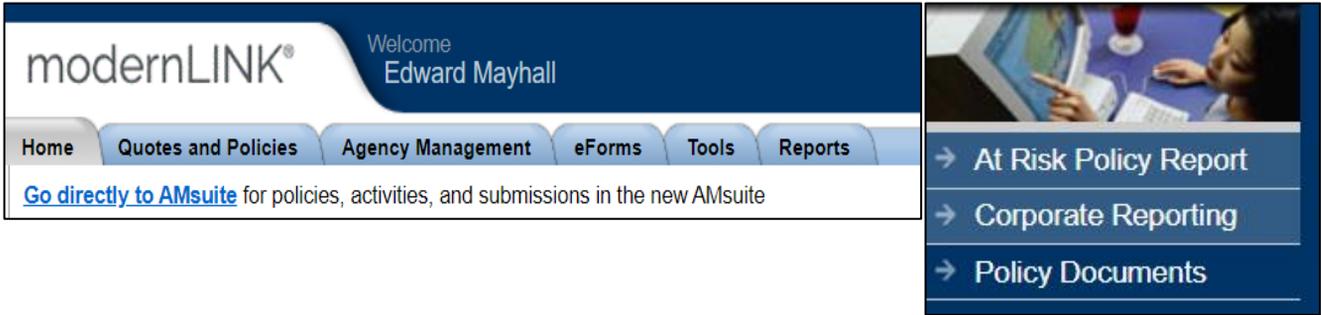


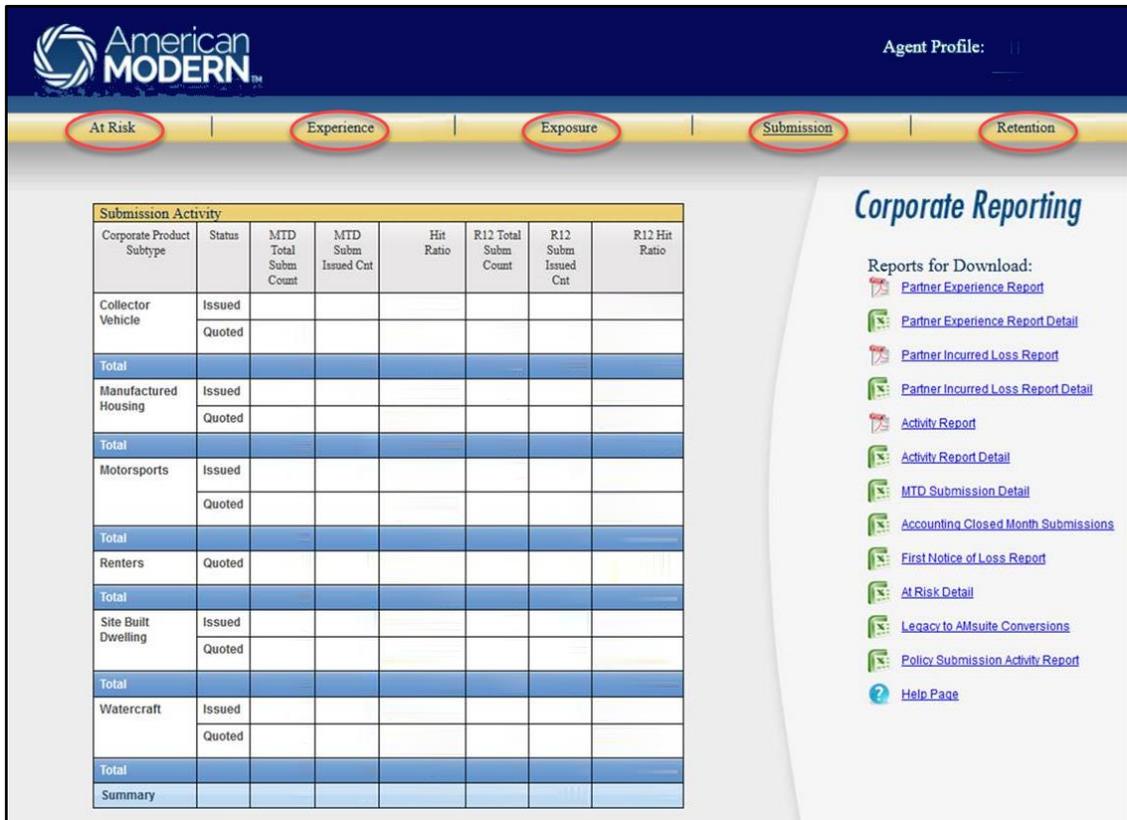
# Reports Portal

# How to access Reports Portal

1 Click on the Reports Tab on the Home page of modernLINK™, and then click on Corporate Reporting on the left side navigation toolbar



2 The Navigation links on the Corporate Reporting home page allow you to see your At Risk, Experience, Exposure, Submission, and Retention results in graph or chart format.



