DataXchange Side-by-Side Processing

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Proven in Practice℠

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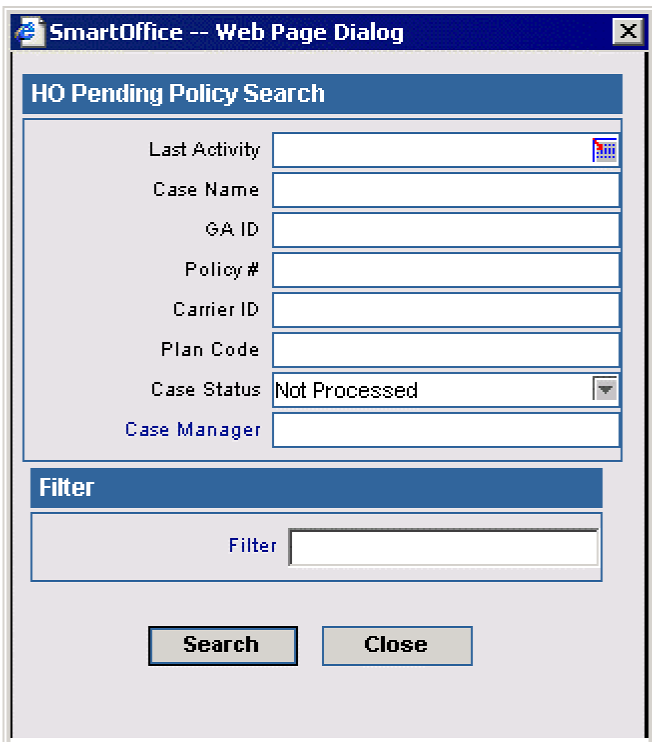
Table of Contents

HO Pending Case Status Downloads

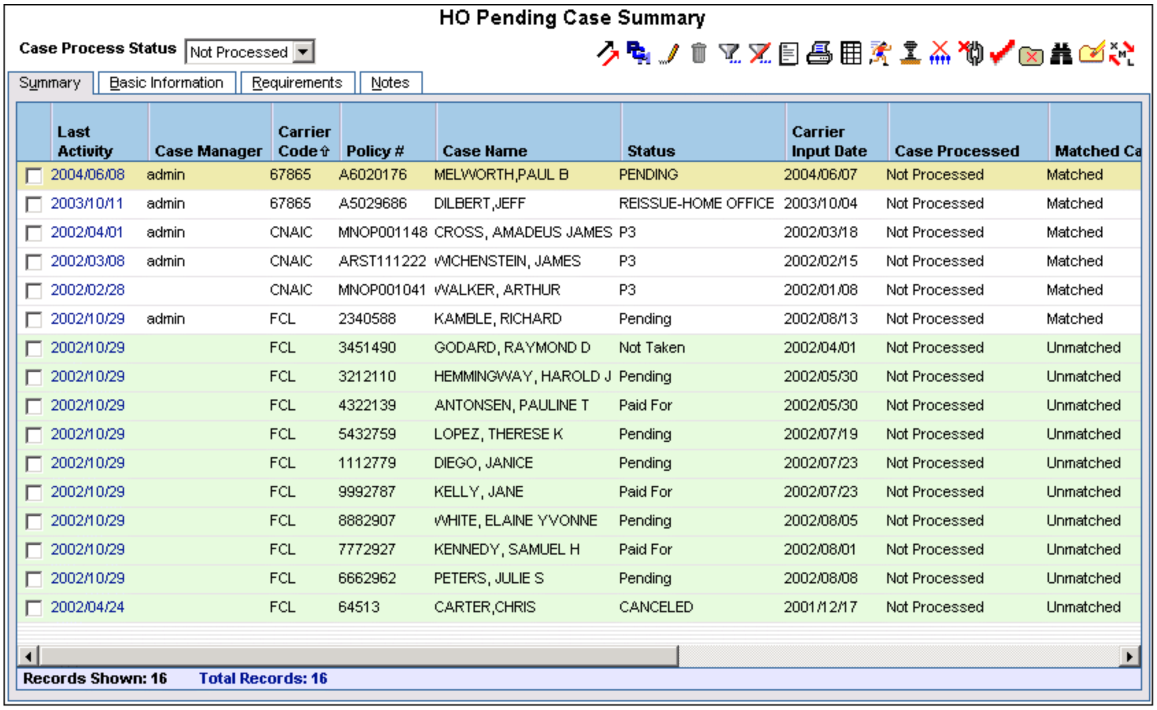
With DataXchange – HO Pending Case Status Downloads you can download updated requirement information directly from the carrier. Once you approve the updates through Side-by-Side Processing, SmartOffice updates the case requirements and you no longer need to go to the carrier's Web site for requirement updates.

