

## Francis Tagawa

---

**To:** Alvina Miyasato  
**Cc:** Irlene Torres  
**Subject:** RE: Premium Finance Company Notices - Sorting, Scanning, IR Tasks assignment

**From:** Alvina Miyasato  
**Sent:** Thursday, April 29, 2010 9:08 AM  
**To:** Atlas - C/L AMs; Atlas - C/L Bishop St AAs; Atlas - C/L Branch Office AAs  
**Cc:** Kathy Kano  
**Subject:** FW: Premium Finance Company Notices - Sorting, Scanning, IR Tasks assignment  
**Importance:** High

**EFFECTIVE IMMEDIATELY:**

Here is info on documents that are scanned or not scanned, and where it goes. This applies across the board to main office & branches, independents & house.

For independents: **Notice of Cancellation & Notice of Request to Insurer to Reinstate** are scanned by IR staff/Romela to CL indexers. Accounting does not want these documents. Indexers do not send task to Account Managers. Indexers send task to "Unassigned" in the cancellation workflow. Branches should print both docs into IR with task assigned to user "Unassigned" in the workflow "CI Cancellation Process" & step "AA/AM Canc Processing".

The pool of AAs at Bishop Street handle these documents following *current established procedures*. They inform agent, issue docs as authorized, and enter sagitta pathway coordinating cancel dates with carriers/brokers who honor and do not honor finance company docs.

We are currently in the process of revising the IR Internal Atlas workflows.

---

**From:** Irlene Torres  
**Sent:** Wednesday, April 28, 2010 12:54 PM  
**To:** Carolyn Modomo; Dean Zane; Susan Fontillas; irscan  
**Cc:** Lance Kawano; Teri Fabry; Alvina Miyasato; Nadine Cui; Patti Hoe  
**Subject:** Premium Finance Company Notices - Sorting

Carolyn, etal ~

I'm forwarding a list of the premium finance company notices and noted in the box if it should be scanned or not and where the documents go:

Premium Finance Company document	Scan in IR?	Where does it go?
Notice of Acceptance	Yes	Route in IR to Accounting only
Request for Policy Number	Yes	Route in IR to Accounting only
Notice of Cancellation	Yes	Route in IR to House or CL Ind based on AE/Producer
Notice of Request to Insurer to Reinstate	Yes	Route in IR to House or CL Ind based on AE/Producer
Payment Received or Payment Revision Letters– Ind Agt	No	Place hard copy in agent box
Payment Received or Payment Revision Letters – House	No	Trash hard copy
Notice of <b>Intent</b> to Cancel – Ind Agt	No	Place hard copy in agent box
Notice of <b>Intent</b> to Cancel – House	No	Place hard copy in AE in-tray (AA pool will handle)

I've asked Operations (Alvina/Teri) to provide sample documents so you can see what each one looks like. Remember, though, that actual documents will come from many different financing companies.

Dean – would you also share this listing with your subs as I've been told that they will look up Sagitta and write in the client code and Prod/AM names.

Once you've had a chance to go through this email, I'll stop by the mailroom to go over it with you. The main purpose of handling this in the mailroom is that it saves a lot of time and handling in Operations & Accounting if we spend a little extra time & effort in the mailroom sorting it, so your help is essential to everyone's efficiency.

Let me know right away if you have any questions.

*Irene Torres*

Unit Manager, Information Technology

**Atlas Insurance Agency**

1132 Bishop Street, Suite 1600

Honolulu, HI 96813

\*\*\*\*\*

2009 Best Places to Work

Please visit: [www.atlasinsurance.com](http://www.atlasinsurance.com)

**PS – Teri Alvina and Patti, can you share the matrix with the appropriate staff in your department.**