P&C INSURANCE SYSTEMS, INC.

Sampling of Vision Reports

Marketing Reports

Determine the effectiveness of your marketing strategy and your ability to close business; focus efforts to assist reaching desired retention ratios.

Submissions Log

This report is designed to allow monitoring of the pending or prior underwriting workload. The Submissions Report lists the status of all submissions that have been entered into the quote system within a specified time frame.

Open Quotes Report

This report lists all open quotes (neither accepted nor declined) and is designed to allow monitoring of the pending underwriting workload. Each quote version is displayed along with the expected effective date, expiration date and premium.

Policies Due for Renewal

This report assists marketing by providing a list of upcoming renewals. The Policies Due for Renewal Report lists all policies due to expire during a specific time frame.

Policy Expirations

This report facilitates underwriting analysis by providing a list of policies that expired during a user-specified time period.

Underwriting Reports

Analyze your exposure, the quality of your business, determine the allocation of your business by risk retention, and schedule your pending workload.

Payroll by Class Code Report

This report allows underwriting to analyze exposure by job class code. The Payroll by Class Code Report lists individual class payroll totals with subtotals by state and carrier.

Payroll by Insured Report

This report allows underwriting to analyze exposure by insured. The Payroll by Insured Report lists payroll for each class, within each location and policy.

Cancellations

This report facilitates underwriting analysis by providing a list of cancelled policies during a user-specified time period. The report displays cancellation specifics as well as reinstatement information, if available.

Reinstatements

This report facilitates underwriting analysis by providing a list of reinstated policies during a user-specified time period.

CSR Reports

Customer Service representatives have all the information at their fingertips to respond to agent and insured requests, from a single report.

Customer Service Report

This report is designed to allow the customer service representative to quickly ascertain the up-to-the-minute A/R status of a policy. The report initially presents a summary view displaying the total written premium, commission, cash receipts and suspended cash associated with a policy, resulting in a net A/R balance. The user may then choose to review the data in more detail, showing every transaction that made up the net A/R balance.

Financial Reports

Analyze your A/R, manage your commissions payable, track suspended cash and report to your reinsurers.

Insured Aging Report

This report is designed to allow analysis of slow-paying accounts by insured for direct bill accounts. The Insured Aging Report is similar to the Agent aging report, but is specifically targeted to "direct bill" accounts. The report lists all delinquent payments by the number of days late with the corresponding delinquent amount categorized as 1-30, 31-60, 61-90, and 91+ days past due. The report also displays any suspended cash, yielding a net A/R for the policy.

Agent Aging Report

This report is designed to allow analysis of slow-paying accounts by agency. The Agent Aging Report lists all delinquent payments by the number of days late with the corresponding delinquent amount categorized as 1-30, 31-60, 61-90, and 91+ days past due.

Applied Cash Report

This report allows the review of all premium cash transactions during a user-specified timeframe. The report identifies the invoices to which the cash was applied.

Cash Deposit Report

This report allows the review of all cash deposits (check batch) and the status of individual checks within the deposit, during a user-specified timeframe.

Suspended Cash Report

This report allows monitoring of cash placed in suspense (unapplied) status. This is an added protection to ensure that suspended cash will not go undetected. The Suspended Cash Report lists cash in suspense during a specific time frame.

Commission Accounts Receivable

This report is designed to allow the user to quickly ascertain the up-to-the-minute status of commissions for a policy. The report initially presents a summary view displaying the total written premium, policy commission amount; commissions paid and suspended cash associated with a policy, resulting in a net A/R – A/P. The user may then choose to review the data in more detail, showing every transaction that made up the net commission A/R – A/P.

Commissions Payable

This report is used to determine commission status for each invoice associated with a direct bill agency. The Commission Payable Report lists the full commission, the unpaid commission and the amount of unpaid commission eligible for disbursement. Disbursement eligibility may be determined on a written or paid basis. This report may also be used to manually generate checks when an integrated check writing system is not included in the client configuration.

Audit Reports

Schedule audits, monitor their status and follow up on any exceptions.

Scheduled Final Audits

This report facilitates monitoring the pending final audit workload. The Scheduled Final Audits report lists scheduled final audits for a specified date range.

Audits Due Report

This report facilitates the analysis and distribution of work related to upcoming premium audits. The Audits Due Report lists final audits due during a specified time frame for individual auditors.

Processed Final Audits Report

This report assists with monitoring the premium audit workload during a user-specified time period. The Processed Final Audits report lists processed final audits for a specified date range.

Overdue Audits Report

This report allows monitoring of premium audits that were not completed within the scheduled timeframe.

Management Reports

Monitor and manage the profitability of your company, document staff workloads, analyze your segments of business and provide indicators of any potential fraud.

Earned Premium Report

This report facilitates analysis and tracking of premium growth for the carrier. The Earned Premium Report presents a listing of inception to date (ITD) written premium, ITD earned premium, ITD billed premium and recognized earned premium for all policies by carrier.

Premium Analysis Report

This report lists policy level manual premium, standard premium, and estimated premium. These values are analyzed, compared and expressed as relative percentages of each other.

Premium by Policy Type Report

This report allows analysis of premium by the policy type (e.g., guaranteed cost, large deductible, etc.) The Premium by Policy Type report lists total estimated annual premium for the different policy types.

Policy Status Report

This report provides a management level view of individual policies. The report may be used as a first level of analysis by management to determine any potential issues requiring further exploration. The Policy Status Report lists "management level" data (e.g., insured, effective and expiration dates, policy status, rating plan, billing type, premium, etc.) for individual policies at a specific point in time.

In Force Policies

This report facilitates underwriting analysis by providing a list of in-force policies during a user-specified time period. Various policy details are displayed.

User Transaction

The User Transaction report is a management report that provides a list of transactions performed by individual system users. Each transaction is identified by type (new business, endorsement, cancellation, etc.).