

The logo features a dark grey vertical bar on the left with a curved bottom edge. To its right, the word "SmartOffice" is written vertically. "Smart" is in a bold, black, sans-serif font, while "Office" is in a white, outlined, sans-serif font. A registered trademark symbol (®) is positioned at the top right of the "Office" text.

SmartOffice[®]



Pending Case Management Tracking

Copyright © 1998-2004, E-Z Data, Inc., All Rights Reserved

No part of this documentation may be copied, reproduced, or translated in any form without the prior written consent of E-Z Data, Inc.

All product names are trademarks of their respective manufacturers or organizations.



918 E. Green Street
Pasadena, CA 91106

Web: <http://www.ez-data.com>

Telephone: (626) 585-3505

Fax: (626) 440-9097

U.S. toll-free fax: (800) 779-3123

Revised: 01-09-04

Table of Contents

Introduction	1
Pending Case Management Sub-Module	1
Accessing the Pending Case Management Module.....	1
Module Setup	2
PCM Search Window	3
Detail Tab	4
Approved.....	5
Delivered.....	6
Status and Dates Section	7
Basic Policy Information Section	8
Important Contact Section	10
Premium Information Section.....	10
Policy Advisor Summary Section	12
Policy Relationships Section.....	13
Policy Insured Summary	14
Disability (DI).....	16
Medical	17
LTC (Long Term Care).....	18
Annuity	18
Critical Illness	19
Other	19
Policy Stage Status Relationship Button.....	20
Policy Warnings Button.....	21
Policy Notes Button	22
Policy Summary Button.....	23
Underwriting Tab	23
Underwriting Information / Important Dates	23
Change Date Button.....	25
Reset Follow-Up Date Button.....	26
Recreate Underwriting Requirement Button.....	26
Advisor Requests Summary.....	27
Advisor Request Button.....	28
Delivery Tab	28

Premium Information Section.....	29
Miscellaneous Information Section	29
Policy Insured Summary	29
Delivery Requirements Summary	30
Rider Summary	32
Reinsurance Summary	33
Activity/Mail Tab	34
Activity Summary	35
E-mail Information Summary	35
Follow-Up Sub-Menu.....	36
PCM Button	36
Change Date Button	36
Reset Follow-Up Date Button.....	37
Change User Button	37
Compose E-mail Button.....	37
Teams	37
Team Search.....	37
Team Summary	38
Team Detail.....	38
Doctors	39
Doctor Search.....	39
Doctor Summary	39
Doctor Detail.....	40
Doctor Key Relations	40
Medical Facilities	41
Medical Facility Search	41
Medical Summary	41
Medical Facility Detail.....	42
Medical Facility Key Relations	42
Service Providers.....	43
Service Provider Summary	43
Service Provider Detail	43
Service Provider Key Relations.....	43

Introduction

The **Pending Case Management** (PCM) module is used to create and update the pre-inforce policies that are in the Underwriting stage. The user can track statuses, dates, basic policy and premium information, advisor information, important contacts, policy relationships, underwriting information, underwriting requirement activity, delivery requirements, and delivery policy information.

The **Pending Case Management** module consists of the following sub-modules:

- PCM (Pending Case Management)
- Follow-Up
- Team
- Doctor
- Medical Facility
- Service Provider

Pending Case Management Sub-Module

The **PCM sub-module** consists of the following basic sections:

- Summary
- Detail
- Underwriting
- Delivery
- Rider/Reinsurance
- Activity/Mail

Accessing the Pending Case Management Module

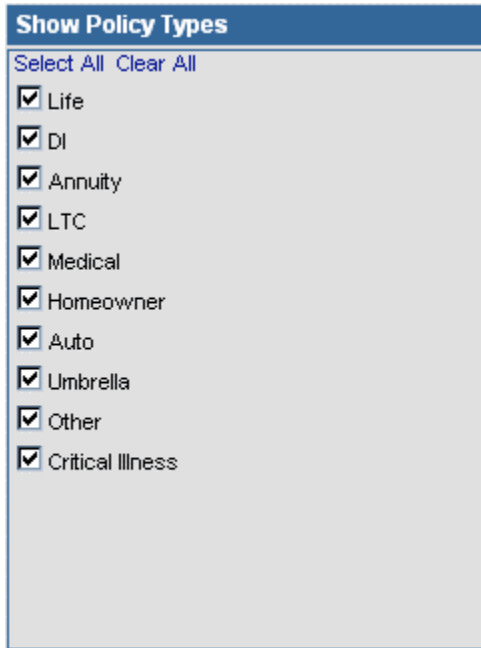
PCM can be accessed through any of the following methods:

- In the **Quick Add/Search** section, select **PCM** from the drop-down list and then click the **Go** button
- Select **Pending Case Management** from the main menu
- From the **Contact** module, click the **PCM** button
- From the **Policy Module**, click the **PCM** button
- From the **Carrier Module**, under the **Ind. Policy** tab (pending cases are highlighted in pink)
- From the **Product Module**, under the **Individual Policy** tab (pending cases are highlighted in pink)

Module Setup

To set up user rights to **Pending Case Management Tracking**, continue as follows:

1. From the main menu, click **User Setup** to open an expanded list and then select **User Preferences** to navigate to this option.
2. From the **User Preferences** section, click the **Policy/Investment** tab.
3. In the **Show Policy Types** section, click the **Select All** hypertext to show all policy types. Clearing these checkboxes prevents the user from viewing the respective policy type(s).



Show Policy Types

[Select All](#) [Clear All](#)

- Life
- DI
- Annuity
- LTC
- Medical
- Homeowner
- Auto
- Umbrella
- Other
- Critical Illness

4. If any changes are made, click the **Save** button to save the new settings.

PCM Search Window

To search pending cases, select **PCM** from the menu and choose **PCM Search** in the expanded menu to open the **Search Pending Cases** dialog box.

- To display a summary spreadsheet for all cases in the Underwriting stage, click the **Search** button without entering any search criteria.
- To display a summary spreadsheet based on specific criteria, enter a specific policy number, plan type, insurance type, etc.

Pending Case Summary						
		Policy Stage	Underwriting	Policy Type	All	
Summary	Detail	Underwriting	Delivery	Riders / Reinsurance	Activity / Mail	
Policy No	Contact Name	Carrier Name	Plan Type	POLICYFEE	Premium	Annual Premi
<input type="checkbox"/> 001-ZZ	Jensen, Paul	ABC Insurance Company	Term	500.00	500.00	6,000.00
<input type="checkbox"/> 001-BB	Jensen, Paul	ABC Insurance Company	Term	500.00	500.00	6,000.00
<input type="checkbox"/> 003-AA	Wong, Jane	ABC Insurance Company	Term	25.00	25.00	2,500.00
<input type="checkbox"/> 006-AA	Jensen, Paul	ABC Insurance Company	Term	600.00	600.00	2,400.00
<input type="checkbox"/> 004-CC	Jensen, Paul	ABC Insurance Company	Term	1,000.00	1,000.00	10,000.00

Detail Tab

To access the **Detail** tab, select a pending case. To select a case, click the checkbox next to the appropriate case.

Policy specific information such as Policy#, Carrier, Plan Name, Plan Type, Premium, and Mode are entered on this window along with Advisor Information, Important Contacts (Underwriter, HORep, Team, Agency Rep), and Policy Relationships.

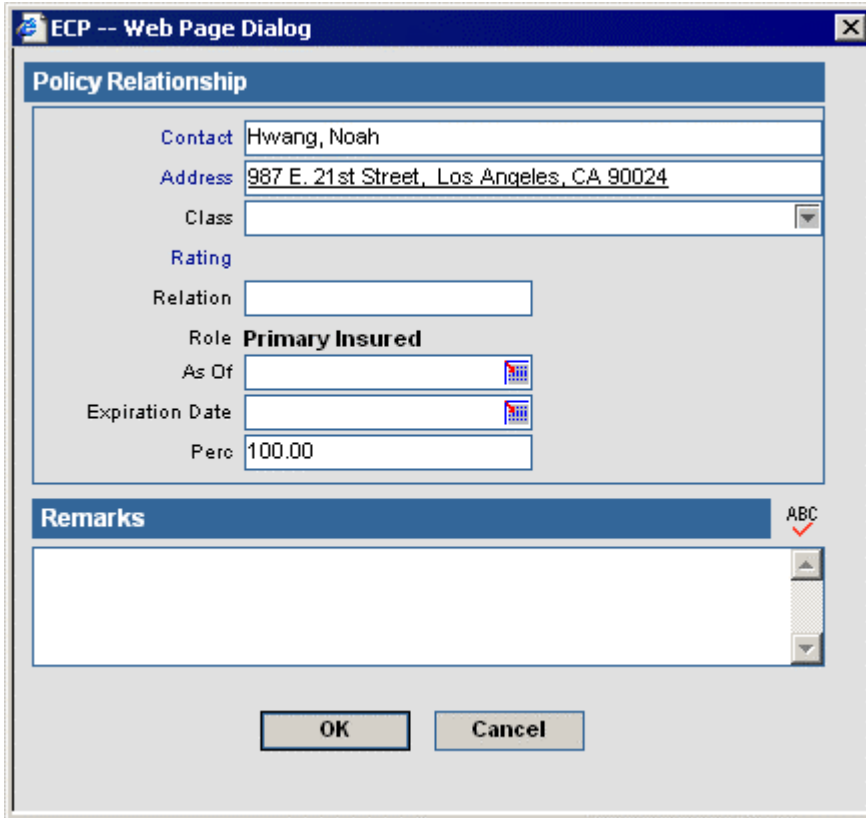
Pending Case - P823490 - Life - Joseph M. Ackerman - Preferred Life - 20th Century Life Insurance

