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Policy Search Overview
Policy Search is available on Agency Web Portal (AWP) home page with advanced search capabilities to find customer policies and quotes across all Lines of Businesses from one single access point. At this time, Surety is not included in our search results.

Policy Search Widget Tool
Policy Search Widget Tool is displayed on the top right corner of AWP. Agency users will have a drop down for Agency Code based on User ID. Internal users are required to enter all 7 numeric characters for an “Agency Code” search.

Figure 1 - Policy Search Widget Tool - Agency and Internal Views

Policy Search Advanced Search Tool
Policy Search Advanced Search Tool is accessed from clicking the “Advanced Search” link located on the Policy Search Widget Tool.

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Searching by Line of Business for policies will include Personal Lines, Commercial Lines, and AgriBusiness. For Commercial Lines, we have included Worker’s Compensation.

**Figure 2 - Advanced Search View – Edit Criteria**

**Figure 3 - Search by Line of Business**
General Search Tips

- When searching with a street address, enter criteria without including “N”, “North”, “Street” or “ST”
- Do not use wildcard characters.
- Search is non-case-sensitive.
- Punctuation is optional.
- Results will display alphabetically by the insureds’ first name or business name.
- Results may include all insured Drivers and Additional Insured
- Sortable columns have an underlined title (Name, Symbol and Policy # and Status)
- Quotes created outside of AWP/WesCom will not be available within our Policy Search.
- Surety Quotes and Policies are not included in search results
- Searching by Policy # will return the most current policy results
- Searching by criteria other than Policy # may return policy/customer information from prior policy terms

Minimum Search Criteria

Policy searching is set up to require that the user provide a minimum set of search fields to avoid finding a large number of policies. For example searching using only address state, e.g. OH, PA, etc., will return too many policies. The system is currently only allow searches that contain minimum search criteria. The following are valid queries with the minimum fields required.

The following are examples of minimum search criteria.
- Enter a Last Name or Business Name
- Enter a Policy Number
- Enter Street Address and City
- Enter Street Address and Postal Code

Required Fields

I. Search Fields that Require Complete Entries

Within the Policy Search Widget and Advanced Search Tools, three field required complete information when search by that field type.

- When searching by policy number, the entire 7-digit number is required.
- When searching by agency code, the entire 7-digit number is required.
- When searching by zip code, the entire 5-digit number is required
Broad Search Results Tips

I. Enter Partial Information
Entering partial information will return results. When less information is entered into the policy search criteria fields, larger results will return. The only fields that allow partial search are name and address criteria fields. By partial search, this would include entering one complete word. Policy #, Agency Code and Zip Code all require the full numeric characters. Pagination will help users navigate when more than 10 results are returned.

II. Pagination
Pagination will help users navigate when more than 10 results are returned. On the far left side, Page “X” of “Y” will represent what page the user is on and how many are available. “X” is the page user is currently on and “Y” is how many pages are available.

Middle section “First, Previous, Next and Last” will by hyperlinks that take users to the identified page. If it is the user clicks “First”, the user will be taken to the first page of the paginated results. When the first page is selected, the navigation for “First” and “Previous” becomes bold and hyperlinks are removed. When the last page is selected, the navigation for “Next” and “Last” becomes bold and hyperlinks are removed.

The far right section displays “View All”, “Go to Page” and “Go” button. The “View All” hyperlink allows the user to view all results in one page view and scroll down. “Go to Page” allows the user to enter a number into the input field and click the “Go” button. Upon clicking the “Go” button, the user is taken to that page number entered. Each page will display ten results and the last page will display ten or less results.

Figure 4 – Pagination

III. How to Search by Page Number within Pagination
After receiving search results, users are able to search by page number from the pagination bar.

1. By typing in a page number of the pages available into the “Go to Page” input field
2. Clicking the “Go” button
3. or “Enter” keyboard button will go to the page entered

For example, entering “3” of 25 pages available and pressing the “Enter” keyboard button, will take a user to page “3”.

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Narrow Search Results Tips

I. Use Complete Words
AWP Policy Search uses word matching to locate relevant results. Enter complete words rather than partial words in search fields such as Name and Street Address.

