



Search For Existing Policies & Making Changes

Searching for Existing Policies

From your home page you have two options under Policies - Search and New. If you want to search for an existing policy, click on search.

The screenshot shows the AgentTree home page. 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 navigation menu includes "Administration", "Claims", "Reports", "Agent Info", "Current Policies", and "Training Help". The "Policies" section is highlighted with a red box, and a red arrow points to the "Search" button. Below the "Policies" section, there are "Quotes" and "Static Reports" sections. The "Static Reports" section lists various forms like "APPLICATION FORMS", "RATE TABLE FORMS", "SC M/H AFFIDAVIT", "BANK AUTHORIZATION", "OUT OF STATE AFFID...", "MS - STATE PAGES", and "COUNTRYWIDE UNDERW...". At the bottom, there is a notification table with one entry: "06-23-2020 09:54 | LOUANNE KOCHOA - Cancelled | Policy has been cancelled effective | Open".

From your home page of AgenTree, click on **Search**. Policy Search allows you to search for an existing policy using Reference Number (Policy Number), the name of the insured, the address, city or state.

The screenshot shows the AgentTree Policy Search results page. 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 shows "8 items match this criteria." Below this is a search form with fields for "Reference No", "Search Name", "Address", "City", and "State" (set to "ALL"). There are "SEARCH" and "NEW" buttons. Below the search form is a table of results:

REFERENCE NO	NAME	ADDRESS	CITY
SCP_900074730-20-06	Helen Bryan	1640 RIBAUT RD APT 1...	PORT ROYAL
SCP_900032959-20-06	MARVO ANTY	68 Carousel Rd	Gray Court
SCP_900018642-20-06	Alma Dubois	184 Frasier Hill Ln	Green Pond
SCP_900066630-20-05	Margaret W Guinyard	113 MACK HILL ST	ST MATTHEWS
SCP_900082470-20-06	Christina Wilkes	1800 KILLIAN LAKES D...	COLUMBIA
SCP_900067681-20-06	FREDRICK SIMMONS	3257 HIGHWAY 41	HUGER
SCP_900067258-20-05	Jeanette Brock	2006 Woodfield Dr.	COLUMBIA
NCP_900078020-20-05	Donald R Arthur	121 CHURCH STREET EX...	ROCKINGHAM

Below the table is a legend:

- Regular Item
- Alternate Item
- Selected Item
- Suspended Item
- Deleted Item
- Expired Item

At the bottom, there is a note: "* Please note that only active Policies are listed here by default. To view everything, check the box above." and a checkbox for "Include All Renewed Policies".



Search For Existing Policies & Making Changes

Once you have located the policy click on the Reference (policy) Number.

Reviewing Policy Information

One you have selected the Policy you wish to view, you are taken to the policy information screen. From the home page you can:

- Review coverage amount
- Review premium amount
- Check the Paid to Date
- Make a change to the policy
- Print policy jacket and/or declaration pages
- View Core Policy Billing Summary

View All Policies

Summary

Insured Name: [REDACTED]
Policy Number: [REDACTED] Status: Premium Paying Premium: \$24.05

COVERAGES	LIMITS	INCEPTION DATE	PREMIUM
Household Contents	\$8,000	07-01-2020	\$12.20
Emergency Expense Benefit	<input checked="" type="checkbox"/>	07-01-2020	\$1.75
Jewelry, Firearms and Furs	<input checked="" type="checkbox"/>	07-01-2020	\$1.20
Burglary	\$8,000	07-01-2020	\$8.90
Premium		\$24.05	
Paid To Date		08-01-2020	

[Make a Change](#)

REPORTS

Get Acrobat Reader to view these reports

- BILLING SUMMARY
- CORE POLICY BILLIN...
- PAYMENT HISTORY
- INSTALLMENT SCHEDU...
- DECLARATION PAGES
- FULL POLICY JACKET

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To make a change to the policy click on **Make a Change**.

Making Changes

To make a change to a policy you will need to print an Endorsement for Policy Change form from the home page of AgenTree. Once completed, fax the form to the Home Office using our toll free fax number (877) 509-5980 after you have completed the changes in AgenTree.

Changes can only be made to a policy with a status of Premium Paying. If a policy is in Suspense or Lapse status, the changes cannot be made on AgenTree. The policy will need to be paid current to make these changes on AgenTree.

By using the Search for Existing Policies above, search for the policy that the changes need to be applied.



Search For Existing Policies & Making Changes

Click on the Policy Number once you have located the policy in the list to the right of your screen that the changes need to be applied to. You will be directed to the policyholders information.

Open Open AGENTREE
Help Log Out

8 items match this criteria.

SEARCH	IMFI Policy			
REFERENCE NO	NAME	ADDRESS	CITY	
SCP_900074730-20-06	Helen Bryan	1640 RIBAUT RD APT 1...	PORT ROYAL	
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SCP_900066630-20-05	Margaret W Guinyard	113 MACK HILL ST	ST MATTHEWS	
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SCP_900067681-20-06	FREDRICK SIMMONS	3257 HIGHWAY 41	HUGER	
SCP_900067258-20-05	Jeanette Brock	2006 Woodfield Dr.	COLUMBIA	
NCP_900078020-20-05	Donald R Arthur	121 CHURCH STREET EX...	ROCKINGHAM	

* Please note that only active Policies are listed here by default. To view everything, check the box above.

Include All Renewed Policies

SEARCH **NEW**

LEGEND

- Regular Item
- Alternate Item
- Selected Item
- Suspended Item
- Deleted Item
- Expired Item

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Click on **Make a Change**.