Summary | **Detail** | Underwriting | Delivery | Riders/Reinsurance | Activity/Mail | Letters/Documents | Misc Information

Status and Dates		Premium Information	
Status	Issued	Date	12/09/2002
Signed	<input type="checkbox"/>	Submitted	10/02/2002 <input checked="" type="checkbox"/>
All Requirements In	<input type="checkbox"/>	Approved	10/10/2002 <input checked="" type="checkbox"/>
Issued	12/09/2002 <input checked="" type="checkbox"/>	Delivered	11/18/2002 <input checked="" type="checkbox"/>
Inforce	<input type="checkbox"/>		
Basic Policy Information		Policy Advisor Summary	
Policy #	P823490	Case #	250
Carrier	20th Century Life Insurance		
Plan Name	Preferred Life		
Plan Type	WL	Sub Type	
State	CA	Cash Received	200.00
Inforce Request	9024 Exchange	Alternate Policy#	
Priority	Very Important	Replacement	<input type="checkbox"/>
Face Amount	100,000	Undenwritten Amt	100,000
Important Contacts		Policy Insured Summary	
Underwriter	Jackson, Matthew	HORep	Wong, Jessica
Team	Central	Case Manager	Peter Stevens
Contact	Joseph M. Ackerman		
Policy Relationships		Policy Relationships	
Role	Contact Name		
<input type="checkbox"/>	Primary Contact	Ackerman, Joseph	
<input type="checkbox"/>	Owner	Ackerman, Joseph	
<input type="checkbox"/>	Payor	Ackerman, Joseph	

Approved

When the pending case status is changed to **Approved**, the **Policy Relationship** dialog box opens. Any changes between applied for and approved Primary Insured information is entered here.



The screenshot shows a dialog box titled "ECP -- Web Page Dialog" with a "Policy Relationship" section. The fields are as follows:

Contact	Hwang, Noah
Address	987 E. 21st Street, Los Angeles, CA 90024
Class	
Rating	
Relation	
Role	Primary Insured
As Of	
Expiration Date	
Perc	100.00

Below the fields is a "Remarks" section with a text area and a "ABC" label with a red checkmark. At the bottom are "OK" and "Cancel" buttons.

Delivered

When the pending case status is changed to **Delivered**, the Pending Case dialog box opens. Any changes between applied for and Delivered policy information, such as insured class and Pay Method, is entered here. The information carries over to the **Delivery** tab.

ECP -- Web Page Dialog

Pending Case - 02643213 - Life - Mike Anderson - Universal Coverage - ABC Life

Premium Information		Miscellaneous Information					
Modal Premium	1,900.00	Decision Date/Policy Date	11/23/2001				
Pay Method	Direct Bill	Delivery State/Pay To Date					
Initial Cash Received		Carrier Delivery Expiration	02/18/2003				
Balance	0.00	Office Delivery Expiration	01/09/2003				
Target	0.00	Policy Insured Summary					
Lump Sum	0.00	<table border="1"> <thead> <tr> <th>Contact Name</th> <th>Class</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/> Anderson, Mike</td> <td>Standard Smoker</td> </tr> </tbody> </table>		Contact Name	Class	<input type="checkbox"/> Anderson, Mike	Standard Smoker
Contact Name	Class						
<input type="checkbox"/> Anderson, Mike	Standard Smoker						
Comm Modal							
Delivery Mode	Annual						
PAC Draw Day	0						
Add'l Cash Received	0						
Excess Paid	0.00						
Excess Prem	0.00						
1035	0.00						
Comm Annlzd	1,900.00						
Annlzd Prem	1,900.00						

Delivery Requirements Summary

Policy #	Insured Name	Status	Follow-Up	Remarks	Description
<input type="checkbox"/> 02643213	Anderson, Mike	Received - GA	12/14/2002		Await Policy

OK Cancel

Status and Dates Section

The **Status and Dates** section is used to track the current status, status date and status history.

When a new case is added to the PCM module, the Status defaults to the status stated in the PCM initial workflow (Example: Submitted). For more information, see the **PCM Setup** document. The Status and Date fields reflect the current status and its associated date. The rest of the section displays key statuses that offer the associated dates in read-only mode. Selecting a status checkbox will update the case status and date as well as populate the read-only date field next to the status with the current date. If the checkbox is already selected with a previous date when clicked, the date will refresh with the current date. However, if the checkbox is already selected with today's date and then selected, the user has the option to delete the date from the read-only display and from the history. Please note that only today's date can be deleted in this manner.

While in Edit mode, the user can change the contents of the Status and Date fields. The Status field lists all available statuses for selection. When a selection is first made in the Status field, the associated date checkbox becomes selected and the respective date is noted or updated. When the Status is selected, the Date field is also populated with today's date. This date can be changed before saving. The case must be saved before the logic connected with the Status field will take effect.

Status	Checked	Date
Signed	<input type="checkbox"/>	
Submitted	<input type="checkbox"/>	10/02/2002
All Requirements In	<input type="checkbox"/>	
Issued	<input checked="" type="checkbox"/>	12/09/2002
Inforce	<input type="checkbox"/>	
Approved	<input checked="" type="checkbox"/>	10/10/2002
Delivered	<input checked="" type="checkbox"/>	11/18/2002

To see a history of the status and the dates associated with those statuses, click on the Status hyperlink to open the **Pending Case History Summary** window.

Status	Date
<input type="checkbox"/> Submitted	10/02/2002
<input type="checkbox"/> Mailed	10/03/2002
<input type="checkbox"/> Approved	10/10/2002

Additional statuses along with their associated dates can be added in the **Pending Case History Summary** window. Doing so will not modify the current status, but it will add them to the history.

Basic Policy Information Section

Under the **Basic Policy Information** section, the same basic information for all types of insurance is tracked. **Cash Received** is the amount of money received with the application, prior to approval. Cash Received is directly connected with **Initial Cash Received** under the **Delivery** tab. If the value in the Cash Received field (**Detail** tab) is changed, the Initial Cash Received field (**Delivery** tab) is automatically updated and vice versa.

An alternate case can be linked to the current case through the **Alternate Policy #** field. This is a copy of an original case with some modifications.

Basic Policy Information			
Policy #	P823490	Case#	25
Case Unique ID			
Carrier	20th Century Life Insurance		
Plan Name	Preferred Life		
Plan Type	WL	Sub Type	10YRT
State	CA	Cash Received	150.00
Inforce Request		Alternate Policy#	1980788
Priority	Important	Replacement	<input type="checkbox"/>
Face Amount	100,000	Underwritten Amt	100,000

To view or modify exchange information, click on the blue **Inforce Request** hyperlink to open the **Exchange Information Summary** spreadsheet.

Exchange Information Summary			
Company	City	Processor	Status
<input type="checkbox"/> First National Insurance Company	Columbus	Trisha	Open

To add an entry to this window, click the **Add** button to open the **Exchange Information** dialog box.

Information on the origin, status and date of an exchange can be found under the **Exchange Information** section.

Exchange Information

Policy # P823490

Company First National Insurance Company

City/State Columbus Ohio

Processor Trisha

Last Action/Status 04/08/2002 Open

Open/Close DT. 04/08/2002

Notes1

Notes2

Exchange Policy Information

ExcPolicyNo	Fund Date	Fund Amt
<input type="checkbox"/> 44698526	04/30/2002	13264.24

OK Cancel

To note the amount of the fund along with when it was received, click the **Add** button to enter additional information. The **Processor** field automatically populates the Processor's name from the previous window. The **Amt. Rcvd** (Amount Received) field must be populated in order to save this information.

Exchange Policy Information

Processor Trisha

Ex Policy No 446821

Funds Rcvd. 04/30/2002

Amt. Rcvd. 1364.50

Policy Notes

OK Cancel

Important Contact Section

The important Contact section displays the Underwriter, Home Office Representative, Team, Case Manager, and Primary Contact.

Important Contacts			
Underwriter	Matthew Jackson	HORep	Jessica Wong
Team	Central	Case Manager	Peter Stevens
Contact	Joseph M. Ackerman		

Premium Information Section

The **Premium Information** section stores the proposed premium information. **Annlzd Prem** is the **Modal Premium** multiplied by the number of payments the specified **Prem Mode** (Premium Mode) makes in a year. If the Prem Mode or Modal Premium is changed, the Annualized Premium will re-calculate. Excess is the difference between target and annual. The PCM module automatically populates this field. **Comm Modal** is equal to **Base Commissionable Premium** in the **Premium Breakdown** dialog box.

Premium Information			
Modal Premium	150.00	Prem Mode	Monthly
Pay Method	Direct Bill	Annlzd Prem	1,800.00
Target	600.00	Excess Prem	100.00
Lump Sum	300.00	1035	200.00
Comm Modal		Comm Annlzd	
FYC	100.00	Renewal Comm	500.00

To view or modify premium breakdown information, click the **Modal Premium** hyperlink to open the **Premium Breakdown** dialog box. These fields are populated using the settings in the **Product Fee Information** and **Product Fee Commissionable** sections in the Product module and the **Modal Premium** and **Premium Mode** fields in the PCM module.

On initial entry of a pending case -- enter the **Premium**, **Premium Mode**, and **Payment Method**. When the information is saved, the following actions occur:

- The **Policy Fee** and the **Non-Commissionable Fee** are calculated from the **Product Fee Information** and **Product Fee Commissionable** sections of the Product Module and the **Premium Mode** and **Payment Method** of the policy.
- The **Base Commissionable Premium** is calculated as the **Premium** minus the **Policy Fee**, **Non Commissionable Fee**, and the **Flat Extra Premium**.
- The **Comm Annlzd** field is calculated as **Base Commissionable Premium** times the number of payments in a year.