When searching a customer’s last name or company name, typing in the full name will return less search results to sort through. For example, typing “Robinson” will find “Christopher Robinson”. However, typing “Rob” or “Chris” will not find “Christopher Robinson”. A search will find one word of many but a partial word search will not find the complete word.

Figure 5 - Example of Complete Name

II. Enter Address without “North”, “N”, “Street” or “St”
When searching by an address, enter the street address without using “N”, “North”, “ST” or “Street” and it will avoid multiple searches. For example, enter “123 Main”. Alternatively, searching by “123” or “Main” will return a larger set of results to sort through to find a policy.

Figure 6 - Example of Full Address

III. Entering Additional Criteria
Entering additional criteria such as Name, Street Address, and State will help narrow down results. Results will be returned that match the words entered, but not necessarily in the order they were entered. Entering more criteria will help when too many results are returned. Adding a state selection or zip code entry to a search will help users find the correct policy faster. If the name “John” is entered and “OH”, the results might exceed the 250 results limit and will require additional criteria to narrow down the search results.

Figure 7 – Example of Adding More Criteria
More Search Examples

I. Try Searching without “And” or “&” to Find Policies
If user needs to search for “Mary and John” or “Mary & John” or “MaryandJohn”, the best approach is to search by “Mary John” eliminating “and” or “&” in the search. If you search by one name and add state and zip code, it will help find correct results faster.

II. Try Searching with “PebbleCreek” or “Pebble Creek” to Find Policies
If a user needs to search for “PebbleCreek” or “Pebble Creek”, each search will need to be ran one at a time to find the matching policy. For example, “123 PebbleCreek” is one search and “123 Pebble Creek” is a second search.

III. No Results, Edit Search Results
If search results return with “No Results Found”, you are able to correct any typing errors made upon initial entry. For instance, if “Marta Smith” was entered and no results returned, criteria will remain available to be edited to avoid retyping “Martha Smith” and only typing the missing “h” needed to correct “Marta” to “Martha” and click the “Search” button.
No Results Found.

The following are examples of Search Tips:

- Enter an Insured’s First and Last Name or Business name
- Enter a Street Address without including “N”, “North”, “Street” or “ST”
- If you searched with Multiple Criteria, Enter Fewer Criteria

Name (Business or Person): Marta Smith

Policy#

Agency Code:

e.g. 2222222

e.g. 3408000

Street Address: 123 North Main Street

Line of Business: All Policies

e.g. PO Box 123 or 123 Main

City: Akron

State:

Zip Code:

Cancel | Clear | Search
## Policy Status
Policy status is pulled from two different databases that are known as Policy Administration System or PODS (5.3) and WesCom. Below is a reference chart to view where data is pulled from along with their definitions.