Submission Activity							
Corporate Product Subtype	Status	MTD Total Subm Count	MTD Subm Issued Cnt	Hit Ratio	R12 Total Subm Count	R12 Subm Issued Cnt	R12 Hit Ratio
Collector Vehicle	Issued						
	Quoted						
Total							
Manufactured Housing	Issued						
	Quoted						
Total							
Motorsports	Issued						
	Quoted						
Total							
Renters	Quoted						
Total							
Site Built Dwelling	Issued						
	Quoted						
Total							
Watercraft	Issued						
	Quoted						
Total							
Summary							

### Corporate Reporting

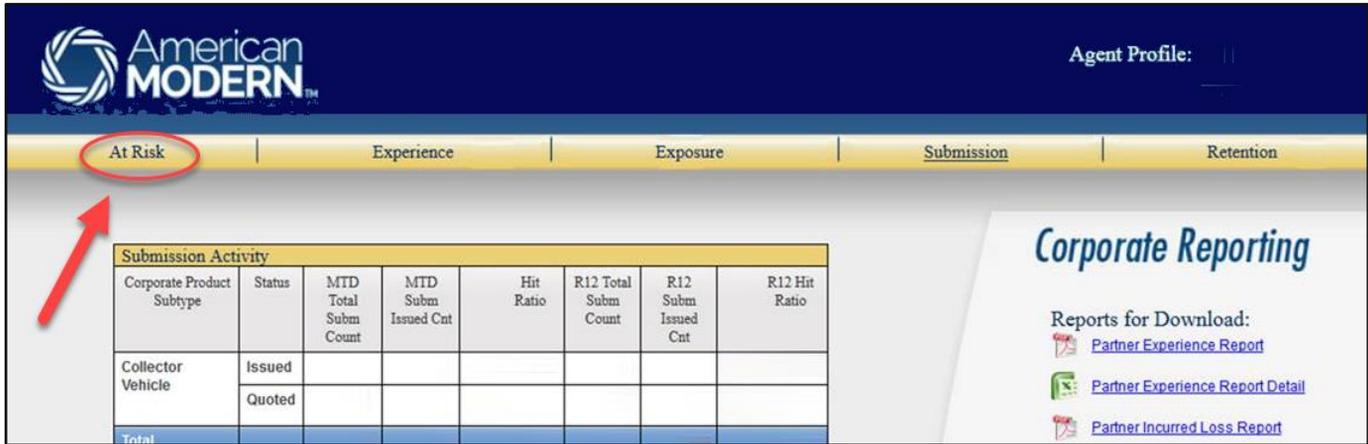
Reports for Download:

-  [Partner Experience Report](#)
-  [Partner Experience Report Detail](#)
-  [Partner Incurred Loss Report](#)
-  [Partner Incurred Loss Report Detail](#)
-  [Activity Report](#)
-  [Activity Report Detail](#)
-  [MTD Submission Detail](#)
-  [Accounting Closed Month Submissions](#)
-  [First Notice of Loss Report](#)
-  [At Risk Detail](#)
-  [Legacy to AMsuite Conversions](#)
-  [Policy Submission Activity Report](#)
-  [Help Page](#)

# Reports Portal

# How to access Reports Portal

3 modernLINK and AMsuite® At Risk are both viewable within the At Risk tab in the same list.



Corporate Product Subtype		Status	MTD Total Subm Count	MTD Subm Issued Cnt	Hit Ratio	R12 Total Subm Count	R12 Subm Issued Cnt	R12 Hit Ratio
Collector Vehicle	Issued							
	Quoted							
Total								

## About Graphs and Charts

**Experience** – Provides a summary of Year-to-Date and Prior Year-to-Date written premium, Incurred Losses, Loss Ratio, and Growth percentage by product.

**Exposure** – Displays Policies-In-Force by product, and by Rating State. You can also view the Total (insured) Limit by State.