When modifying the case, the following rules are used:

If the **Premium** field is modified:

- The **Base Commissionable Premium** is recalculated to equal the **Premium** minus the **Policy Fee**, **Non Commissionable Fee**, and **Flat Extra Premium**.
- **Comm Annlzd** is recalculated.

If the **Prem Mode** (Premium Mode) or **Pay Method** (Payment Method) fields are modified:

- The **Policy Fee** and **Non Commissionable Fee** are recalculated using the modal factor of the new mode/method. If there is not a modal factor listed for that mode/method combination, the **Policy Fee** and **Non Commissionable Fee** values will equal 0.
- **Base Commissionable Premium** is recalculated (**Premium** minus the **Policy Fee**, **Non Commissionable Fee**, and **Flat Extra Premium**).
- **Comm Annlzd** (Commissionable Annualized) is recalculated.

If the **Face Amount** is modified:

- The **Policy Fee** and **Non Commissionable Fee** are recalculated using the modal factor of the new mode/method. If there is not a modal factor listed for that mode/method combination, the **Policy Fee** and **Non Commissionable Fee** values will equal 0.
- **Base Commissionable Premium** is recalculated (**Premium** minus the **Policy Fee**, **Non Commissionable Fee**, and **Flat Extra Premium**).
- **Comm Annlzd** (Commissionable Annualized) is recalculated.
- If the **Base Commissionable Premium** is modified:
 - **Modal Premium** will be recalculated as follows: **Base Commissionable Premium** plus **Policy Fee**, **Non-Commissionable Fee**, and **Flat Extra**.
 - **Annlzd Prem** (Annualized Premium) will be recalculated as follows: **Modal Premium** times the number of payments per year.
 - **Comm Annlzd** (Commissionable Annualized) will be recalculated.

The image shows a screenshot of a web page dialog box titled "ECP -- Web Page Dialog". The dialog box contains a section titled "Premium Breakdown" with a sub-section "Modal Values". Below this, there are four input fields with their respective values:

Base Commissionable Premium	150.00
Policy Fee	0.00
Non Commissionable Fee	0.00
Flat Extra Premium	135.00

At the bottom of the dialog box, there are two buttons: "OK" and "Cancel".

Policy Advisor Summary Section

The Policy Advisor Summary lists the Advisor information for the pending case.

Policy Advisor Summary	
First Last Name	Interest
<input type="checkbox"/> Philip Anderson	75.00
<input type="checkbox"/> Gregory Laymen	25.00

To add an Advisor, click the **Add** button to open the **Policy Advisor** dialog box.

The screenshot shows a web browser window titled "ECP -- Web Page Dialog". Inside the window is a "Policy Advisor Information" dialog box. The dialog box has a title bar with a close button and a currency icon. The main area contains several input fields: "Advisor" (text box with "Philip Anderson"), "Relation" (empty text box), "Role" (dropdown menu with "Primary Advisor" selected), "Split Percent" (text box with "75.00"), "As of Date" (calendar icon), "Expiration Date" (calendar icon), "Contract Information" (empty text box), and "Hierarchy Locked" (checkbox). Below these fields is a "Remarks" section with a text area and a vertical scrollbar. At the bottom of the dialog box are "OK" and "Cancel" buttons.

Policy Relationships Section

The **Policy Relationships** section can be used to define the Owner, Payor, Beneficiary, Annuitant, Loss Payee, Collateral Assignee, and/or Absolute Assignee for the policy.

Policy Relationships	
Role	Contact Name
<input type="checkbox"/> Primary Contact	Ackerman, Joseph
<input type="checkbox"/> Owner	Ackerman, Joseph
<input type="checkbox"/> Payor	Ackerman, Joseph

To add a policy relationship, click the **Add** button to open the **Policy Relationship** window. The **Contact** field refers to the person with whom the case has a relationship. **Relation** refers to the relationship the contact has with the primary insured of the policy. **Role** refers to the contact's relationship to the case. **As Of** is when the contact became associated with the case and **Expiration Date** is when the contact is no longer connected with the case. **Perc** is the amount the contact is related to the case. For example, the **Perc** of a beneficiary determines the percent of the benefit the associated contact will receive.

Policy Relationship

Contact: Ackerman, Kathleen
Address: 488 S. Oakland Avenue, Pasadena, CA 91101
Relation: Wife
Role: Beneficiary
As Of: 11/19/2002
Expiration Date:
Perc: 100.00

Remarks

OK Cancel

Policy Insured Summary

The Policy Insured Summary lists the Primary Insured and the other insured contacts for that policy.

Policy Insured Summary	
Role	Contact Name
<input type="checkbox"/> Primary Insured	Ackerman, Joseph

Select an insured contact and click the **Impairments** button to open the Impairments dialog box. Impairment information will carry over for all policies and pending cases for the contact.

Miscellaneous Information		Miscellaneous Information	
Insured Name: Ackerman, Kenneth	Maiden Name: <input type="text"/>		
Height: <input type="text" value="6.2"/>	Place Of Birth: <input type="text" value="Arcadia"/>		
Weight: <input type="text" value="200.0"/>	Country: <input type="text"/>		
Last Seen By Doctor: <input type="text" value="05/15/2002"/>	State: <input type="text" value="CA"/>		

Impairments				
Impairments	Diagnosis Date	Cure Date	Medication	Details
<input type="checkbox"/> Asthma	10/18/1995		Inhaler	Asthma acts up during aggressive exercising.
<input type="checkbox"/> Diabetes	02/06/2000		Insulin	Hypergluc.

To add an insured contact, click the **Add** button in the **Policy Insured Summary** to open the **Policy Relationship** window.

The screenshot shows a window titled "ECP -- Web Page Dialog" with a sub-header "Policy Relationship". The form contains the following fields:

- Contact: Ackerman, Joseph
- Address: (empty)
- Class: Preferred Non-Smoker
- Rating: (empty)
- Relation: Son
- Role: Primary Insured
- As Of: (empty)
- Expiration Date: (empty)
- Perc: 100.00

Below the form is a "Remarks" section with a text area and a "Remarks" label. At the bottom are "OK" and "Cancel" buttons.

To view, add, modify, or delete policy ratings for a particular insured contact, click the **Rating** hyperlink in the **Policy Relationship** window to open the **Policy Rating Information** window.

The screenshot shows a window titled "ECP -- Web Page Dialog" with a sub-header "Policy Rating Information". The form contains the following fields:

- Policy #: P823490
- Insured: Joseph Ackerman
- Rate: (empty)
- Role: Primary Insured
- Rate Reason: Chewing Tobacco
- Rating %: (empty)
- Flat Rating: (empty)
- ADB Rating: (empty)
- DI Rating: (empty)
- Temp Rating: (empty)
- Temp Rating YR: (empty)

Below the form is a "Remarks" section with a text area and a "Remarks" label. At the bottom are "OK" and "Cancel" buttons.

Basic Policy Information Section based upon Product Types

Disability (DI)

Class is a product-specific field and is directly linked to the **Product** module. The user can choose an option from a list of previously set risk classes. **Benefit Amount** is the most money the client can receive per accident/illness. **Benefit Period** is how long the benefit will pay out. **Elimination** is the number of days that the client has to be injured or ill before the benefit will pay out. **Rating** refers to an additional rating on a class.

Basic Policy Information		
Policy #	90129911-009A	Case#
Case Unique ID		
Carrier	Blue Medical	
Plan Name	Maximum Shield	
Plan Type	Sub Type	
State	CA	Cash Received
Inforce Request		Alternate Policy#
Priority	Important	Replacement
Occup. Rate	1	
Class	All Classes	
Benefit		
	Per Accident	Sickness
Benefit Amount	10,000.00	7,000.00
Benefit Period	5	5
Elimination	0	7
Rating	Table B	
LumpSum Benefit		
Total Buyout Cov		
Buyout Funding	Down Payment	

Medical

PPO and Non-PPO information can be tracked using this insurance type. **Deductible** is the amount the client has to pay before the insurance will begin covering costs. **Co-Payment** is the amount of out-of-pocket money the client will pay per doctor visit. **Life Time Max** is the maximum amount the client will have to pay in a lifetime.

Basic Policy Information		
Policy #	1226325	Case#
Case Unique ID		
Carrier	North American Medical	
Plan Name	Bene-PPO	
Plan Type	PPO	Sub Type
State		Cash Received
Inforce Request	None	Alternate Policy#
Priority		Replacement
Class		
All Classes		
Benefit	PPO	Non-PPO
Deductible	500	
Co-Payment	15	
Life Time Max	5,000,000	

LTC (Long Term Care)

Coverage Selection specifies the type of coverage carried by the client. **Benefit Length** is the amount of time the benefit will pay out. If the **Tax Type** is qualified, the policy is not taxed and if the Tax Type is non-qualified, then the policy is taxed. **Max Lifetime Benefit** is the maximum amount the policy will pay to the client in a lifetime. **Max Daily Benefit** is the maximum amount the policy will pay to the client in a day. **Elimination Period** is the number of days the client has to be injured or ill before the policy will pay out.

Basic Policy Information		
Policy #	91231-002AB	Case#
Case Unique ID		
Carrier	Blue Sky Mutual	
Plan Name	Sentinel 100	
Plan Type	Sub Type	
State	CA	Cash Received
Inforce Request		Alternate Policy#
Priority		Replacement <input type="checkbox"/>
Class: Standard Non-Smoker		
Coverage Selection	Abeyance	
Benefit Length(Years)	10	
Tax Type	Non-Qualified	
Benefit	Facility Care	Home Care
Max Lifetime Benefit	160,000.00	
Max Daily Benefit	140.00	
Elimination Period	90	

Annuity

If the **Tax Type** is qualified, the policy is not taxed and if the Tax Type is non-qualified then the policy is taxed.

