



MEMORANDUM

DATE: August 31, 2006

TO: All Agents

FROM: Randy Wipf  
Director, Underwriting/Pricing

**RE: Policy expiration list now available on E-Quote**

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Agents have asked for a way to see their T.W.I.A. policy expiration list, and E-Quote now provides them this functionality!

Login to E-Quote, then place the cursor over "Policy" on the primary menu bar, and click on "Existing" from the drop down list. Doing so will provide you with a policy expiration search feature for your agency's policies. Simply fill in the expiration date fields for "from mm/dd/yyyy through mm/dd/yyyy" and click on the search button. Wait several seconds to allow the list to be generated. The results will automatically appear with up to 20 policies shown per screen page, detailing each policy's 1) Expiration date, 2) Status 3) Business type, 4) Insured name, 5) Property address, 6) City, 7) Policy total liability, and 8) Policy number. The default sort sequence shows the policies in date order; however, the list may be sorted by any of the column headings by clicking on the column heading desired. A second click on the heading will resort the list in reverse order by that heading's text.

The bottom right hand corner of the screen shows the number of policies in the list requested from the dates selected in the search. The search results are limited to 2000 policies at one time. Therefore, date ranges selected for the search should be narrow enough to accommodate 2000 or fewer policies. When more than 20 policies are generated by the search, clicking on each of the available page numbers displayed at the bottom of the screen will scroll the list to that series of policies.

The expiration list program can be used to poll your agency's policies on T.W.I.A.'s system, which have expired, or to determine what policies are going to expire in the upcoming days or months, and the present status of each. Please use "Click [here](#) for additional instructions" near the top of the program to see the definitions for information given under each column heading and further instructions on use of the program.

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