**Submissions** – Displays the total number of quotes for the month by product, total number of quotes issued for the month by product, and total number quoted and issued on a rolling 12 month basis.

**Retention** – View your agency’s retention results by month, year-to-date, rolling 12 month and by product.

# Reports Portal

# How to access Reports Portal

## About Reports

Monthly reports are provided on a rolling basis

Partner Experience Report

Partner Incurred Loss Report

Quote Detail Report

Activity Report

Security Report

Prior Month Submission Detail

Daily reports (rolling five days) MTD Submission Detail At Risk

These reports are available on the right hand side of the page under,

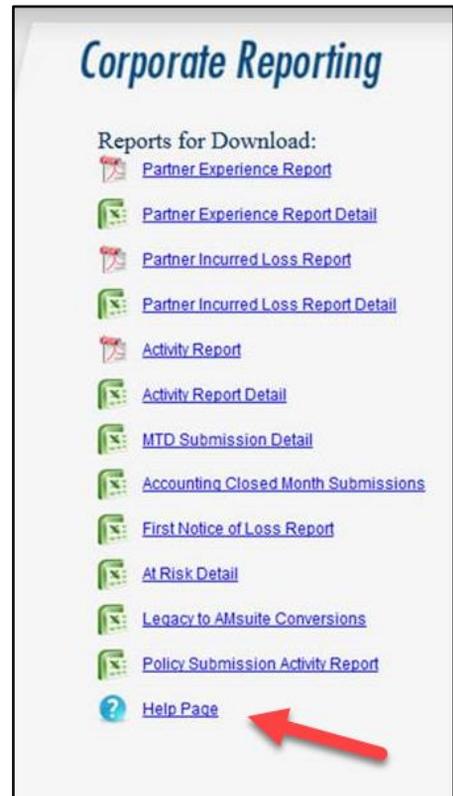
Reports for Download

An Excel file will open with your report.

## About Reports

Help is always available at the bottom of the list of Reports for Download on the right side of the page.

Historical Reports are available to give you access to prior months data in the current calendar year.



## Reports Portal

## How to access Reports Portal

### Information in the Legacy to Amsuite Conversion Report

This report contains 2 tabs, the first tab holding a 28 columns report and the second tab containing FAQ information about the terms used in the report. (see below):

About the data in this report:

**Billing Type and Pay Plan Code** belong to the Amsuite policy, and are not necessarily carried over from the ModernLINK policy. Look for policies with an "invoice" billing type and payment status as "Payment Due" or "Cancelled", as these policies may have been set up for recurring payment in ModernLINK, but could be on invoice billing in Amsuite. If the Billing Type or Pay Plan Code is empty or "See policy in Amsuite", use the Policy Number to verify billing contact details and payment status in Amsuite before contacting.

**Previous Policy Number** shows the inforce policy that will be converted to Amsuite. This is the inforce policy in ModernLINK.

**Policy Number** shows the conversion policy generated in Amsuite. Use this number to locate the conversion policy in Amsuite.

**Corporate Policy Type** indicates the unique type of insurance policy or contract of the Amsuite policy.

**Rating State Abbreviation** represents the two-character state abbreviation for the state whose rates, forms, and rules were utilized in determining policy premium and policy output for the Amsuite policy.

**Policy Effective Date** shows the date that the Amsuite policy is scheduled to be inforce. As this date approaches, urgency increases for completing the conversion process.

**Billing Payment Status** Provides the status of payments made toward the Amsuite renewal policy. Identifies ModernLINK policies converting to Amsuite upon renewal that are at risk of cancellation due to non-payment.

**In order of highest to lowest urgency:**

1. **Cancelled** - Agents can work with policyholder up to 15 days after the Amsuite conversion policy's effective date to reinstate a policy that was cancelled for non-payment as a final attempt to retain business that was lost during the conversion process.

2. **Premium Due** - No payment received to date. Contact policyholder to assist with conversion process.

3. **Partial Payment** - Some payment received, but policyholder may need assistance completing the conversion process.

4. **Paid** - These policies are the least urgent, as a decision and payment have been made.

**Policy Cancellation Date and Reason** shows the date and reason the Amsuite conversion policy was terminated. Look for policies on 6-pay invoice that have had no payment received. These policyholders may have been dropped from recurring payments and need to submit new forms.