<table>
<thead>
<tr>
<th>Policy Administration System Status</th>
<th>WesCom Status</th>
<th>Policy Status Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application</td>
<td>Application</td>
<td>The policy is issued.</td>
</tr>
<tr>
<td>Cancelled</td>
<td>Cancelled</td>
<td>The policy is no longer in force. The policy may have cancelled before the term completed.</td>
</tr>
<tr>
<td>Pending Cancel</td>
<td>Pending Cancel</td>
<td>Status of a policy that remains unpaid beginning 15 days after the documented due date, but prior to the date of cancellation. A policy could be pending cancel regardless if it is 1st DNOC or a 3rd DNOC</td>
</tr>
<tr>
<td>Declined</td>
<td>Declined</td>
<td>The policy was not issued.</td>
</tr>
<tr>
<td>Errored</td>
<td>Erred</td>
<td>The policy failed to process successfully.</td>
</tr>
<tr>
<td>Expired</td>
<td>Expired</td>
<td>The policy is not in force. The current date is outside of the policy effective and expiration dates.</td>
</tr>
<tr>
<td>Ineligible</td>
<td>Ineligible</td>
<td>Upon an attempt to quote the policy, it is determined that it is not eligible due to underwriting rules.</td>
</tr>
<tr>
<td>Ineligible/ Submit</td>
<td>Ineligible/ Submit</td>
<td>Upon an attempt to issue the policy, it is determined that it is not eligible due to underwriting rules.</td>
</tr>
<tr>
<td>In Process</td>
<td>In Process</td>
<td>The quote has been submitted for issuance but has not been processed overnight.</td>
</tr>
<tr>
<td>New</td>
<td>New</td>
<td>Issue status for the first term of the policy.</td>
</tr>
<tr>
<td>Reinstated</td>
<td>Issued</td>
<td>Issue status after a policy was non-renewed/cancelled and then moved back to an in force policy status</td>
</tr>
<tr>
<td>Reissued</td>
<td>Issued</td>
<td>Issue status after a policy was non-renewed/cancelled and then moved back to an in force policy status</td>
</tr>
<tr>
<td>Renewed</td>
<td>Issued</td>
<td>Issued status for all terms after the first term of the policy</td>
</tr>
<tr>
<td>Locked</td>
<td>Locked</td>
<td>The quote or policy is no longer available to be quoted on WesCom and an internal user may be modifying this quote or policy.</td>
</tr>
<tr>
<td>Non-Renewed</td>
<td>Non Renewal</td>
<td>Displays when a policy will no longer be insured with Westfield after completion of the current term.</td>
</tr>
<tr>
<td>Pending Request</td>
<td>Pending Request</td>
<td>This quote is still in initial stages of quote entry. A quoted premium has not been provided yet.</td>
</tr>
<tr>
<td>Quoted</td>
<td>Quoted</td>
<td>Displays when a quote is successfully rated.</td>
</tr>
<tr>
<td>Referred / Submit</td>
<td>Referred / Submit</td>
<td>Upon an attempt to issue the policy, due to underwriting rules the policy needs to be reviewed by an underwriter.</td>
</tr>
<tr>
<td>Renewal</td>
<td>Renewal</td>
<td>Status shall display when a policy has been renewed but the term is not inforce yet as the term has not begun.</td>
</tr>
<tr>
<td>Submitted for Issue</td>
<td>Submitted for Issue</td>
<td>Displays when a change has been submitted to an issued policy.</td>
</tr>
<tr>
<td>Transferred</td>
<td>Transferred</td>
<td>Displays when a quote has been successfully bridged from an Agency Management System prior to the user making any modifications in WesCom. While status is displayed the user may make modifications on their Agency Management System and rebridge to WesCom and it will overwrite the data entirely.</td>
</tr>
</tbody>
</table>
Underwriter Review

Displays when the user has selected the option on WesCom to "Send to Underwriter" which shall send their quote to underwriting.

Will Refer

The policy was quoted but due to underwriting rules the policy needs to be reviewed by an underwriter.

Not Applicable

Not Applicable

### Personal Lines Policy Symbols

Personal Lines Policy symbols available for search include the following:

<table>
<thead>
<tr>
<th>Personal Lines</th>
<th>Policy Symbols</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wespak</td>
<td>WNP</td>
</tr>
<tr>
<td>Wespak Estate</td>
<td>WNE</td>
</tr>
<tr>
<td>Homepak</td>
<td>OFH</td>
</tr>
<tr>
<td>Homeowner</td>
<td>HOP</td>
</tr>
<tr>
<td>Auto</td>
<td>APV</td>
</tr>
<tr>
<td>Dwelling Fire</td>
<td>PDP</td>
</tr>
<tr>
<td>Defender Auto</td>
<td>NSA</td>
</tr>
<tr>
<td>Defender Financial Responsibility Bond</td>
<td>NSB</td>
</tr>
<tr>
<td>Umbrella</td>
<td>UXP</td>
</tr>
<tr>
<td>Boatowners</td>
<td>BTP</td>
</tr>
</tbody>
</table>

### Policy View Overview

Policy View screen provides high level policy information of customer information and related agency information at a glance with quick access to Wic-on-the-Web (WOW), WesCom and deeper dive links to customer Policies and DEC pages.

1. **Access Billing on WIC-on-the-Web (WOW)**

   Users are able to access billing details by clicking on the Billing Account provided on the Policy View screen. When the billing account includes a hyperlink (shown below), users will have access to Wic-on-the-Web. *Please note, billing information will not be available to view within Wic-on-the-Web after three years.*
II. Policy History

Policy History will only display the three most recent policy terms and is noted underneath the Policy History title. If users need history farther back from what is displayed, contact your underwriter or internal users will have access to the Policy Administration System (5.3) for more history. If it is a WesCom policy, policy history can be accessed in WesCom.