View All Policies

Summary

Insured Name: [REDACTED] Status: Premium Paying Premium: \$24.05

Policy Number: [REDACTED]

COVERAGES	LIMITS	INCEPTION DATE	PREMIUM
Household Contents	\$8,000	07-01-2020	\$12.20
Emergency Expense Benefit		07-01-2020	\$1.75
Jewelry, Firearms and Furs		07-01-2020	\$1.20
Burglary	\$	07-01-2020	\$8.90
Premium		\$24.05	
Paid To Date		08-01-2020	

Make a Change

REPORTS

Get Acrobat Reader to view these reports

- BILLING SUMMARY
- CORE POLICY BILLIN...
- PAYMENT HISTORY
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There are many types of changes that can be made using AgenTree. Below is the list of changes that can be applied in AgenTree.

- General Information
 - Billing Type
 - Payment Plan Type
 - Additional Information
- Insured Name – Legal Name Change
 - Must provide endorsement for change form and court documents



Search For Existing Policies & Making Changes

- Insured Name – Marriage
- Insured Name – Correction
- Insured Name – Death of Primary Insured
 - Must provide endorsement for change form and court documents
- Insured Name – Divorce
- Insured Numbers
 - Account Number
 - Phone
 - Email
 - SSN#
- Additional Insured – Add/Modify
- Billing Address
- Property Address
- Property Details
 - Entrances
 - Type of Residence
- Coverage
- Underwriting Information

Choose the information you would like to change by clicking one of the options below.

The screenshot shows a web interface for managing policies. At the top, there is a navigation bar with a home icon and the text "View All Policies". Below this is a summary section for a specific policy, displaying "Insured Name:" (redacted), "Policy Number:" (redacted), "Status: Premium Paying", and "Premium: \$24.05".

The main area is titled "Policy Changes" and is divided into several sections:

- General:** Includes a link for "General Information" with sub-links for "Billing type, Payment Plan type, Additional Information".
- Insured:** This section contains several options for name changes:
 - Insured Name - Legal Name Change (Must provide endorsement for change and court documents)
 - Insured Name - Marriage
 - Insured Name - Correction
 - Insured Name - Death of Primary Insured (Must provide endorsement for change and death certificate)
 - Insured Name - Divorce
 - Insured Numbers (Account #, Phone, Email, SSN)
 - Billing Address
- Property:** Includes a link for "Property Address" and "Property Details (Entrances, type of residence...)"
- Coverage:** Includes a link for "Coverage (Coverage amount)" and "Underwriting Information".

On the left side of the interface, there are three buttons: "Notepad (1)", "Diary (0)", and "Notification (0)".

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." and "POWERED BY: PCMS".



Search For Existing Policies & Making Changes

From the screen below, you will notice that the Transaction Effective Date will default to the current date. You cannot back-date, or post-date changes, they should be completed in the system the same day the Endorsement for Policy Change Form is signed.

Click on **Go**.

The screenshot shows the 'View All Policies' interface. A modal window titled 'Change General Information' is open, displaying the following fields:

- Transaction Effective Date: 07-14-2020
- Last Transaction: 07-01-2020
- Effective Date: 07-01-2020
- Expiration Date: 08-01-2020

Buttons for 'GO' and 'CANCEL' are visible at the bottom of the modal. The background shows policy details for an insured name, policy number, and premium of \$24.05.

Make the changes on the screen that need to be applied to the policyholder information.

Once you have completed the changes, click on **Process Changes**.

The screenshot shows the 'View All Policies' interface with the 'Process Changes' button highlighted. The main area displays the following information:

- Insured Name: [Redacted]
- Policy Number: [Redacted]
- Status: Suspended Premium: \$24.05
- Effect on Premium for All Changes: Full Term: \$0.00 New Amount*: \$0.00
- Renewal Of Policy No
- U/W Status: Unknown U/W Suspend Date: 01-01-1900
- Total Premium: \$24.05 - MS
- Billing Type: Insured Bill (dropdown)
- Payment Plan: Monthly (dropdown)
- Agents must remit bank authorization forms to Home Office for bank draft changes or Monthly-EFT options
- Additional Information: [Text input field]

Buttons for 'Save & Continue', 'Process Changes', 'Make Another Change', and 'Cancel Changes' are visible at the bottom.



Search For Existing Policies & Making Changes

When asked if you are sure that you want to Process these changes, click on **Yes, I'm Sure**.

The screenshot displays the AgerTree interface for managing policies. A confirmation dialog box is overlaid on the screen, asking: "Are you sure you want to Cancel current changes". Below the question are two buttons: "Yes, I'm sure" and "No. Close this window". A large black arrow points to the "Yes, I'm sure" button. The background interface shows a sidebar with navigation options like Summary, Version Changes, Policy Changes, General, Insured, Property Address, Coverage, Underwriting, Notepad (3), Diary (0), and Notification (0). The main content area displays policy details for a suspended policy with a premium of \$19.05. It includes fields for Insured Name, Policy Number, Client Id, District (1591), Agency (11305), and Birth Year (1900). At the bottom of the interface, there are buttons for "Save & Continue", "Process Changes", "Make Another Change", and "Cancel Changes". The footer contains the text "HOME | PRIVACY POLICY | © Copyright 1999-2020 Property and Casualty Management Systems, Inc." and "POWERED BY: FCMS".

Once completed, fax the Endorsement for Policy Change form to the Home Office using our toll free fax number (877) 509-5980 after you have completed the changes in AgerTree.