**Remaining Balance Amount** shows the amount of the first payment required for the Amsuite policy to go into effect. (This is not necessarily the premium amount for the entire term.)

**Conversion Offer Premium Amount** shows the written premium amount offered to the policyholder based on converting the policy to Amsuite and applying the rating rules used in that system. Agent can track premium amounts booked and lost around conversion policies listed in the report.

**Premium Prior to Conversion** shows the written premium amount the policyholder paid for the latest policy term in ModernLINK.

**Conversion Offer Premium Change Amount** shows the difference between the ModernLINK policy and the Amsuite policy.

# Reports Portal

# How to access Reports Portal

## Legacy to AMsuite Conversion Report Sample

Below is a sample of the columns in the report.



Showing conversion policies with effective date on or between Jul 16 2019 and Sep 21 2019, as of Jul 31 2019  
**Your Policies in Conversion**

This page shows your policies where an offer to convert to AMsuite was sent to the policyholder, whose coverage will soon expire if not accepted by making a payment.  
 Use this list to assist policyholders who may need help with completing the conversion process and making a payment.  
 Policies that have not received sufficient payment and policies cancelled for non-payment most urgently need your attention. Payment may still be collected for the new AMsuite policy up to fifteen days after the Policy Effective Date.

**Process Step: Offer Sent**

Contracted Agency Assigned Identifier	Contracted Agency Organization Name	Contracted Agency Office Phone Number	Producing Agent Assigned Identifier	Agent Name	Producing Agent Office Phone Number	Previous Policy Number

**Total Number of Policies**

© 2019 American Modern Insurance Group, Inc. This report may contain information that is Confidential, Critical, Restricted or Sensitive, and is intended solely for the internal use of the producer named above. No other use is permitted and all other rights are reserved.  
 Jul 31, 2019 9:54:57 PM

Policy Number	Corporate Policy Type Name	Rating State Abbreviation	Policy Effective Date	Billing Payment Status	Policy Cancellation Date	Policy Cancellation Reason Name	Remaining Balance Amount

Conversion Offer Premium Due Date	Conversion Offer Premium Amount	Premium Prior to Conversion	Conversion Offer Premium Change Amount	Billing Type Name	Pay Plan Code

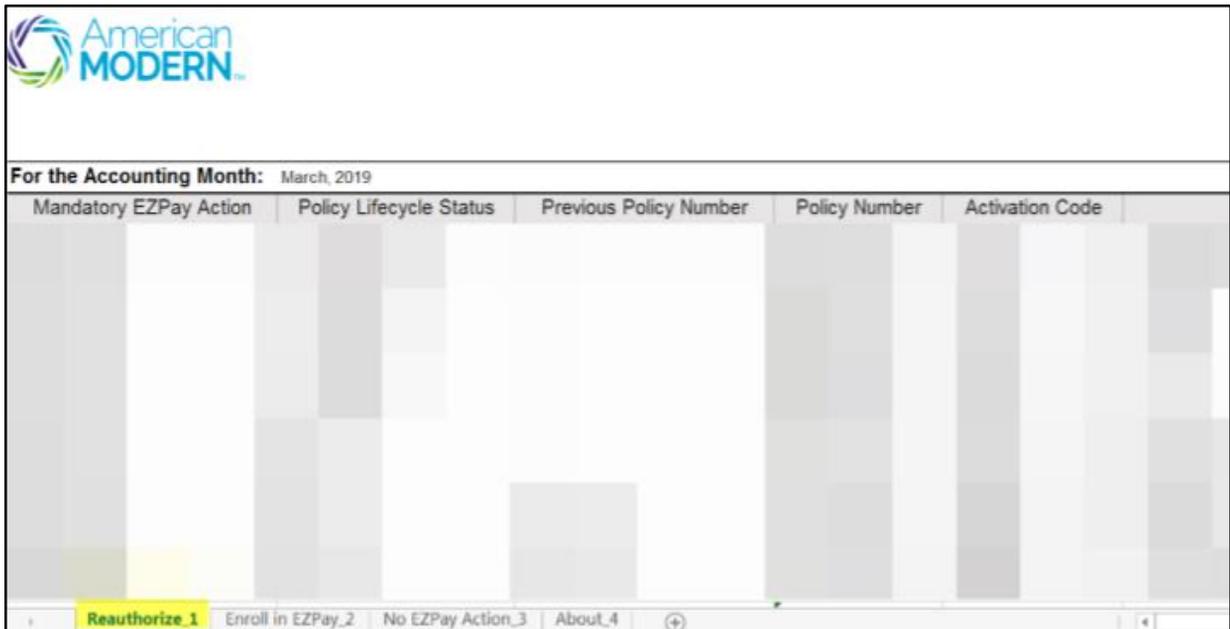
Named Insured Name	Named Insured Mailing Address 1	Named Insured Mailing City	Named Insured Mailing State Abbreviation	Named Insured Mailing Zip Code	Named Insured Primary Phone Number	Named Insured Primary Email