Figure 8 - Policy History

<table>
<thead>
<tr>
<th>Effective Date</th>
<th>Expiration Date</th>
<th>Change Effective Date</th>
<th>Policy Status</th>
<th>Total Premium</th>
<th>Payment Plan</th>
<th>Billing Status</th>
<th>Date Payment Due</th>
</tr>
</thead>
<tbody>
<tr>
<td>07/21/2015</td>
<td>07/21/2016</td>
<td>07/21/2015</td>
<td>Issued</td>
<td>$10450.00</td>
<td>Monthly</td>
<td>Past Due</td>
<td>08/21/2015</td>
</tr>
<tr>
<td>07/21/2014</td>
<td>07/21/2015</td>
<td>07/21/2014</td>
<td>Issued</td>
<td>$10450.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>07/21/2013</td>
<td>07/21/2014</td>
<td>07/21/2013</td>
<td>Issued</td>
<td>$9900.00</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

III. Agency-Billed Customers

For our Agency-Billed customers, policy view will appear differently

- Billing accounts will not be available. Instead, the words “Agency-Billed” will display where the billing account normally would appear in our Policy View.
  - Access to WOW will not be available
- Payment Status that will not display includes
  - Total Premium
  - Billing Status
Figure 9 - Policy View for Agency-Billed

Policy View – BOP 0022015

Customer Information

Named Insured:
Aladdin’s Restaurant

Mailing Address:
1232 Market Street, Suite A
Sharon, PA 16456

Policy Inception Date:
07/21/2010

Billing Account#:
Agency-Billed

Agency Information

Agency Name:
Morgan Agency

Agency Address:
1212 Main Street
Cuyahoga Falls, OH 44222

Office Phone#:
330-555-1200
Fax:
330-555-1212

IV. View Current Policy Tip

To ensure the current policy is being viewed, a message with a hyperlink is available to click the policy number that will take you to the current policy view. Below is an example of the message that reads: “Tip: To view current policy information, click the Policy #002215.”.

Error Messages

I. Examples of Error Messages

Error messages that will appear when more or less criteria are required include “No Results Found”; “Additional Criteria Required to Receive Any Results”; or “Results Exceeded the Maximum Allowed”. Each error message will provide searching tips. Examples are shown below.
Figure 10 - No Results Found

Policy Search

No Results Found.

The following are examples of searching tips:

- Enter an insured’s First and Last Name or Business name.
- Enter a Street Address without including “N”, “North”, “Street” or “ST”
- If you searched with multiple criteria, enter fewer criteria

Name (Business or Person): Mary Smith
Policy#: e.g. 2222222
Agency Code: e.g. 3408000
Street Address: 123 North Main Street
Line of Business: All Policies
City: Akron
State: [State Selection]
Zip Code: [Zip Code]

Search

Cancel  Clear

Figure 11 - Additional Criteria are Required to Receive Any Results

Policy Search

Additional Criteria are Required to Receive Any Results.

The following are examples of additional search criteria:

- Enter a Last Name or Business Name
- Enter a Policy Number
- Enter Street Address and City
- Enter Street Address and Postal Code

Name (Business or Person): Mary
Policy#: e.g. 2222222
Agency Code: e.g. 3408000
Street Address:
e.g. P.O. Box 123 or 123 Main
Line of Business: All Policies
City: [City]
State: [State Selection]
Zip Code: [Zip Code]

Search

Cancel  Clear
Figure 12 - Results Exceeded the Maximum Allowed

Additional criteria are required to receive any results. The following are examples of minimum search criteria:

- Enter a Last Name or Business Name
- Enter a Policy Number
- Enter Street Address and City
- Enter Street Address and Postal Code

Name (Business or Person):
Mary

Street Address:

City: State: Zip Code:

Policy#:
e.g. 2222222

Agency Code:
e.g. 340000

Line of Business:
All Policies

Search
Cancel Clear