HO Pending Case Summary

Select the **Pending Case** menu item and then select **HO Pending Case** from the expanded list to open the HO Pending Policy Search dialog box. By default, SmartOffice searches for HO Cases that have not yet been processed. It does not list your office's inputted cases. This is not the same as the Pending Case Summary.



Click **Search** to open the HO Pending Case Summary. This summary lists the downloaded case information from the Carrier (HO Cases). This summary does not display your manually inputted pending cases (Agency Cases) as the Pending Case Summary would show. Each HO Case needs to be linked to an Agency Case before Side-by-Side Processing can be performed. The HO Cases that are highlighted in green have not yet been linked to an Agency Case.


HO Pending Case Summary

Case Process Status: Not Processed

Summary | Basic Information | Requirements | Notes

Last Activity	Case Manager	Carrier Code	Policy #	Case Name	Status	Carrier Input Date	Case Processed	Matched Ca
2004/06/08	admin	67865	A6020176	MELWORTH,PAUL B	PENDING	2004/06/07	Not Processed	Matched
2003/10/11	admin	67865	A5029686	DILBERT,JEFF	REISSUE-HOME OFFICE	2003/10/04	Not Processed	Matched
2002/04/01	admin	CNAIC	MNOP001148	CROSS, AMADEUS JAMES	P3	2002/03/18	Not Processed	Matched
2002/03/08	admin	CNAIC	ARST111222	WICHENSTEIN, JAMES	P3	2002/02/15	Not Processed	Matched
2002/02/28		CNAIC	MNOP001041	WALKER, ARTHUR	P3	2002/01/08	Not Processed	Matched
2002/10/29	admin	FCL	2340588	KAMBLE, RICHARD	Pending	2002/08/13	Not Processed	Matched
2002/10/29		FCL	3451490	GODARD, RAYMOND D	Not Taken	2002/04/01	Not Processed	Unmatched
2002/10/29		FCL	3212110	HEMMINGWAY, HAROLD J	Pending	2002/05/30	Not Processed	Unmatched
2002/10/29		FCL	4322139	ANTONSEN, PAULINE T	Paid For	2002/05/30	Not Processed	Unmatched
2002/10/29		FCL	5432759	LOPEZ, THERESE K	Pending	2002/07/19	Not Processed	Unmatched
2002/10/29		FCL	1112779	DIEGO, JANICE	Pending	2002/07/23	Not Processed	Unmatched
2002/10/29		FCL	9992787	KELLY, JANE	Paid For	2002/07/23	Not Processed	Unmatched
2002/10/29		FCL	8882907	WHITE, ELAINE YVONNE	Pending	2002/08/05	Not Processed	Unmatched
2002/10/29		FCL	7772927	KENNEDY, SAMUEL H	Paid For	2002/08/01	Not Processed	Unmatched
2002/10/29		FCL	6662962	PETERS, JULIE S	Pending	2002/08/08	Not Processed	Unmatched
2002/04/24		FCL	64513	CARTER,CHRIS	CANCELED	2001/12/17	Not Processed	Unmatched

Records Shown: 16 Total Records: 16

Case Process Status

HO Cases have three process statuses. Not Processed indicates that the HO Case still needs to undergo side-by-side processing. Processed indicates that the HO Case has already undergone processing. Ignored indicates that it has not yet been processed but the user does not want it to remain on their Not Processed list – they are at least temporarily ignoring the case. The HO Pending Case Summary displays the Not Processed list by default; however, the user can look at Ignored, Processed, or HO Cases or All process statuses by selecting the appropriate option in the Case Process Status drop-down list located on the top-left of the HO Pending Case Summary.

Mark Processed Button

After a case has undergone complete side-by-side processing, it is automatically marked Processed. The Mark Processed button marks the selected HO Case processed even if it has not been completely processed. The case is removed from the Not Processed list and is added to the Processed list. This button is used when the case does not need to be processed and needs to be removed from the Not Processed list. Marking a case as Processed also deletes the HO requirement records from the side-by-side processing window.