# Reports Portal

# How to access Reports Portal

## EZPay Status Report

This monthly report will show you which customers are on EZPay automatic payments and those that are not. Each policy in this report will have a specific recommended action to be completed. **Note: This report will not contain policies that have cancelled or expired.**



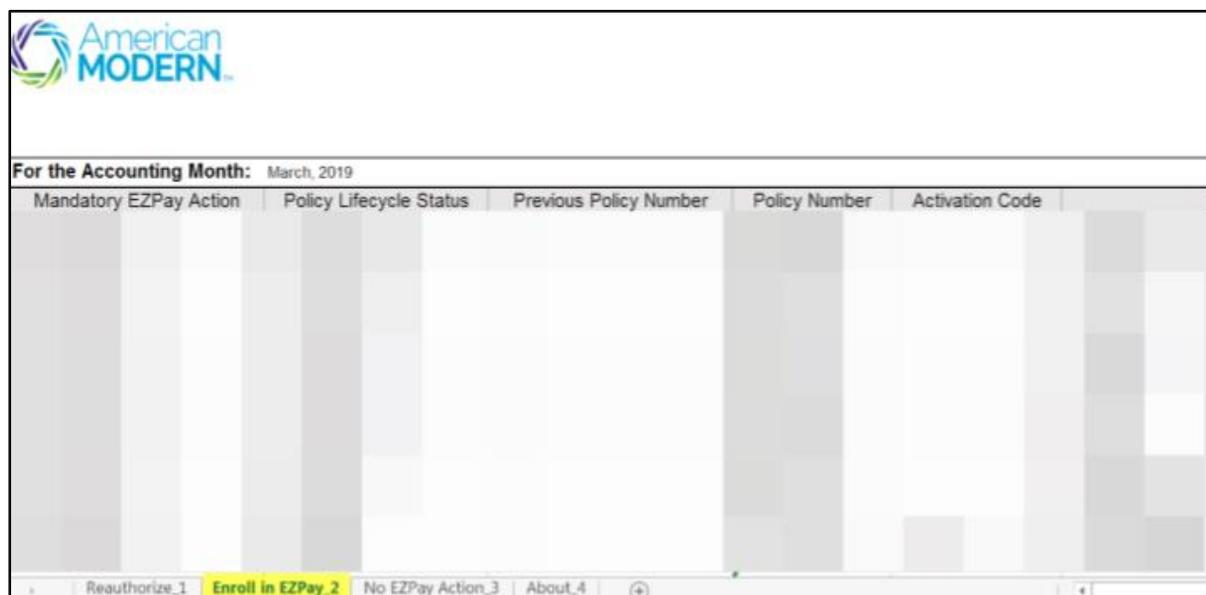
For the Accounting Month: March, 2019				
Mandatory EZPay Action	Policy Lifecycle Status	Previous Policy Number	Policy Number	Activation Code
Reauthorize_1	Enroll in EZPay_2	No EZPay Action_3	About_4	

**Re-Authorize Tab** Prioritize efforts in this tab. The policies in this section are on EZPay. However, either the EZPay authorization form is outdated, or American Modern does not have the correct form on-file. Reauthorization is required for policyholders to remain on EZPay.

**What ACTION Do I Need to Take?** Ensure the policyholder signs the latest EZPay authorization form, and that the form is provided to American Modern. Refer the policyholder to [www.amig.com/mypolicy](http://www.amig.com/mypolicy), and provide the policy number and activation code, which are needed for policyholder enrollment. If the policyholder electronically signs the form, the form will automatically be saved with American Modern. Otherwise, the policyholder can send the signed form to American Modern by email, fax, or standard mail. Alternatively, you may re-authorize the policyholder through the modernLINK or AMSuite applications – just ensure the form is attached to the policy in the system (preferred) or is sent to American Modern via email, fax, or standard mail.