Basic Policy Information		
Policy #	29347-2	Case#
Case Unique ID		
Carrier	ABC Life	
Plan Name	Market Rate Annuity	
Plan Type	Sub Type	
State	AZ	Cash Received
Inforce Request	None	Alternate Policy#
Priority		Replacement <input type="checkbox"/>
Tax Type: Non-Qualified		
Class:		

Critical Illness

Basic Policy Information			
Policy #	<input type="text"/>	Case#	<input type="text"/>
Case Unique ID	Case-66000-1209		
Carrier	ABC Life		
Plan Name	CI		
Plan Type		Sub Type	
State	CA <input type="text"/>	Cash Received	0.00
Inforce Request	9024 Exchange <input type="text"/>	Alternate Policy#	<input type="text"/>
Priority	Important <input type="text"/>	Replacement	<input type="checkbox"/>
Face Amount	<input type="text"/>		

Other

Other can be used to track any other type of insurance not previously listed.

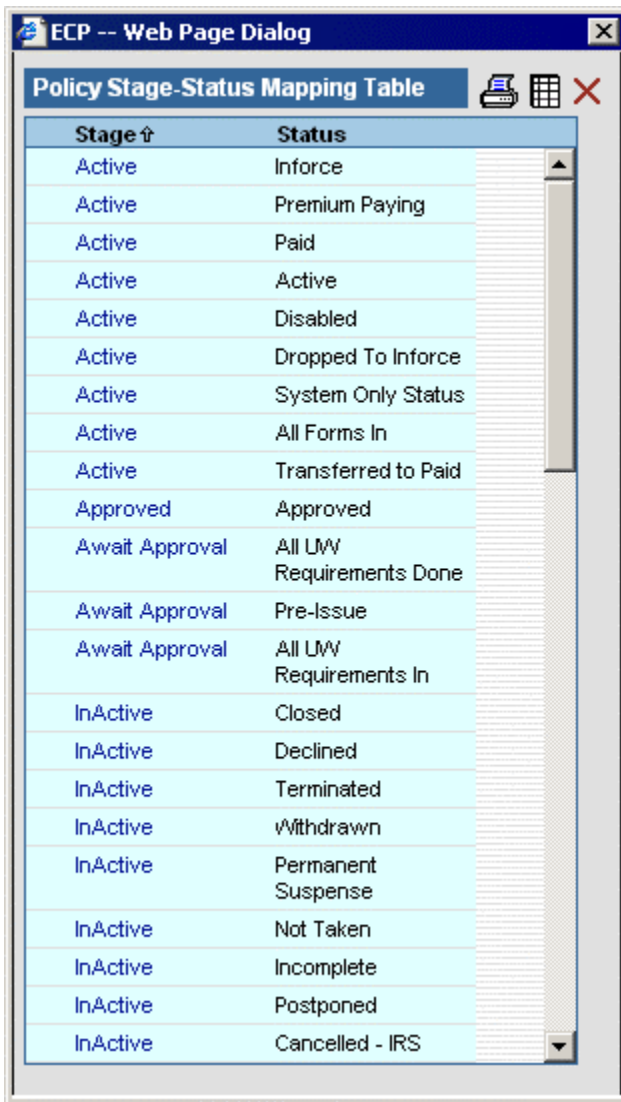
Basic Policy Information			
Policy #	NL019882113	Case#	<input type="text"/>
Case Unique ID			
Carrier	Nations Life Insurance		
Plan Name	New Horizon 60		
Plan Type		Sub Type	
State	AZ <input type="text"/>	Cash Received	<input type="text"/>
Inforce Request	<input type="text"/>	Alternate Policy#	<input type="text"/>
Priority	Important <input type="text"/>	Replacement	<input type="checkbox"/>
Class	<input type="text"/>		

Policy Stage Status Relationship Button

To view the relationships between stages and statuses, click the **Policy Stage Status Relationship** button to open the **Policy Stage/Status Mapping Table** window.

The policy stages are: **Proposed**, **Await Approval**, **Approved**, **Underwriting**, **Issued**, **Active** and **InActive**. The **Active** stage is linked to statuses that are used to process Inforce policies (see **Policy** documentation). The **InActive** stage is linked to statuses that are used for expired or rejected policies. The **Proposed** stage is linked to statuses that are used to process a case pre-underwriting, like a trial case. The **Underwriting** stage is linked to statuses that are used to process a pending case. **Await Approval** and **Approved** are two additional Underwriting stages.

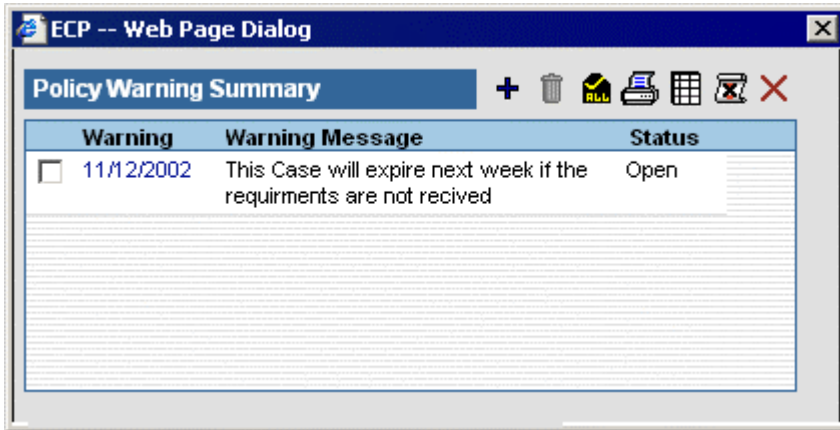
The Status-Stage relationships can be modified from the Configuration Office.



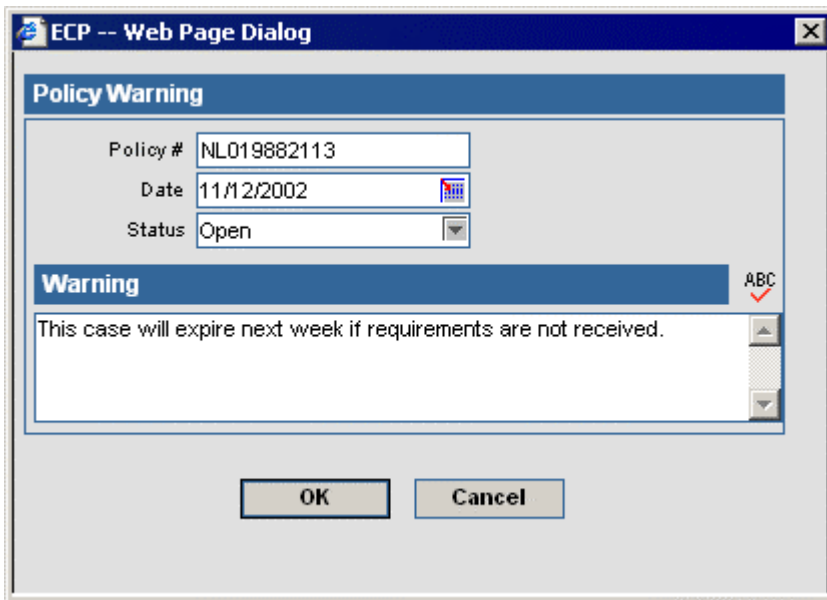
Stage ↑	Status
Active	Inforce
Active	Premium Paying
Active	Paid
Active	Active
Active	Disabled
Active	Dropped To Inforce
Active	System Only Status
Active	All Forms In
Active	Transferred to Paid
Approved	Approved
Await Approval	All LW Requirements Done
Await Approval	Pre-Issue
Await Approval	All LW Requirements In
InActive	Closed
InActive	Declined
InActive	Terminated
InActive	Withdrawn
InActive	Permanent Suspense
InActive	Not Taken
InActive	Incomplete
InActive	Postponed
InActive	Cancelled - IRS

Policy Warnings Button

To view, add, modify, or delete policy warnings, click the **Policy Warnings** button to open the **Policy Warning Summary** spreadsheet.



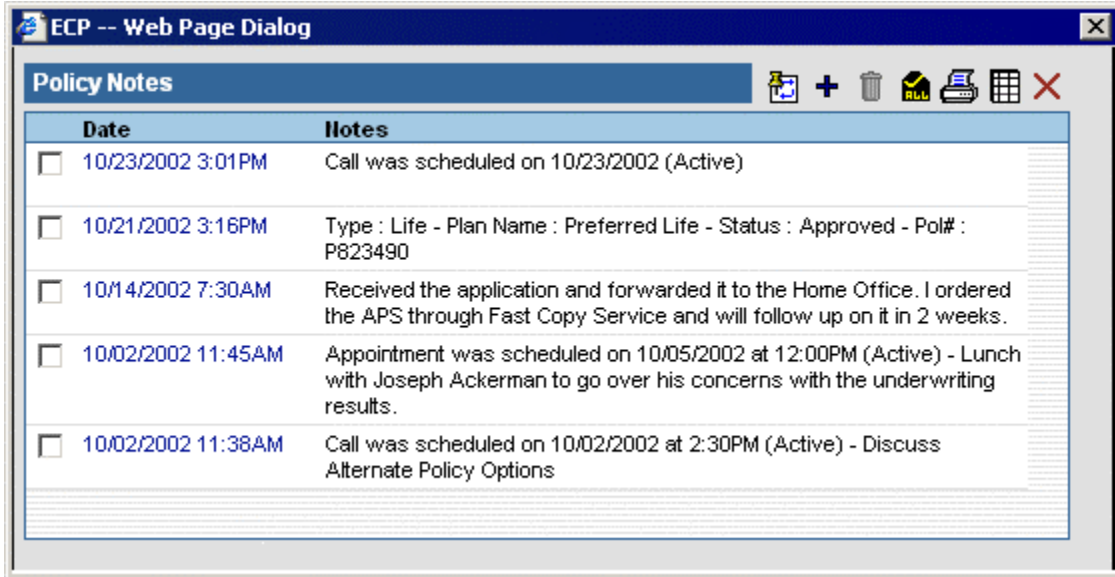
To enter a new warning, click the **Add** button to open the **Policy Warning** dialog box.



