

# Document Management

## Scanning Instructions for Personal Lines

### ITEMS NOT TO BE SCANNED:

1. Publications: magazines, trade papers,
2. Items marked "Personal & confidential" on envelope
3. Checks (follow current check log procedure)
4. Junk mail: advertising flyers, class/seminar notices, catalogues
5. \*RENEWAL POLICIES/CANCELLATIONS/REINSTATEMENTS from:
  - a. First except OL&T and Commercial Umbrella
  - b. Island/Tradewind, etc except OL&T & Commercial Umbrella
  - c. Fairmont except OL&T
  - d. Progressive
  - e. Dongbu except agency billed, non-downloaded policies
6. RENEWAL POLICIES from Zephyr & ICAT – place agent's copies in pidgeon-hole and agency copy to AA.
7. \*Non-payment NOCs issued on Direct Bill policies except from RLI and Zephyr.
8. DB Premium Invoices and Premium reminders – send to agent (same as current procedure)

\*Place agent's copies in pidgeon-hole.

### Special Routing Instructions:

- Original policy and other policy documents must be routed to appropriate department.