




























































































Commercial Lines Drawer – House & Independent Primary Indexes	Secondary Indexes/Attributes	File Marks	Page Marks
<ul style="list-style-type: none"> <li>• Client Code</li> <li>• Client Name</li> </ul> <ul style="list-style-type: none"> <li>Commercial Lines               <ul style="list-style-type: none"> <li>Commercial Accounts                   <ul style="list-style-type: none"> <li>File (Client code, Client Name)                       <ul style="list-style-type: none"> <li>New Mail                           <ul style="list-style-type: none"> <li>New Mail</li> </ul> </li> <li>Core File                           <ul style="list-style-type: none"> <li>Financials</li> <li>Survey/Photo</li> <li>AOR</li> <li>Ex Mod</li> <li>Contract</li> <li>Cov Rec/Decl</li> </ul> </li> <li>Policy Term (Repeatable -Year)                           <ul style="list-style-type: none"> <li>General Correspondence (Repeatable as of 2/9/16)                               <ul style="list-style-type: none"> <li>Correspondence</li> </ul> </li> <li>Premium Allocations                               <ul style="list-style-type: none"> <li>Allocation</li> <li>Correspondence</li> </ul> </li> <li>Policy (Repeatable - Cov Code, Pol#, Effective date)                               <ul style="list-style-type: none"> <li>Policy Docs                                   <ul style="list-style-type: none"> <li>Policy</li> <li>Audit</li> <li>Endorsement</li> <li>Canc/Reinst</li> </ul> </li> <li>Policy Correspondence                                   <ul style="list-style-type: none"> <li>Correspondence</li> <li>Checklists</li> </ul> </li> <li>Accounting Discrepancies                                   <ul style="list-style-type: none"> <li>Correspondence</li> <li>Report</li> <li>Invoice</li> </ul> </li> </ul> </li> </ul> </li> </ul> </li> </ul> </li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Producer</li> <li>Servicer</li> </ul> <ul style="list-style-type: none"> <li>Certificates               <ul style="list-style-type: none"> <li>Certificates</li> <li>Correspondence</li> </ul> </li> <li>Submission/Quote               <ul style="list-style-type: none"> <li>Correspondence (Repeatable) as of 7/2015                   <ul style="list-style-type: none"> <li>Mkt Activity Log</li> <li>Correspondence</li> </ul> </li> <li>Market (Repeatable – Payee Name)                   <ul style="list-style-type: none"> <li>Correspondence</li> <li>Quote</li> </ul> </li> <li>Application</li> <li>Proposal/Summary</li> <li>MVR</li> <li>Loss History</li> <li>Binder Information</li> </ul> </li> <li>Contract               <ul style="list-style-type: none"> <li>Contract</li> <li>Correspondence</li> </ul> </li> <li>Accounting               <ul style="list-style-type: none"> <li>Authorization to Apply Credits</li> <li>Authorization to Chargeback</li> <li>Document ( Enter Description)</li> <li>Checks (visible to only Acct)</li> <li>Client Refunds</li> <li>Premium Finance</li> <li>AB NP Canc Req Form</li> </ul> </li> <li>Notes</li> <li>OCIP (Repeatable – Year)               <ul style="list-style-type: none"> <li>Enrollment (Repeatable) as of 11/2010                   <ul style="list-style-type: none"> <li>Enrollment Manual</li> <li>Correspondence</li> </ul> </li> </ul> </li> <li>Administration</li> </ul>	<ul style="list-style-type: none"> <li>VIP</li> </ul> <ul style="list-style-type: none"> <li>Project Info</li> <li>Correspondence</li> <li>Project Plan</li> <li>Master Enrollment               <ul style="list-style-type: none"> <li>Correspondence</li> <li>Certificate</li> </ul> </li> <li>Retro               <ul style="list-style-type: none"> <li>Adjustment</li> <li>Correspondence</li> <li>Plan</li> </ul> </li> <li>Claims               <ul style="list-style-type: none"> <li>Claims Occurrence (Repeatable – Loss Date)                   <ul style="list-style-type: none"> <li>Notice of Loss</li> <li>Correspondence</li> </ul> </li> <li>Review/Loss Runs                   <ul style="list-style-type: none"> <li>Claim Review</li> <li>Non Marketing Loss Run</li> </ul> </li> </ul> </li> <li>Loss Control               <ul style="list-style-type: none"> <li>Presentation</li> <li>Correspondence</li> </ul> </li> <li>Backscan               <ul style="list-style-type: none"> <li>Policy</li> <li>Marketing</li> <li>Certificate</li> <li>Core</li> <li>Claim</li> <li>Retro</li> <li>OCIP</li> <li>Misc</li> <li>Prospect</li> <li>Bond</li> <li>Bond client File</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Dec Page</li> <li>Rating Page</li> <li>Page Mark 2</li> <li>Location</li> <li>Page Mark 1</li> </ul>