Mark Ignored Button

The Mark Ignored button removes the selected HO Case from the Not Processed list and adds the record to the Ignored list so that the download ignores any further processing of the record. The user can look at all of their Ignored cases at a later date if they choose to. Ignored cases are eventually deleted by the user through the Clean-up button or by listing all Ignored records and using the Delete button.

Unlink Case Button

The Unlink Case button breaks the link between the selected HO Case and its corresponding Agency Case. This feature can be used if a user has accidentally linked a HO Case to the incorrect Agency Case.

Close Case Button

The Close Case button moves the HO Case to the Processed list. Using this button a second time on the same case moves it to the Not Processed list. An Agency Case could have been moved from a Pending case status to Inforce and therefore the HO Case is no longer needed. The user marks the HO Case as closed to keep a copy of it.

Delete Closed Case(s) Button

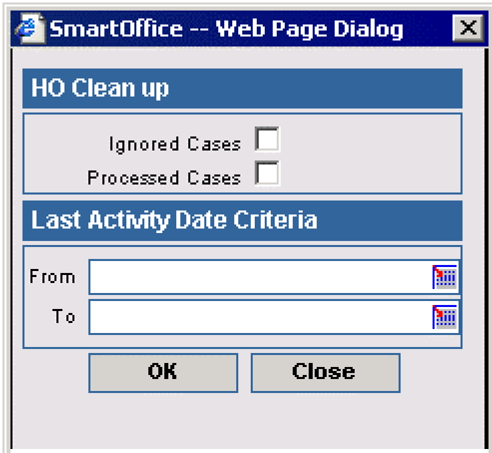
The Delete Closed Case(s) button permanently deletes any HO cases that were moved to the Processed list with the Close Case button. Any cases that were moved to the Processed list by another means will not be deleted.

HO Pending Case Search Button

The HO Pending Case Search button opens the HO Pending Policy Search dialog box where the HO Pending Case search can be re-executed. The Search button provides the ability to look for a specific set of records without leaving the HO Pending Case window.

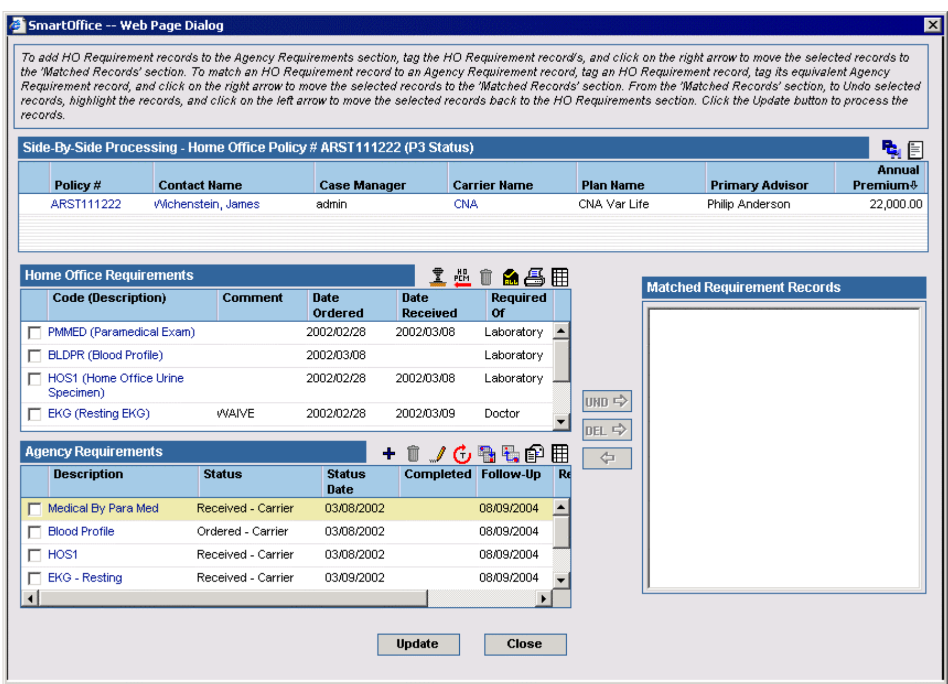
Cleanup HO Cases Button

The Cleanup HO Cases button deletes HO Pending Cases based on the entered criteria. Tagging the Ignored Cases option deletes any cases on the Ignored Status list where the last activity on that case falls within the specified date range. Similarly, tagging the Processed Cases option deletes any cases on the Processed Status list where the last activity on that case falls within the specified date range. No cases on the Not Processed Status list will be deleted. The date range is defined in the Last Activity Date Criteria section.

