

Trident - Agent Renewal Job Aid



Log in to Trident

From your "My Work" page, click on the "Renewals" tab

The screenshot shows the Trident Policy Management interface. At the top, there is a search bar and buttons for '+ Create Quote' and 'Rollover Policy'. Below the search bar, there are navigation tabs: 'Action Required (0)', 'Recent Work', 'Renewals', and 'Dashboard'. The 'Renewals' tab is highlighted with a red arrow. Below the navigation tabs, there are sub-tabs: 'My Work' and 'All Work'. Below the sub-tabs, there is a table header with columns: 'Action Required / Short Description', 'Insured Name', 'Elapsed', 'Time Left', 'Premium', and 'Agent Name'.

You will land on "My Renewals", click on "All Renewals" to ensure you are viewing all policies available under your login

The screenshot shows the Trident Policy Management interface for 'My Renewals'. At the top, there is a search bar and buttons for '+ Create Quote' and 'Rollover Policy'. Below the search bar, there is a notification box titled 'Risk Rating 2.0 Phase II Renewal is in effect' with a dropdown arrow. Below the notification box, there are sub-tabs: 'My Renewals' and 'All Renewals'. The 'All Renewals' tab is highlighted with a red arrow. Below the sub-tabs, there is a table titled 'POLICIES' with the following columns: 'Policy Number', 'Expiration Date', 'Insured Name', 'Property Address', 'Building Coverage', 'Contents Coverage', 'Last Year's Premium', 'Premium', 'Initial Bill Date', and 'Actio...'. The table contains three rows of data:

Policy Number	Expiration Date	Insured Name	Property Address	Building Coverage	Contents Coverage	Last Year's Premium	Premium	Initial Bill Date	Actio...
87075279582023	2023-10-13	Lancaster Lily	555 CORPORATE DR KALISPELL MT 59901	N/A	N/A	\$1,277	N/A	2023-08-29	⋮
87075279592023	2023-10-13	Williams Jilian	555 CORPORATE DR KALISPELL MT 59901	N/A	N/A	\$1,143	N/A	2023-08-29	⋮
87075278262023	2023-10-14	Mike Mikey	555 CORPORATE DR KALISPELL MT 59901	N/A	N/A	\$1,277	N/A	2023-08-30	⋮

Once you locate a policy that needs attention, click on the ellipsis (3 vertical dots below "Actions") for available options

Policy Management Search for quotes, policies, names & addresses + Create Quote Rollover Policy ?

Risk Rating 2.0 Phase II Renewal is in effect

- Policies will renew using a new pricing methodology under Risk Rating 2.0. In order to obtain a rate, new property information combined with existing policy data is required. To accommodate, information from public records and field defaults were used to obtain a rate.
- Action Needed: Carefully review the property information to ensure accuracy and make any needed adjustments for each renewal policy.
- Key fields to pay attention to: Insured Structure | Construction Type | Total Square Footage of Building | Estimated Building Replacement Cost | Foundation Type | Number of Floors | Floor Unit is located on | Number of Elevators | Machinery & Equipment location | Washer / Dryer / Food Freezer location | Number of Detached Structures

My Renewals All Renewals

POLICIES

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87075279592023	2023-10-13	Williams Jillian	555 CORPORATE DR KALISPELL MT 59901	N/A	N/A	\$1,143	N/A	2023-08-29	⋮
87075278262023	2023-10-14	Mike Mikey	555 CORPORATE DR KALISPELL MT 59901	N/A	N/A	\$1,277	N/A	2023-08-30	⋮

Select the applicable action

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My Renewals All Renewals

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View Policy Information
Edit Renewal Builder
View Renewal Bill

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