CASH) REPORT
23	POLICIES BY STATE
24	BANK DRAFT POLICIES
25	POLICIES PAID TO DATE

Report Parameters

Export Format: Adobe PDF

From (MM-YYYY):

To (MM-YYYY):

Company Code:

Agency Zone:

Region:

District:

Staff:

Agency Code:

View Report

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Reports

Agency Progress Report (Daily)

To run your Agency Progress Report (Daily):

- Click on Report # 11 Agency Progress Report Daily
- Enter in the date in the From /To using the following format MM/DD/YYYY
- Click View Report
- Your Agency Progress Report Daily will be generated

AGENTREE
Help Log Out

Open Open

Reports

NO	NAME
1	TERRITORY/PROTECTION CLASS REGISTER
2	AGENCY ROUTE LIST
3	10 DAY LAPSE REPORT
4	CASH RECEIVABLE REGISTER
5	AGENCY DEPOSIT RECONCILIATION
6	GENERAL AGENCY DEPOSIT RECON REPORT
7	SUBMITTED ENDORSEMENT REPORT
8	SUBMITTED BUSINESS REPORT
9	SUSPENDED POLICIES REGISTER
10	AGENCY PROGRESS REPORT
11	AGENCY PROGRESS REPORT (DAILY)
12	AGENCY MONTHLY INCREASE REPORT
13	GENERAL AGENCY MONTHLY INCREASE REPORT (COMPA...
14	AGENCY INCREASE RANKING REPORT
15	AGENCY COMPENSATION REPORT
16	GENERAL AGENCY COMPENSATION REPORT
17	AGENCY LINEUP REPORT
18	FIRST YEAR PREMIUMS
19	AGENT E-MAIL ADDRESSES
20	LAPSED POLICY REGISTER
21	PERSONNEL & CONTRACT STATUS
22	POLICY (SUSPENDED CASH) REPORT
23	POLICIES BY STATE
24	BANK DRAFT POLICIES
25	POLICIES PAID TO DATE

Report Parameters

Export Format

From (MM-DD-YYYY)

To (MM-DD-YYYY)

Company Code

Agency Zone

Region

District

Staff

Agency Code

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Reports

Agency Line Up Report

To run your Agency Line Up Report:

- Click on Report # 17 Agency Line Up Report
- Enter in the date in the From /To using the following format MM/DD/YYYY
- Click View Report
- Your Agency Progress Report Daily will be generated

Open Open

[Help](#) [Log Out](#)

Reports	
NO	NAME
1	TERRITORY/PROTECTION CLASS REGISTER
2	AGENCY ROUTE LIST
3	10 DAY LAPSE REPORT
4	CASH RECEIVABLE REGISTER
5	AGENCY DEPOSIT RECONCILIATION
6	GENERAL AGENCY DEPOSIT RECON REPORT
7	SUBMITTED ENDORSEMENT REPORT
8	SUBMITTED BUSINESS REPORT
9	SUSPENDED POLICIES REGISTER
10	AGENCY PROGRESS REPORT
11	AGENCY PROGRESS REPORT (DAILY)
12	AGENCY MONTHLY INCREASE REPORT
13	GENERAL AGENCY MONTHLY INCREASE REPORT (COMPA...
14	AGENCY INCREASE RANKING REPORT
15	AGENCY COMPENSATION REPORT
16	GENERAL AGENCY COMPENSATION REPORT
17	AGENCY LINEUP REPORT
18	FIRST YEAR PREMIUMS
19	AGENT E-MAIL ADDRESSES
20	LAPSED POLICY REGISTER
21	PERSONNEL & CONTRACT STATUS
22	POLICY (SUSPENDED CASH) REPORT
23	POLICIES BY STATE
24	BANK DRAFT POLICIES
25	POLICIES PAID TO DATE

Report Parameters

Export Format ▼

As Of (MM-YYYY)

Company Code

Agency Zone

Region

District

Staff

Agency Code

[View Report](#)