Commercial Lines Drawer - House & Independent Primary Indexes <ul style="list-style-type: none"> <li>• Client Code</li> <li>• Client Name</li> </ul>	Secondary Indexes / Attributes	File Marks  VIP	Page Marks  Dec Page  Rating Page  Page Mark 2  Location  Page Mark 1
<ul style="list-style-type: none"> <li>Commercial Lines               <ul style="list-style-type: none"> <li>Benefits                   <ul style="list-style-type: none"> <li>File (Client Code, Client Name)                       <ul style="list-style-type: none"> <li>New Mail                           <ul style="list-style-type: none"> <li>New Mail</li> </ul> </li> <li>Prospect File                           <ul style="list-style-type: none"> <li>Consulting Proposal</li> <li>Notes</li> </ul> </li> <li>Core File                           <ul style="list-style-type: none"> <li>BAA</li> <li>Agreement</li> <li>AOR</li> </ul> </li> <li>Bargaining Agreements                           <ul style="list-style-type: none"> <li>Union Contracts</li> </ul> </li> <li>Year (Repeatable)                           <ul style="list-style-type: none"> <li>Compliance                               <ul style="list-style-type: none"> <li>Schedule A</li> <li>5500</li> <li>SAR</li> <li>SPD</li> <li>Notices</li> </ul> </li> </ul> </li> </ul> </li> </ul> </li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Line of Coverage (Repeatable-Carrier)               <ul style="list-style-type: none"> <li>COC</li> <li>Correspondence</li> <li>Report</li> <li>Letter</li> <li>Application</li> <li>Renewal</li> <li>Summary of Benefits</li> <li>Cancellation</li> <li>Claim – Benefits*</li> <li>Contract                   <ul style="list-style-type: none"> <li>Contract</li> <li>Amendments</li> </ul> </li> </ul> </li> <li>Marketing               <ul style="list-style-type: none"> <li>Carrier Quotes (Repeatable – Carrier)                   <ul style="list-style-type: none"> <li>Quote</li> <li>RFP</li> <li>Census*</li> </ul> </li> </ul> </li> <li>Pre-Renewal               <ul style="list-style-type: none"> <li>Agenda</li> <li>Notes</li> <li>Budget Projection</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Renewal               <ul style="list-style-type: none"> <li>Presentation</li> <li>Exhibit</li> <li>Agenda</li> <li>Notes</li> <li>Decision</li> <li>Open Enrollment                   <ul style="list-style-type: none"> <li>Material</li> </ul> </li> <li>Resume Coverage                   <ul style="list-style-type: none"> <li>Contacts</li> <li>Summary</li> <li>Service Calendar</li> </ul> </li> <li>BOHIS Backscan                   <ul style="list-style-type: none"> <li>Contract</li> </ul> </li> </ul> </li> </ul>	



Commercial Lines Drawer – House & Independent Primary Indexes <ul style="list-style-type: none"> <li>• Carrier Code</li> <li>• Carrier Name</li> </ul>	Secondary Indexes / Attributes <ul style="list-style-type: none"> <li>• Page Marks (Pre-defined)</li> </ul>	File Marks
<ul style="list-style-type: none"> <li> Commercial Lines               <ul style="list-style-type: none"> <li> Benefits Carrier Management                   <ul style="list-style-type: none"> <li> File (Carrier Code, Carrier Name)                       <ul style="list-style-type: none"> <li> New Mail                           <ul style="list-style-type: none"> <li> New Mail</li> </ul> </li> <li> Carrier (Repeatable – Carrier)                           <ul style="list-style-type: none"> <li> Correspondence</li> <li> Marketing Material</li> <li> Commissions</li> </ul> </li> </ul> </li> </ul> </li> </ul> </li> </ul>		

