Producer Portal – Pending Quotes

Pending quotes could be quotes that you have done, applications that you have started and not finished, or an application that you have submitted to underwriting for approval.

To access the pending quotes list, go to the dashboard and click pending quotes then pending quotes from the dropdown box.

In this picture, you can see all the pending quotes for your agency code.

On the top of the list there are multiple spots where you can use certain criteria to search for a specific pending quote. You can enter information into any of the boxes shown to narrow down your search. You can also search within a certain time a pending quote was last updated from. Enter the dates into the dropdown calendar. Once all information is entered, click Search to find a specific pending quote.

There are multiple pieces of information about a pending quote that is shown on this list. The information about the pending quote is listed horizontally. The Quote number is listed under Quote. You can see the Insured's name, the effective date, and type of business of the pending quote. Click load to open the selected quote.

Status means what is happening with the quote at that time. There are a few different status that can be applied to a quote.

Pending: Means that an application has been started and not submitted to Underwriting.

Pending Payment: Means that the application has been submitted, processed, and approved by underwriting. Only applies to Mortgage Full-Pay applications on which we are awaiting payment.

Producer Referral: Means that the application has been processed by underwriting but there was more information needed so they pushed the application back to the producer. You will now be able to load the application by clicking the load button.

Pending Referral: Means that you have submitted the application properly and it has been pushed to the underwriting queue. If you need to change or add something to this application DO NOT press copy. Since it has been sent to Underwriting, you will not have access to the load button. Please call or email us to make the necessary change.

Cancel: Means that this application has been cancelled by any system user and is no longer accessible.

Rejected: Means that the application has been rejected by Underwriting for a specific reason. A letter will be emailed and mailed to all interests on the application. If you need to resubmit this click the COPY button.

Term does not apply to a quote. 1 is the default for all quotes. User is the name of the person who created the quote/application. You can also view the date this quote has been updated.

If you need to start a new application or quote for the same Insured and Address you can save time by clicking Copy on the original quote or policy number. This helps to speed up the process when reapplying after a 4-year non-renewal or a cancellation for non-payment. If this function is used, please make sure to go though each tab to verify all details are correct or have stayed the same. The mortgage and any additional interest do not copy over so be sure to add them if this is applicable.
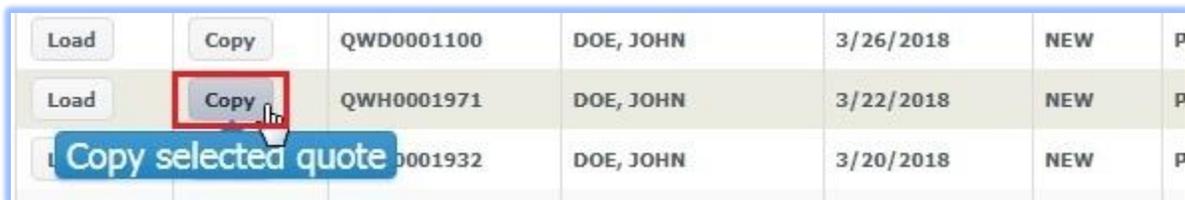
Load	Copy	QWD0001100	DOE, JOHN	3/26/2018	NEW	P
Load	Copy	QWH0001971	DOE, JOHN	3/22/2018	NEW	P
	Copy selected quote 0001932		DOE, JOHN	3/20/2018	NEW	P