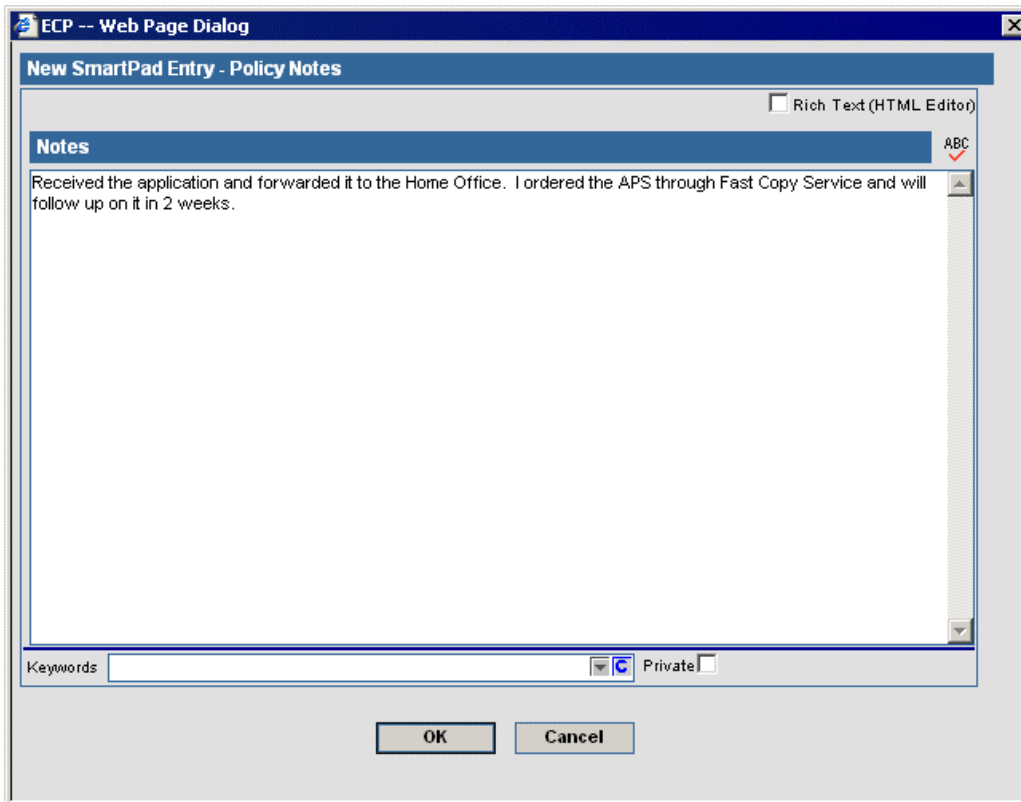
To change the warning status to Closed, select the warning in the Warning Summary and click the **Close Warning** button. When a case has a warning with an Open status, the **Policy Warnings** button will blink as a reminder that something important needs to be addressed on this case.

Policy Notes Button

To add or view notes on the policy, click the **Policy Notes** button to open the **Policy Notes** spreadsheet.



To add a new policy note, click the **Add** button to open the **Policy Notes Detail** dialog box.



Policy Notes can also be viewed from the **Policy** module.

Policy Summary Button

Click the **Policy Summary** button to go to the current case's record in the policy module. Click on the **PCM** button while in the Policy Module to return to PCM.

Underwriting Tab

Underwriting Information and the Advisor Requirement Summary are located on the **Underwriting** tab.

Pending Case - P823490 - Life - Joseph M. Ackerman - Preferred Life - 20th Century Life Insurance

Summary | Detail | **Underwriting** | Delivery | Riders/Reinsurance | Activity/Mail

Underwriting Information / Important Dates

Description	Status	Follow-Up	Service Provider Name	Remarks
<input type="checkbox"/> HOS	Received	11/04/2002	EMSI	
<input type="checkbox"/> Blood Profile	Scheduled	11/04/2002	EMSI	
<input type="checkbox"/> Telephone Interview	Outstanding	11/04/2002		To complete the part II
<input type="checkbox"/> Medical Check	For Your Records	11/13/2002	EMSI	
<input type="checkbox"/> Personal Interview	Received	11/13/2002		

Advisor Requests Summary

Request Type	Advisor Name	Carrier Name	Status	Follow-Up	Completed
<input type="checkbox"/> Appointment	Anderson, Philip	ABC Life	Pending	11/09/2002	
<input type="checkbox"/> E & O	Anderson, Philip	ABC Life	Pending	11/11/2002	
<input type="checkbox"/> Contracting	Anderson, Philip	ABC Life	PCM Add	11/09/2002	

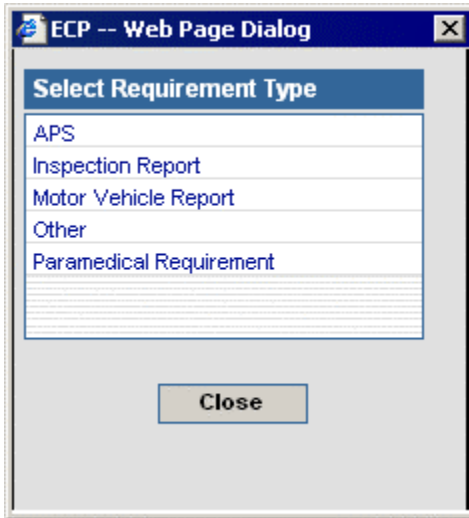
Underwriting Information / Important Dates

Underwriting requirements are automatically populated by PCM based on underwriting guidelines created in the Product module. For further information, see the **Product Module** document.

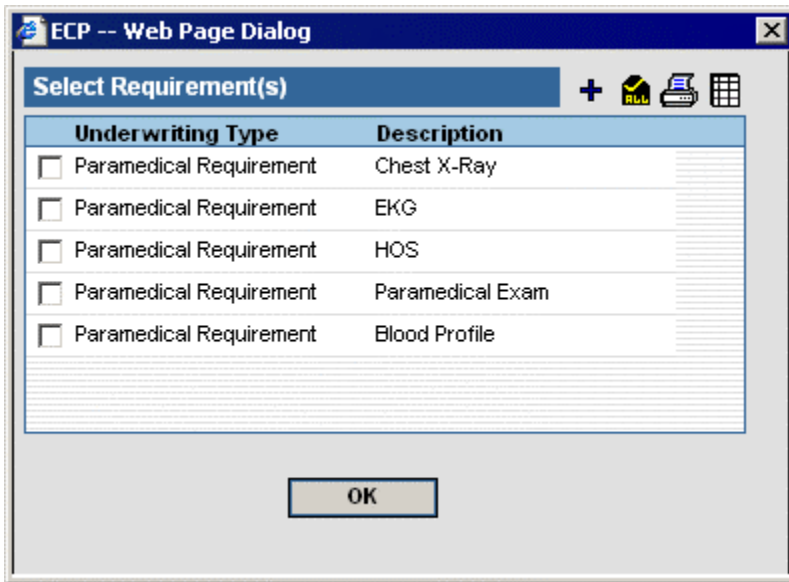
Underwriting Information / Important Dates

Description	Status	Follow-Up	Service Provider Name	Remarks
<input type="checkbox"/> HOS	Received	11/04/2002	EMSI	
<input type="checkbox"/> Blood Profile	Scheduled	11/04/2002	EMSI	
<input type="checkbox"/> Telephone Interview	Outstanding	11/04/2002		To complete the part II
<input type="checkbox"/> Medical Check	For Your Records	11/13/2002	EMSI	
<input type="checkbox"/> Personal Interview	Received	11/13/2002		

To designate an additional underwriting requirement, click the **Add** button to open the **Select Requirement Type** dialog box.



Select a requirement type to open the **Select Requirement(s)** spreadsheet. This spreadsheet will list only the requirements related to the selected requirement type. The listed requirements are created in **PCM Setup/Configuration**.



Select a requirement and click the **OK** button to display the **Underwriting Requirement Detail** window. **Medical Facility** is the facility that handles the requirement. For example, if the policy requires a blood sample and Foothill Medical Center is performing the blood test, that facility will be listed in the Medical Facility field. This window also opens when a requirement is modified. When the **Completed Date** is entered, the **Follow-Up Date** is automatically deleted. The user can enter a new Follow-Up date if necessary.

Change Date Button

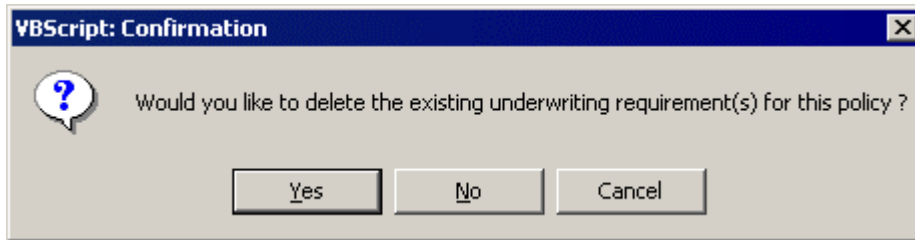
Select a requirement and click the **Change Date** button to open the **Requirement Dates** dialog box. Here the requirement's **Status**, **Status Date**, **Required Of**, **Follow-Up** date, and **Completed Date** can be updated.

Reset Follow-Up Date Button

Select a record and click the **Reset Follow-Up Date** button to renew the Follow-Up date based upon the current date. The calculation used is entered in the **Carrier** module.