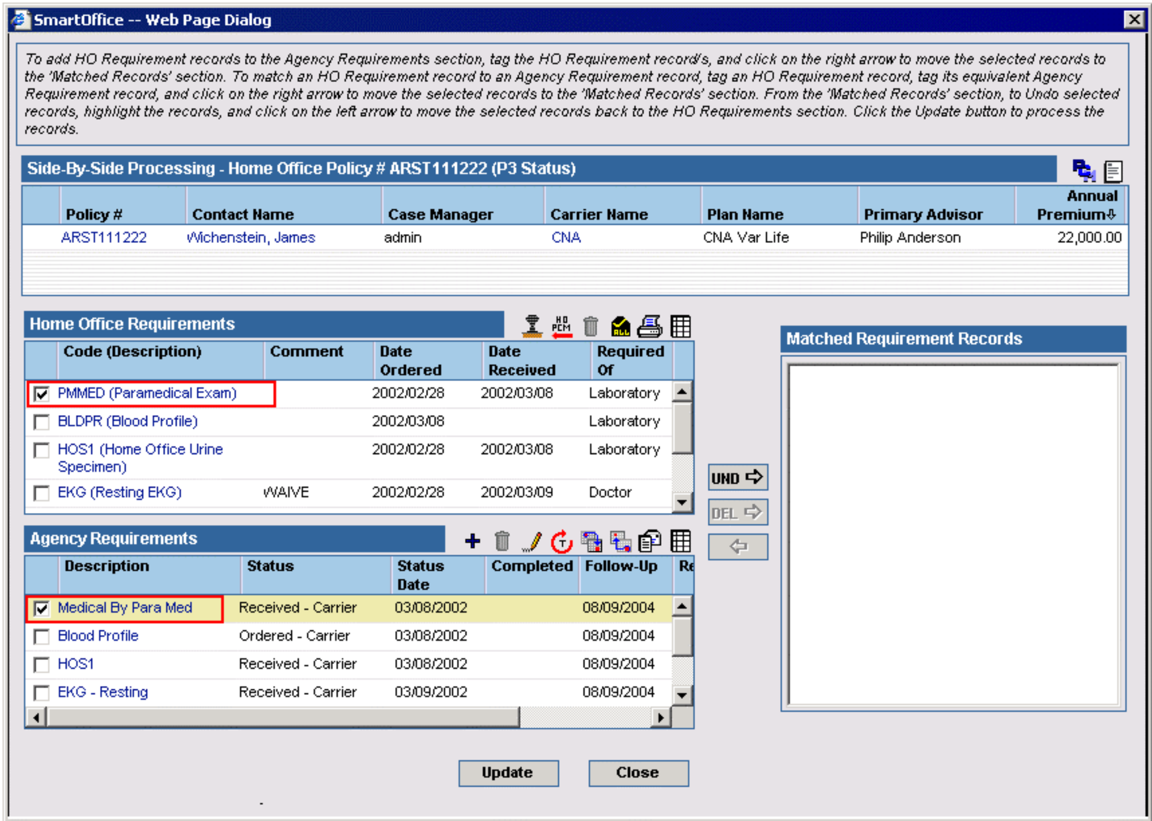


Side-by-Side Processing

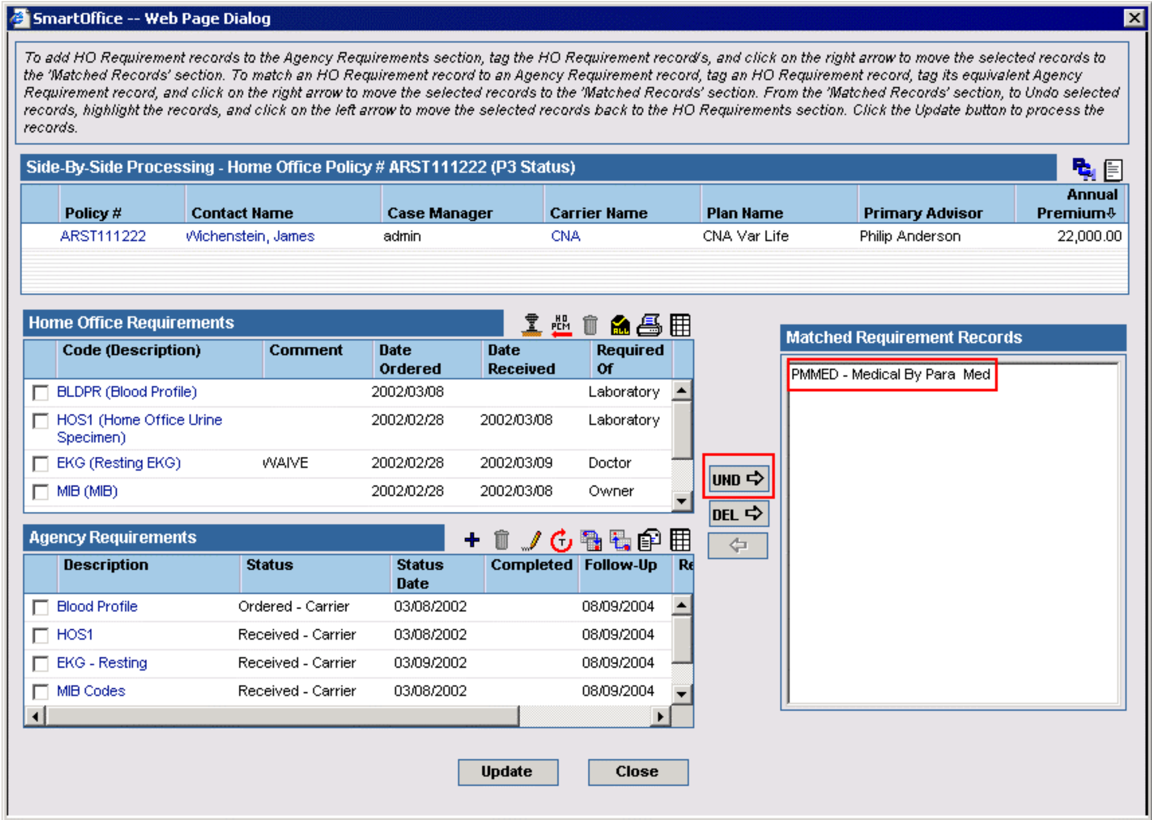
To process a linked HO Pending Case (in white), tag the case and then click the **Process** button to open the Side-by-Side Processing dialog box. The information in the Side-By-Side Processing spreadsheet is basic information about the case. The requirements listed in the Home Office Requirements spreadsheet are the updates from the carrier. The requirements listed in the Agency Requirements are the requirements that are currently in the linked Agency Case.



To approve the requirement changes, tag a requirement in the Home Office Requirements spreadsheet (only one) and then tag the corresponding requirement in the Agency Requirements spreadsheet (only one).



Then click the **UND** button if it is an underwriting requirement. If it is a delivery requirement, click the **DEL** button. This combines the selected Home Office Requirement and the corresponding Agency Requirement and moves it to the Matched Requirement Records section on the right.



Now you can tag another Home Office Requirement and its associated Agency Requirement.

If there is no Agency Requirement that corresponds with a Home Office Requirement, then only tag the Home Office Requirement and no Agency Requirement. Click the UND or DEL button to add this as a new requirement to the Agency Case.

Once you have finished approving each requirement change, click the **Update** button to make the changes in the Agency Case; or, click **Close** to cancel the changes.

Linking an Agency Case to a HO Case

SmartOffice links most of the HO Cases to a corresponding Agency Case automatically, but upon occasion you will need to link them manually. To link a HO Case to an Agency Case, tag the unlinked HO Case (in green) and then click the **Process** button to open the HO Pending Case Linking Options dialog box. To search for an existing Agency Case, select the **Match with the existing 'Agency PCM' record** option and then click **OK**. Search for the case. If the Agency Case does not exist, select the **Create new 'Agency PCM' record** option and then click **OK** to proceed through the PCM Add wizard.