# Reports Portal

# How to access Reports Portal



For the Accounting Month: March, 2019

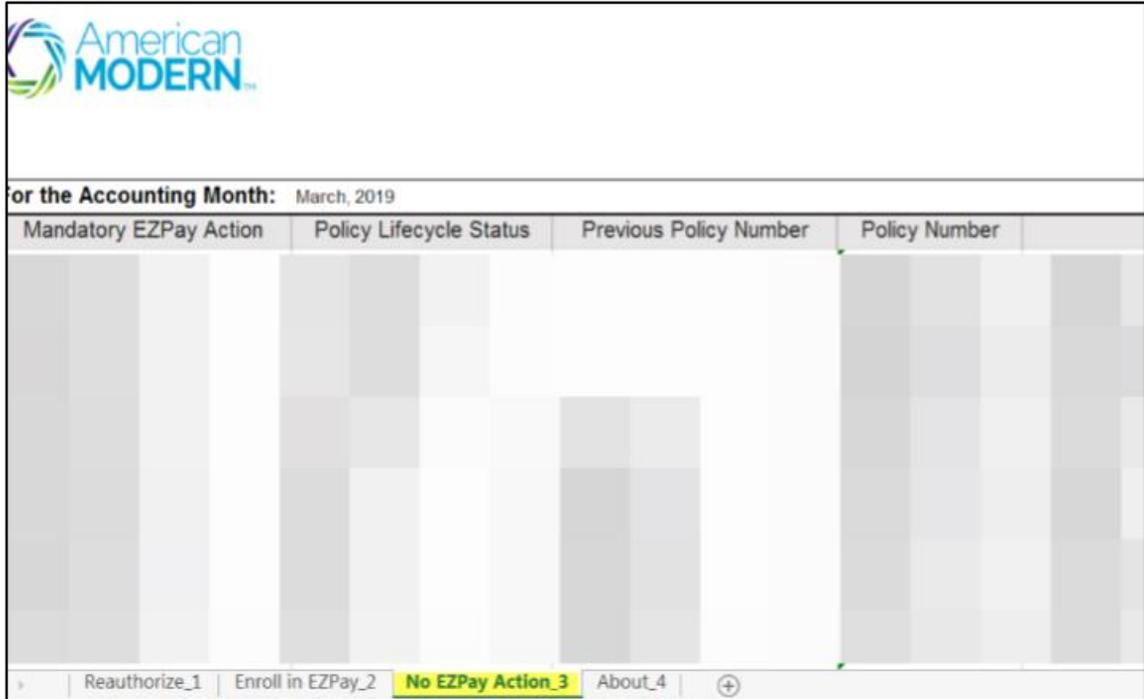
Mandatory EZPay Action	Policy Lifecycle Status	Previous Policy Number	Policy Number	Activation Code
Reauthorize_1	Enroll in EZPay_2	No EZPay Action_3	About_4	

**Enroll in EZPay Tab** The policies in this section are not currently enrolled in EZPay.

**What ACTION Do I Need to Take?** Encourage the policyholder to sign-up for EZPay, American Modern’s automatic payment program, and ensure that the authorization form is submitted to American Modern. Benefits include never worrying about missing a payment, the ability to select the day of the month the payment will be drawn, and the ability to spread payments over the year with a lower per-transaction fee. Refer the policyholder to [www.amig.com/mypolicy](http://www.amig.com/mypolicy), and provide the policy number and authorization code, which are needed for policyholder enrollment. If the policyholder electronically signs the form, the form will automatically be saved with American Modern. Otherwise, the policyholder can send the signed form to American Modern by email, fax, or standard mail. Alternatively, you may enroll the policyholder through the modernLINK or AMsuite applications – just ensure the form is attached to the policy in the system (preferred) or is sent to American Modern via email, fax, or standard mail.

# Reports Portal

# How to access Reports Portal



for the Accounting Month: March, 2019

Mandatory EZPay Action	Policy Lifecycle Status	Previous Policy Number	Policy Number

Reauthorize\_1 | Enroll in EZPay\_2 | **No EZPay Action\_3** | About\_4

**No EZPay Action Tab** The policies in this tab are either on EZPay with the proper authorization form on file, agency bill, or bill to the lienholder. There is no further EZPay action required at this time.