Recreate Underwriting Requirement Button

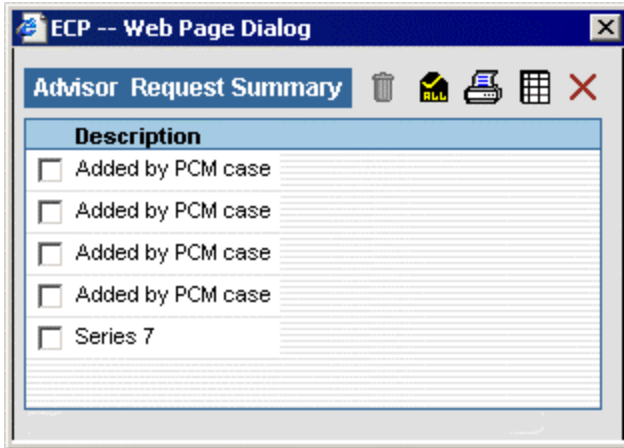
To recreate the underwriting requirements from a product's guidelines, click the **More Features** button and then select **Recreate Underwriting Requirement** from the drop-down list. A prompt will confirm deletion of the existing underwriting requirements.



To just append any new underwriting requirements, click the **No** button to reject the deletion. To remove the current requirements (except for the Await Approval and Replacement requirements created by PCM Workflows) for a pending case and replace them with all applicable requirements (defined in the product module) click the **Yes** button.

Advisor Request Button

To view the Advisor Request summary, select the **More Features** button and choose **Advisor Request** in the expanded menu. The **Advisor Request Summary** lists all of the requirements to be completed by the Advisor for that particular case including licenses, contracts, and appointments. These are automatically populated when the pending case is added.



Delivery Tab

The **Delivery** tab has four sections: **Premium Information**, **Miscellaneous Information**, **Policy Insured Summary**, and **Delivery Requirements**.

Pending Case - P823490 - Life - Joseph M. Ackerman - Preferred Life
- 20th Century Life Insurance

Summary | Detail | Underwriting | **Delivery** | Riders/Reinsurance | Activity/Mail | Letters/Documents | Misc Information

Premium Information		Miscellaneous Information	
Modal Premium	150.00	Delivery Mode	Monthly
Pay Method	Direct Bill	PAC Draw Day	30
Initial Cash Received	200.00	Add'l Cash Received	0
Balance		Excess Paid	50.00
Target	600.00	Excess Prem	100.00
Lump Sum	300.00	1035	200.00
Comm Modal		Comm Annlzd	0.00
		Annlzd Prem	1,800.00

Decision Date/Policy Date 10/10/2002
Delivery State/Pay To Date AK
Carrier Delivery Expiration 12/09/2002
Office Delivery Expiration

Policy Insured Summary

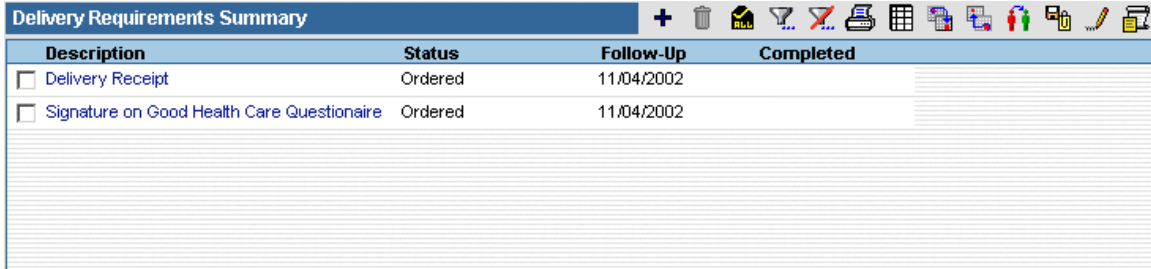
Contact Name
 Ackerman, Joseph

Delivery Requirements Summary

Description	Follow-Up	Completed
<input type="checkbox"/> testing requirements	12/08/2002	
<input type="checkbox"/> Delivery Receipt	11/04/2002	
<input type="checkbox"/> Signature on Good Health Care Questionnaire	11/04/2002	

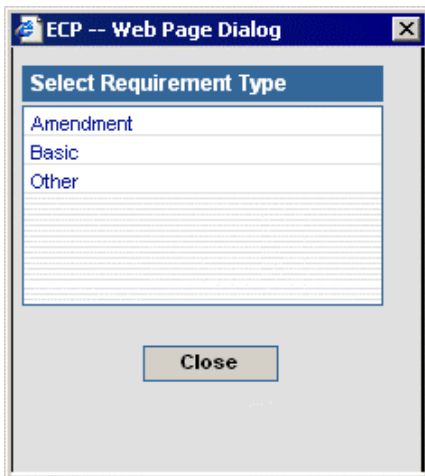
Delivery Requirements Summary

Any requirements to be fulfilled before a case goes inforce are tracked in the **Delivery Requirements Summary**. Delivery requirements are automatically populated by PCM based on age and face bandings.

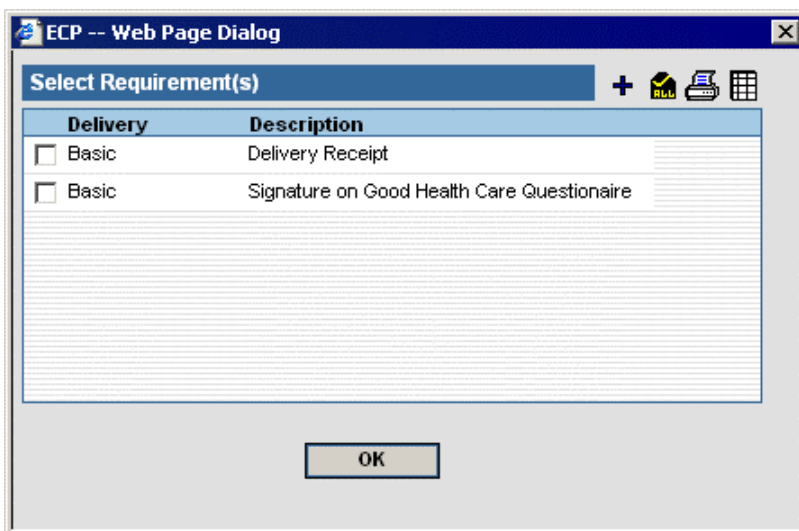


Description	Status	Follow-Up	Completed
<input type="checkbox"/> Delivery Receipt	Ordered	11/04/2002	
<input type="checkbox"/> Signature on Good Health Care Questionnaire	Ordered	11/04/2002	

To designate an additional underwriting requirement, click the **Add** button to open the **Select Requirement Type** dialog box.



Select a requirement type to open the **Select Requirement(s)** spreadsheet. This spreadsheet will list only the requirements related to the selected requirement type. The listed requirements are created in the **PCM Setup/Configuration**.



Select a requirement and click the **OK** button to open the **Delivery Requirement Detail** dialog box.

The screenshot shows a web browser window titled "ECP -- Web Page Dialog" displaying a "Delivery Requirement Detail" dialog box. The dialog box has a blue header bar with the title "Delivery Requirements". Below the header, the "Policy # P823490" is displayed. The "Select Insured Contact(s)" section includes a "Contact Name" field with a checked entry for "Ackerman, Joseph". The "Delivery Requirement Dates" section contains several fields: "Status" (For Your Records), "Status Date" (11/21/2002), "Required Of" (Carrier), "User Name" (Peter Stevens), "Follow-Up" (11/22/2002), and "Completed Date". There is also a "Form" field and a "View Image" button. The "Description" field contains "Delivery Receipt" and the "Remarks" field is empty. Both fields have a small "ABC" icon and a red checkmark. At the bottom of the dialog box are "OK" and "Cancel" buttons.

Riders / Reinsurance Tab

The **Rider/Reinsurance** tab has two summaries, the **Rider Summary** and the **Reinsurance Summary**.

Pending Case - P823490 - Life - Joseph M. Ackerman - Preferred Life - 20th Century Life Insurance

Summary | Detail | Underwriting | Delivery | **Riders/Reinsurance** | Activity/Mail | Letters/Documents | Misc Information

Rider Summary

Rider Name	Desc	Expiration Date	Status	Premium
<input type="checkbox"/> Disability Premium Waiver	If The Insured Becomes Disabled, He No Longer Has To Pay The Premium For This Life Insurance	10/02/2010	Pending	500.00

Reinsurance Summary

Ordered	Delivery Method	Received Date	Carrier Name
<input type="checkbox"/> 10/02/2002	Fax	10/04/2002	ABC Life

Rider Summary

The **Rider Summary** contains case-related rider information.

Summary | Detail | Underwriting | Delivery | **Riders / Reinsurance** | Activity / Mail

Rider Summary

Rider Name	Desc	Expiration Date	Status	Premium
<input type="checkbox"/> Disability Premium Waiver	If The Insured Becomes Disabled, He No Longer Has To Pay The Premium For This Life Insurance	10/02/2010	Pending	500.00

To add a rider to a case, click the **Add** button to open the **Policy Rider Detail** dialog box. All contacts with an Insured role in the **Interested Parties** section will display in the drop-down menu under **Insured Name**.

To view the list of Rider Products, click on the Rider Product hyperlink.

Reinsurance Summary

Reinsurance is a form of insurance that insurance companies buy for their own protection, “a sharing of insurance.” The reinsured reduces its possible maximum loss on either an individual risk or a large number of risks by giving a portion of its liability to another insurance company.

Reinsurance Summary			
Ordered	Delivery Method	Received Date	Carrier Name
<input type="checkbox"/> 10/02/2002	Fax	10/04/2002	ABC Life

To add reinsurance information, click the **Add** button.