Surety Bonds Drawer – House & Independent Primary Indexes <ul style="list-style-type: none"> <li>• Client Code</li> <li>• Client Name</li> </ul>	Secondary Indexes / Attributes <ul style="list-style-type: none"> <li>• Producer</li> <li>• Servicer</li> </ul> Page Marks (Pre-defined)	File Marks
<ul style="list-style-type: none"> <li>  Surety Bonds               <ul style="list-style-type: none"> <li>  Surety Bonds                   <ul style="list-style-type: none"> <li>  File (Client Code, Client Name)                       <ul style="list-style-type: none"> <li>  New Mail                           <ul style="list-style-type: none"> <li>  New Mail                               </li> </ul> </li> <li>  Final Bonds (Repeatable)                           <ul style="list-style-type: none"> <li>  Bonds (Repeatable – Bond #)                               <ul style="list-style-type: none"> <li>  Final Bond                                   </li> <li>  Correspondence                                   </li> </ul> </li> </ul> </li> <li>  Account File                           <ul style="list-style-type: none"> <li>  Financials                               <ul style="list-style-type: none"> <li>  Fiscal Year End                                   <ul style="list-style-type: none"> <li>  Financial Statements                                       </li> </ul> </li> <li>  Interim                                   <ul style="list-style-type: none"> <li>  Financial Statements                                       </li> </ul> </li> <li>  Personal                                   <ul style="list-style-type: none"> <li>  Financial Statements                                       </li> </ul> </li> </ul> </li> <li>  Line of Authority                               <ul style="list-style-type: none"> <li>  Account Line                                   </li> </ul> </li> <li>  Bid Bonds                               <ul style="list-style-type: none"> <li>  Bid Bond                                   </li> </ul> </li> <li>  Work In Progress                               <ul style="list-style-type: none"> <li>  WIP Report                                   </li> </ul> </li> </ul> </li> </ul> </li> </ul> </li> </ul> </li></ul>	<ul style="list-style-type: none"> <li>  Credit               <ul style="list-style-type: none"> <li>  Bank Line of Credit                   </li> <li>  Credit Report                   </li> <li>  References                   </li> </ul> </li> <li>  Meeting Notes               <ul style="list-style-type: none"> <li>  Notes                   </li> </ul> </li> <li>  Account Information               <ul style="list-style-type: none"> <li>  Background                   </li> <li>  Questionnaire                   </li> <li>  Resume                   </li> </ul> </li> <li>  Correspondence               <ul style="list-style-type: none"> <li>  AOR                   </li> <li>  Correspondence                   </li> </ul> </li> <li>  Legal Documents               <ul style="list-style-type: none"> <li>  General Agreement of Indemnity                   </li> <li>  Trust                   </li> <li>  Collateral                   </li> <li>  Assignment                   </li> <li>  CD/ILOC                   </li> <li>  Set Aside                   </li> <li>  Promissory Note                   </li> <li>  Subordination Agreement                   </li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>  Accounting               <ul style="list-style-type: none"> <li>  Authorization to Apply Credits                   </li> <li>  Authorization to Chargeback                   </li> <li>  Document (Enter Description)                   </li> <li>  Checks (visible to only Acct)                   </li> <li>  Client Refunds                   </li> <li>  AB NP Canc Req Form                   </li> </ul> </li> <li>  Accounting Discrepancies               <ul style="list-style-type: none"> <li>  Correspondence                   </li> <li>  Report                   </li> <li>  Invoice                   </li> </ul> </li> <li>  Backscan               <ul style="list-style-type: none"> <li>  Client File                   </li> <li>  Final Bond                   </li> <li>  Client File A                   </li> <li>  Client File B                   </li> <li>  Client File C                   </li> <li>  Client File D                   </li> <li>  Client File E                   </li> <li>  Client File F                   </li> <li>  Client File X                   </li> </ul> </li> </ul>
		

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<ul style="list-style-type: none"> <li> Surety Bonds               <ul style="list-style-type: none"> <li> Surety Carrier Management                   <ul style="list-style-type: none"> <li> File (Carrier Code, Carrier Name)                       <ul style="list-style-type: none"> <li> New Mail                           <ul style="list-style-type: none"> <li> New Mail</li> </ul> </li> <li> Carrier (Repeatable – Carrier)                           <ul style="list-style-type: none"> <li> Marketing Materials</li> </ul> </li> </ul> </li> </ul> </li> </ul> </li> </ul>		