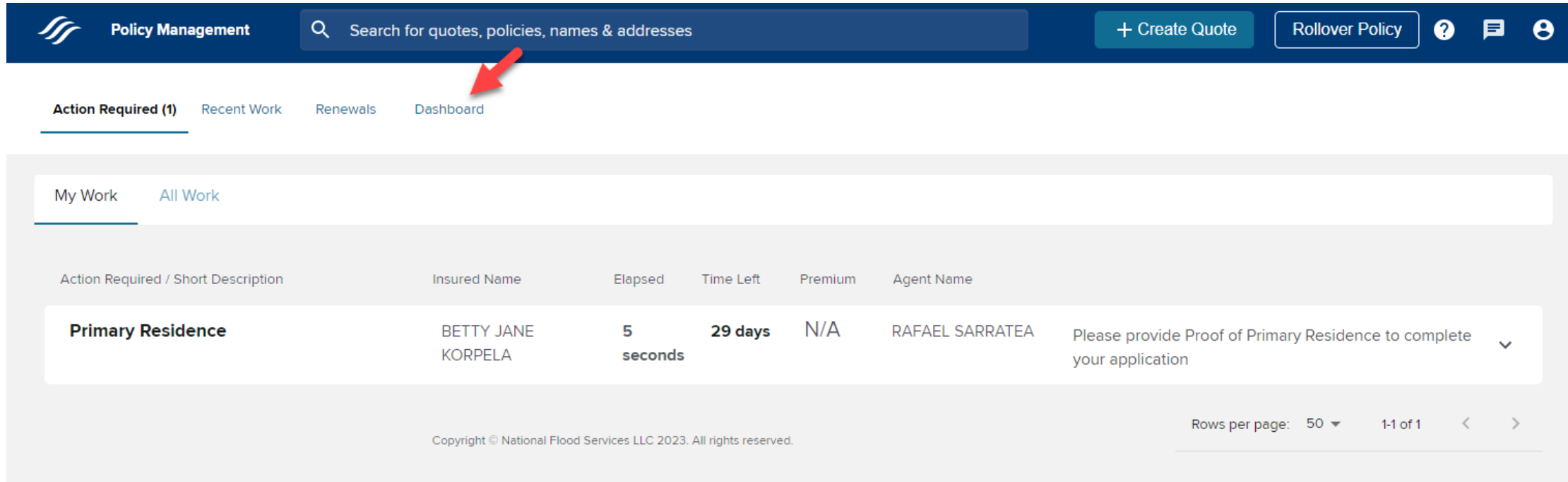






**AGENT DASHBOARD – MY DATA**  
**PAID APPLICATIONS & OPEN CLAIMS**


# NEW TAB CALLED “DASHBOARD”






**Policy Management** Search for quotes, policies, names & addresses [+ Create Quote](#) [Rollover Policy](#) ?  

[Action Required \(1\)](#) [Recent Work](#) [Renewals](#) [Dashboard](#)

[My Work](#) [All Work](#)

Action Required / Short Description	Insured Name	Elapsed	Time Left	Premium	Agent Name	
<b>Primary Residence</b>	BETTY JANE KORPELA	5 seconds	29 days	N/A	RAFAEL SARRATEA	Please provide Proof of Primary Residence to complete your application 

Rows per page: 50  1-1 of 1  

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## 2 DASHBOARD WIDGETS AVAILABLE – PAID APPLICATIONS & OPEN CLAIMS

The screenshot shows a web interface for 'Policy Management'. At the top, there is a dark blue header with a logo on the left and a search bar on the right containing the text 'Search for quotes, policies, names & addresses'. Below the header is a navigation menu with four items: 'Action Required', 'Recent Work', 'Renewals', and 'Dashboard', which is currently selected and underlined. The main content area is titled 'My Data' and contains two white widgets with blue borders. The first widget, 'Paid Applications', displays a total value of '\$12,780.00' and a 'Policy Count: 4'. Below this, it says 'See policies that have been paid in last 30 days'. The second widget, 'Open Claims', displays 'Open Claims: 2' and says 'See claims from the last 12 months'.

Paid Applications:  
Any application (regardless of status) that has been paid within the last 30 days. Click “[See policies](#)” to view more detail.

Open Claims:  
Any open claim for the last 12 months. Click “[See Claims](#)” for more detail.

# PAID APPLICATIONS – “SEE POLICIES”

Policy Management  [+ Create Quote](#) [Rollover Policy](#) [?](#) [🗨](#) [👤](#)

[Action Required](#) [Recent Work](#) [Renewals](#) **[Dashboard](#)**

My Data

← Paid Applications

Policy Number	Effective Date	State	Insured Name	Property Address	Premium Amount	Agent code
8707539835	12/22/2022	Issued	bethany cinderella kang...	21085 GERTRUDE AVE PORT CHARLOTTE, FL 33952-52...	\$2,721.00	08711-05
8707539838	05/01/2023	Issued	Bethany Christine Ruoh...	8208 TAMPA POINT BLVD TAMPA, FL 33621	\$5,541.00	08711-05
8707539839	06/16/2023	Pending	Bethany Betty Lehtola	11503 SW 148TH LN MIAMI, FL 33176-7473	\$2,846.00	08711-05
8707539840	06/16/2023	Pending	Betty Jane Korpela	12458 SW 220TH ST MIAMI, FL 33170-2872	\$1,672.00	08711-05

Rows per page: 100 ▾ 1-4 of 4 < >

- Click on any policy number to be taken to the policy or application page.
- Note the “state” column will tell you if the paid application is issued or pending.

# OPEN CLAIMS – “VIEW CLAIMS”

Policy Management  [+ Create Quote](#) [Rollover Policy](#) [?](#) [🗨](#) [👤](#)

Action Required Recent Work Renewals **Dashboard**

My Data

← Open Claims

Policy Number	Insured Name	Property Address	Loss Date	Building Payment	Content Payment	ICC Claim P
87075398382023	Bethany Christine Ruoh...	8208 TAMPA POINT BLVD TAMPA, FL 33621	05/12/2023	\$0.00	\$0.00	\$0.00
87075398352022	bethany cinderella kang...	21085 GERTRUDE AVE PORT CHARLOTTE, FL 33952-52...	05/14/2023	\$0.00	\$0.00	\$0.00

Rows per page: 100 ▾ 1-2 of 2 < >

- Click on any policy number to be taken to the claims summary for the policy.
- Note the data columns show you the date of loss and payment amounts made.