The screenshot shows a dialog box titled "ECP -- Web Page Dialog" with a close button (X) in the top right corner. The main area is titled "Reinsurance Information" and contains several input fields:

- Policy #: P823490
- Carrier: ABC Life
- Ordered: 10/02/2002
- Delivery Method: Fax
- Received Date: 10/04/2002

At the bottom of the dialog are two buttons: "OK" and "Cancel".

Activity/Mail Tab

The **Activity/Mail** tab tracks case-related activities and e-mail sent.

The screenshot shows the "Activity/Mail" tab of a software application. The title bar reads "Pending Case - P823490 - Life - Joseph M. Ackerman - Preferred Life - 20th Century Life Insurance". Below the title bar are several tabs: "Summary", "Detail", "Underwriting", "Delivery", "Riders/Reinsurance", "Activity/Mail", "Letters/Documents", and "Misc Information".

The "Activity/Mail" tab is active and displays two sections:

Pending Case Activity

Date	Time	Status	Reason	Assigned To
<input type="checkbox"/>	10/05/2002 12:00PM	Done	Lunch with Joseph Ackerman to go over his concerns with the underwriting results.	Phil
<input type="checkbox"/>	10/02/2002 2:30PM	Done	Discuss Alternate Policy Options	Phil

E-Mail Information

Sent Date	Sender	Recipient	Post	Status	Subject
<input type="checkbox"/>	10/02/2002 11:54AM	Phil Anderson	Ackerman Joseph<JAckerman@bobbisnet.com>		Confirmation

Activity Summary

The **Pending Case** Activity summary tracks the case-related activities.

Pending Case Activity					
Date	Time	Status	Reason	Assigned To	
<input type="checkbox"/>	10/05/2002	12:00PM	Done	Lunch with Joseph Ackerman to go over his concerns with the underwriting results.	Phil
<input type="checkbox"/>	10/02/2002	2:30PM	Done	Discuss Alternate Policy Options	Phil

To add an activity for a case, click the **Add** button to open the **New Activity** dialog box.

ECP -- Web Page Dialog

Activity | Pattern

Contact	Activity Details
Name Joseph M. Ackerman Created By Peter Created On 10/21/2002 10:55AM	Date/Time 10/21/2002 Duration 60 Minutes Place Type/Sub Type Call Approach/New Seen Keywords Word Track
Participants Participant <input type="checkbox"/> Peter	Priority Normal Status Active Tracked <input checked="" type="checkbox"/> Private <input type="checkbox"/> Opportunity College Educatio
Reason	

OK Save Calendar Cancel

E-mail Information Summary

The E-mail Information summary tracks case-related activities and e-mail messages. The user can Compose, Forward, Reply, or Replay All to an e-mail message.

E-Mail Information						
Sent Date	Sender	Recipient	Post	Status	Subject	
<input type="checkbox"/>	10/02/2002 11:54AM	Phil Anderson	Ackerman Joseph<JAckerman@bobbisnet.com>		Confirmation	

Follow-Up Sub-Menu

To view the global Follow-Up spreadsheet, select **PCM** from the menu and choose **Follow-Up** in the expanded menu. All PCM Requirements with a Follow-Up date equal to the current date are viewed here. Use the **Select** drop-down list to choose from Underwriting Requirements, Delivery Requirements, Case-Related Advisor Requests (not including license, contract, appointment, and E&O), and Case-Related Activities.

Policy #	Insured Name	Description	Carrier Name	Follow-Up	Status	Status Date
<input type="checkbox"/> P823490	Ackerman, Kenneth	Telephone Interview	20th Century Life Insurance	11/06/2002	For Your Records	10/21/2002
<input type="checkbox"/> P823490	Ackerman, Kenneth	HOS	20th Century Life Insurance	11/06/2002	Scheduled	10/21/2002
<input type="checkbox"/> P823490	Ackerman, Kenneth	Blood Profile	20th Century Life Insurance	11/06/2002	Scheduled	10/21/2002

PCM Button

Select a requirement and click the **PCM** button to jump to the pending case for which the requirement belongs.

Change Date Button

Select a requirement and click the **Change Date** button to open the **Requirement Dates** dialog box. The requirement's **Status**, **Status Date**, **Required Of**, **Follow-Up** date, and **Completed Date** can be updated here.

Note: If the **Completed Date** field has a value entered in this dialog box and the **Follow-Up** field does not have a value entered, then the Follow-Up date for the requirement will be deleted.

Requirement Dates

Status: [Dropdown]

Status Date: [Text Field]

Required of: [Dropdown]

Follow-Up: [Text Field]

Completed Date: [Text Field]

OK Cancel

Reset Follow-Up Date Button

Select a record and click the **Reset Follow-Up Date** button to renew the Follow-Up date based upon the current date. The calculation used is entered in the **Carrier** module.

Change User Button

To assign the Primary Contact for the requirement to another SmartOffice user, select the requirement and click the **Change User** button.

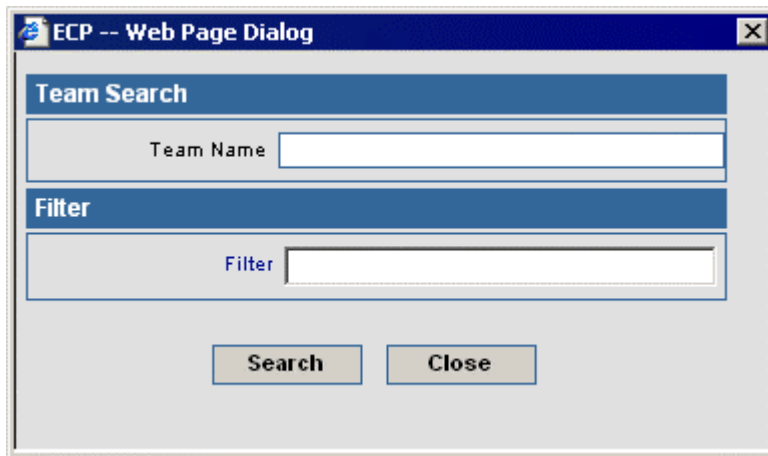
Compose E-mail Button

Select a requirement and click the **Compose E-mail** button to send an e-mail message to a related contact.

Teams

Team Search

To conduct a team search, select **PCM** from the menu and choose **Team** in the expanded menu to open the **Team Search** window.

The image shows a screenshot of a web application dialog box titled "ECP -- Web Page Dialog". Inside the dialog, there is a section titled "Team Search" with a text input field labeled "Team Name". Below this is a section titled "Filter" with a text input field labeled "Filter". At the bottom of the dialog, there are two buttons: "Search" and "Close".

- To display a summary spreadsheet for all teams, click the **Search** button without entering any search criteria.
- To display a summary spreadsheet based on specific criteria, enter a filter name.

Team Summary

The **Summary** tab displays a list of all the teams.

PCM Team Summary

Summary | Detail

Team Name	Full Phone
<input type="checkbox"/> Northern	(815) 487-2516
<input type="checkbox"/> Western Region	(213) 525-7845
<input type="checkbox"/> Central	(636) 408-539-0772

Team Detail

The **Detail** tab contains basic team information such as name, a linked business, and multiple phone numbers, addresses, e-mail addresses, and Web addresses.

PCM Team Detail - Central

Summary | Detail

Team Information	
Team Name	Central
Business Name	National Association Of Independent Life Brokerage Agencies

Phone List	
Type	Full Phone
<input type="checkbox"/> Business	(636) 408-539-0772#34
<input type="checkbox"/> Corporate Office	(565) 478-689-4567#78

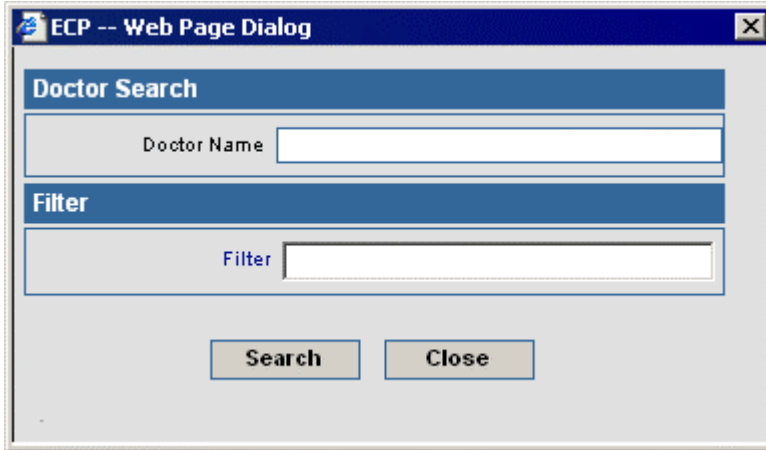
Address List			
Type	Street	City	Map
<input type="checkbox"/> Business	289, E Lake	Pasadena	

E-mail/Web Address List		
Type	Address	Modified On
<input type="checkbox"/> E-Mail	georg@nailbe.com	10/23/2002
<input type="checkbox"/> Web Site	www.neilbe.com	10/23/2002

Doctors

Doctor Search

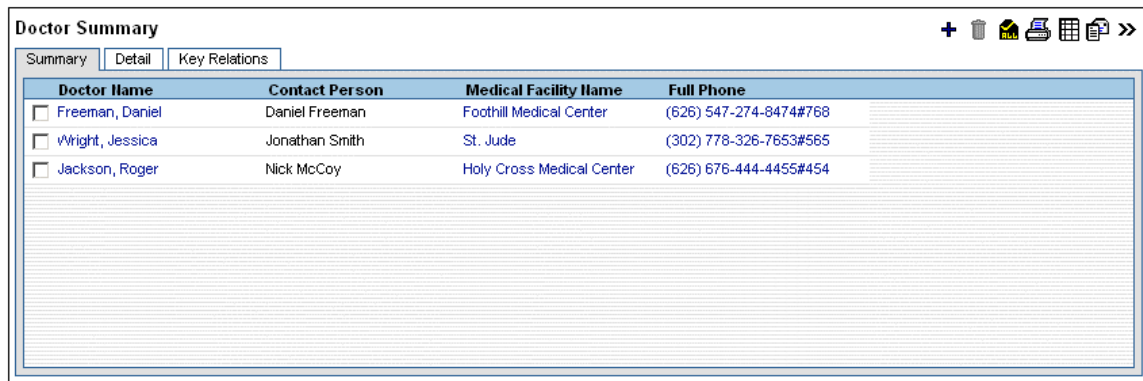
To search doctors, select **PCM** from the menu and choose **Doctor** in the expanded menu to open the **Doctor Search** window.