## Explaining the Policy Lifecycle Status Column in Each Tab

**Pre-Conversion** The policies in this category are within approximately 90 days of converting from modernLINK to AMsuite. This is the best opportunity to ensure existing EZPay policyholders have signed the latest EZPay authorization form (and that American Modern has that form on-file) in the Reauthorization Tab. It's also a great time to enroll invoice customers under the Enroll in EZPay Tab. Focusing on this Pre-Conversion Reauthorizations first and then Pre-Conversion enrollments will help maximize renewal rates during the conversion process.

**What ACTION Do I Need to Take?** For existing EZPay policyholders in the "Re-Authorize" tab, follow instructions to "Re-Authorize" in this help tab. For existing invoice policyholders in the "Enroll in EZPay" tab, follow instructions "Enroll in EZPay" per this help tab.

# Reports Portal

# How to access Reports Portal

**In Conversion** The policies in this category are actively converting from modernLINK to AMSuite and have less than approximately 60 days (although it could be more in some states) to accept their new policy offer in order to maintain coverage.

**IMPORTANT:** For policies that were on EZPay in modernLINK but have not re-authorized EZPay on the latest form (or for whom American Modern does not have the form on-file), the replacement policy in AMSuite will be defaulted to invoice. These policyholders must take action to accept their replacement policy as well as to remain on automatic payments without the latest EZPay authorization form on file with American Modern..

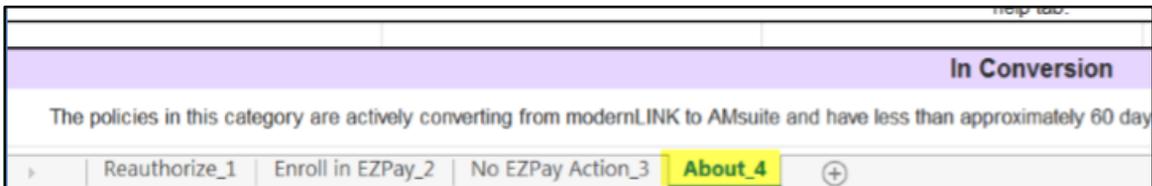
**What ACTION Do I Need to Take?** For policyholders previously on EZPay, ensure that the policyholder reenrolls in EZPay. This can be done through [www.amig.com/mypolicy](http://www.amig.com/mypolicy) by providing the policyholder their policy number and authorization code. Alternatively, you may enroll the policyholder through the AMSuite application – just ensure the form is attached to the policy in the system (preferred) or is sent to American Modern via email, fax, or standard mail. For invoice policyholders, acceptance of the replacement policy can be completed by making a payment on that policy. Note that if the policyholder would like to sign-up for EZPay using the [www.amig.com/mypolicy](http://www.amig.com/mypolicy) site, no down payment is required at the time of replacement policy acceptance.

**In Renewal** The policies in this category are actively renewing in modernLINK or moving to AMSuite.

**What ACTION Do I Need to Take?** For EZPay policyholders, pro-actively ensure they have signed the latest EZPay authorization form and that the form has been provided to American Modern. Refer to "Re-Authorize" (above). For invoice policyholders, pro-actively encourage them to enroll in EZPay. Refer to "Enroll in EZPay" (above).

**Mid-Term** The policies in this tab are currently neither actively converting nor renewing.

**What ACTION Do I Need to Take?** For EZPay policyholders, pro-actively ensure they have signed the latest EZPay authorization form and that the form has been provided to American Modern. Refer to "Re-Authorize" (above). For invoice policyholders, pro-actively encourage them to enroll in EZPay. Refer to "Enroll in EZPay" (above).



The About tab is a built-in job aid that contains all of the information that is in this document.

**For Agent Use Only - Not for Distribution**

February 2021  
Version: 1

Coverage is subject to policy terms, conditions, limitations, exclusions, underwriting review and approval, and may not be available for all risks or in all states. Rates and discounts vary, are determined by many factors and are subject to change. Policies are written by one of the licensed insurers of American Modern Insurance Group, Inc., including but not limited to American Modern Property and Casualty Insurance Company (CA Lic. No. 6129-1).

American Modern Insurance Group, American Modern, AMSuite, modernLINK, and Homeowners FLEX are trademarks or registered trademarks of American Modern Insurance Group, Inc.