- To display a summary spreadsheet for all doctors, click the **Search** button without entering any search criteria.
- To display a summary spreadsheet based on specific criteria, enter a filter name.

Doctor Summary

The **Summary** tab displays a list of all the doctors.



The screenshot shows a window titled "Doctor Summary" with a toolbar containing icons for zoom, delete, print, and other actions. Below the toolbar are three tabs: "Summary", "Detail", and "Key Relations". The "Summary" tab is active, displaying a table with the following data:

Doctor Name	Contact Person	Medical Facility Name	Full Phone
<input type="checkbox"/> Freeman, Daniel	Daniel Freeman	Foothill Medical Center	(626) 547-274-8474#768
<input type="checkbox"/> Wright, Jessica	Jonathan Smith	St. Jude	(302) 778-326-7653#565
<input type="checkbox"/> Jackson, Roger	Nick McCoy	Holy Cross Medical Center	(626) 676-444-4455#454

Doctor Detail

The **Detail** tab contains basic team information such as name, a linked business, and multiple phone numbers, addresses, e-mail addresses, and Web addresses.

Doctor - Freeman, Daniel ⏪ ⏩ + 🗑️ 🖨️ 📄 >>

Summary **Detail** Key Relations

Personal Information			Address List		
Last Name	Freeman	Suffix	Type	Street	City
First Name	Daniel	Middle	<input type="checkbox"/> Business	3451 Foothill Blvd	Rosemead
Greeting	Daniel				
Medical Facility	Foothill Medical Center				
Contact Person	Daniel Freeman				

Type	Full Phone	Remarks	Type	Address	Modified On
<input type="checkbox"/> Business	(626) 547-274-8474#768		<input type="checkbox"/> E-Mail	freeman@fmc.com	10/25/2002

Doctor Key Relations

The **Key Relations** tab tracks any record of relations the doctor has with other contacts.

Doctor - Goosen, Michelle ⏪ ⏩ 🖨️ 📄 >>

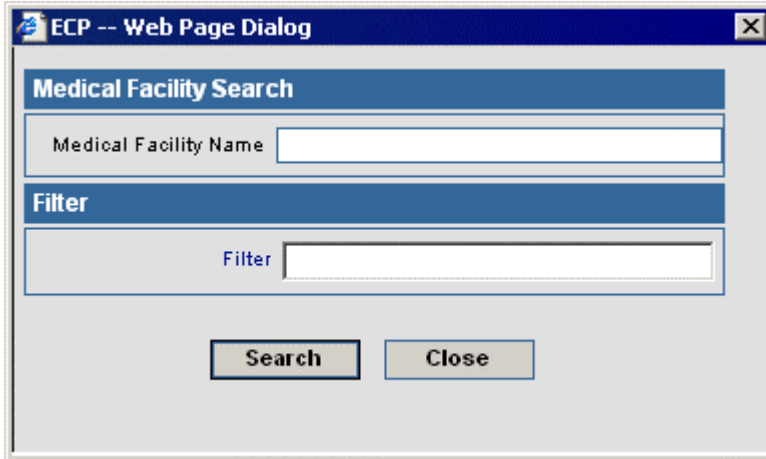
Summary **Detail** Key Relations

Relationship	Contact Name	Employer
<input type="checkbox"/> Fellow Employee	Anderson, Thomas	Anderson & Anderson
<input type="checkbox"/> Partner	vlllson, Sam	Applied American Life

Medical Facilities

Medical Facility Search

To search medical facilities, select **PCM** from the menu and choose **Medical Facility** in the expanded menu to open the **Medical Facility Search** window.

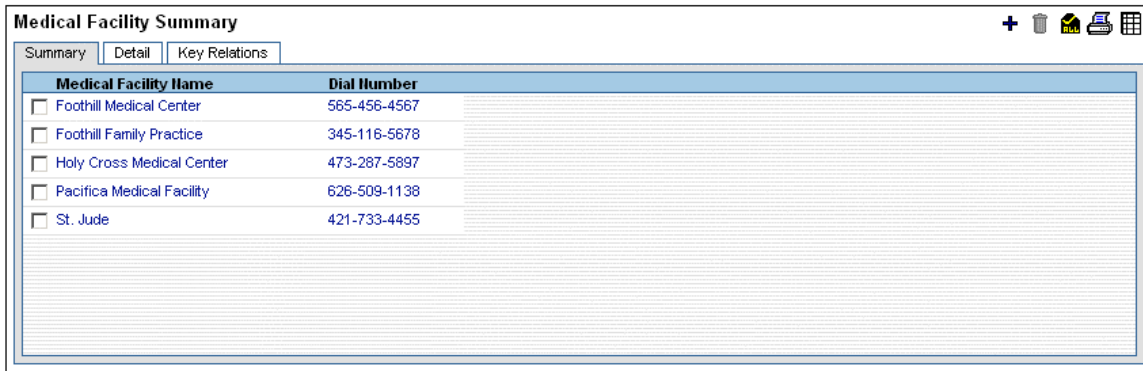


The screenshot shows a dialog box titled "ECP -- Web Page Dialog". Inside, there is a section titled "Medical Facility Search" with a text input field labeled "Medical Facility Name". Below this is a "Filter" section with a label "Filter" and another text input field. At the bottom of the dialog are two buttons: "Search" and "Close".

- To display a summary spreadsheet for all medical facilities, click the **Search** button without entering any search criteria.
- To display a summary spreadsheet based on specific criteria, enter a filter name.

Medical Summary

The **Summary** tab displays a list of all the medical facilities.



The screenshot shows a window titled "Medical Facility Summary" with three tabs: "Summary", "Detail", and "Key Relations". The "Summary" tab is selected. The window contains a table with the following data:

Medical Facility Name	Dial Number
<input type="checkbox"/> Foothill Medical Center	565-456-4567
<input type="checkbox"/> Foothill Family Practice	345-116-5678
<input type="checkbox"/> Holy Cross Medical Center	473-287-5897
<input type="checkbox"/> Pacifica Medical Facility	626-509-1138
<input type="checkbox"/> St. Jude	421-733-4455

Medical Facility Detail

The **Detail** tab contains basic medical facility information such as name, a primary contact, and multiple phone numbers, addresses, e-mail addresses, and Web addresses.

Medical Facility - Foothill Medical Center

Summary | Detail | Key Relations

Medical Facility Information

Medical Facility Name **Foothill Medical Center**
 Primary Contact **Katherine Smith**

Phone List

Type	Full Phone	Dial
<input type="checkbox"/> Business	(909) 456-4567#56	
<input type="checkbox"/> Temporary	(909) 523-4512#154	

Address List

Type	Street	City	Map
<input type="checkbox"/> Business	1220 Sunshine Ave	Jacksonville	

E-mail/Web Address List

Type	Address	Modified On
<input type="checkbox"/> E-Mail	katherine@fmc.com	12/12/2002

Medical Facility Key Relations

The **Key Relations** tab tracks any record of relations the medical facility has with other contacts.

Medical Facility - Foothill Medical Center

Summary | Detail | Key Relations

Business Relations

Role	Contact Name
<input type="checkbox"/> Employee	Smith, Katherine
<input type="checkbox"/> Owner	Abernathy, Brad

Records Shown: 2 Total Records: 2

Service Providers

Service Provider Summary

The Service Provider **Summary** tab displays a list of all the service providers.

Service Provider Name	Full Phone
<input type="checkbox"/> USB Medical Services	
<input type="checkbox"/> Foothill Family Practice	(626) 658-6547
<input type="checkbox"/> Arroyo Medical	
<input type="checkbox"/> Foothill Family Practice	(626) 658-6547
<input type="checkbox"/> Arroyo Medical	
<input type="checkbox"/> EMSI	(800) 426-9875
<input type="checkbox"/> Portamedic	(800) 631-7896

Service Provider Detail

The **Detail** tab contains basic service provider information such as name, a primary contact, and multiple phone numbers, addresses, e-mail addresses, and Web addresses.

Service Provider Information			
Service Provider Name PortaMedic			
Primary Contact			

Phone List			
Type	Full Phone	Dial	
<input type="checkbox"/> Business	(897) 576-438-9863#59		

Address List			
Type	Street	City	Map
<input type="checkbox"/> Business	952 Lime St.	Pasadena	

E-mail/Web Address List		
Type	Address	Modified On
<input type="checkbox"/> E-Mail	support@portamedic.com	12/12/2002
<input type="checkbox"/> E-Mail	customer_relations@portamedic.com	12/12/2002

Service Provider Key Relations

The **Key Relations** tab tracks any record of relations the medical facility has with other contacts.

Business Relations	
Role	Contact Name
<input type="checkbox"/> Accountant	Cunningham, John
<input type="checkbox"/> Consultant	Chung, Harold
<input type="checkbox"/> Partner	Buy, William

Records Shown: 3 Total Records: 3