TRIDENT RELEASE - VIEW & ADD NOTES

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VIEW & ADD NOTES - SUMMARY

- A Notes tab is added to the Policy Details page and the Policy Builder (application) page.
  - Users can add notes directly to a policy from the policy details page.
  - Notes can be added to an application from the policy builder page.
  - Notes added to the policy builder page are carried forward to the policy details page when the policy was issued.
- Users will be able add notes or see notes on an application or a policy. This allows our clients, their agents, and our in house users to better help our customers.
- Notes added to the policy builder (application) carry forward to the policy details page when the policy is issued.
- Internal NFS users are able to add notes that are visible to only internal users.
- The newest note always appear on top, ordered from newest to oldest.

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WHAT'S IN & WHAT'S OUT

What is included in Day 1 functionality	What's not included in Day 1
All users can see a list of notes on a policy or application (policy builder)	Claims Notes are not visible in the policy notes
User can add a new note	Legacy Notes previously entered in WAVE or FloodPro will not be displayed in Trident
CSR's/UW can mark note for internal use only	System notes (i.e. when documents are printed)
CSR's/UW can see if a note is viewable to all users or is a note for internal use only	Notes cannot be edited after they are saved
The date (mm/dd/yyyy) the note was entered is visible.	The time stamp of the entered note is not visible.
The username of the person who added the note is visible	

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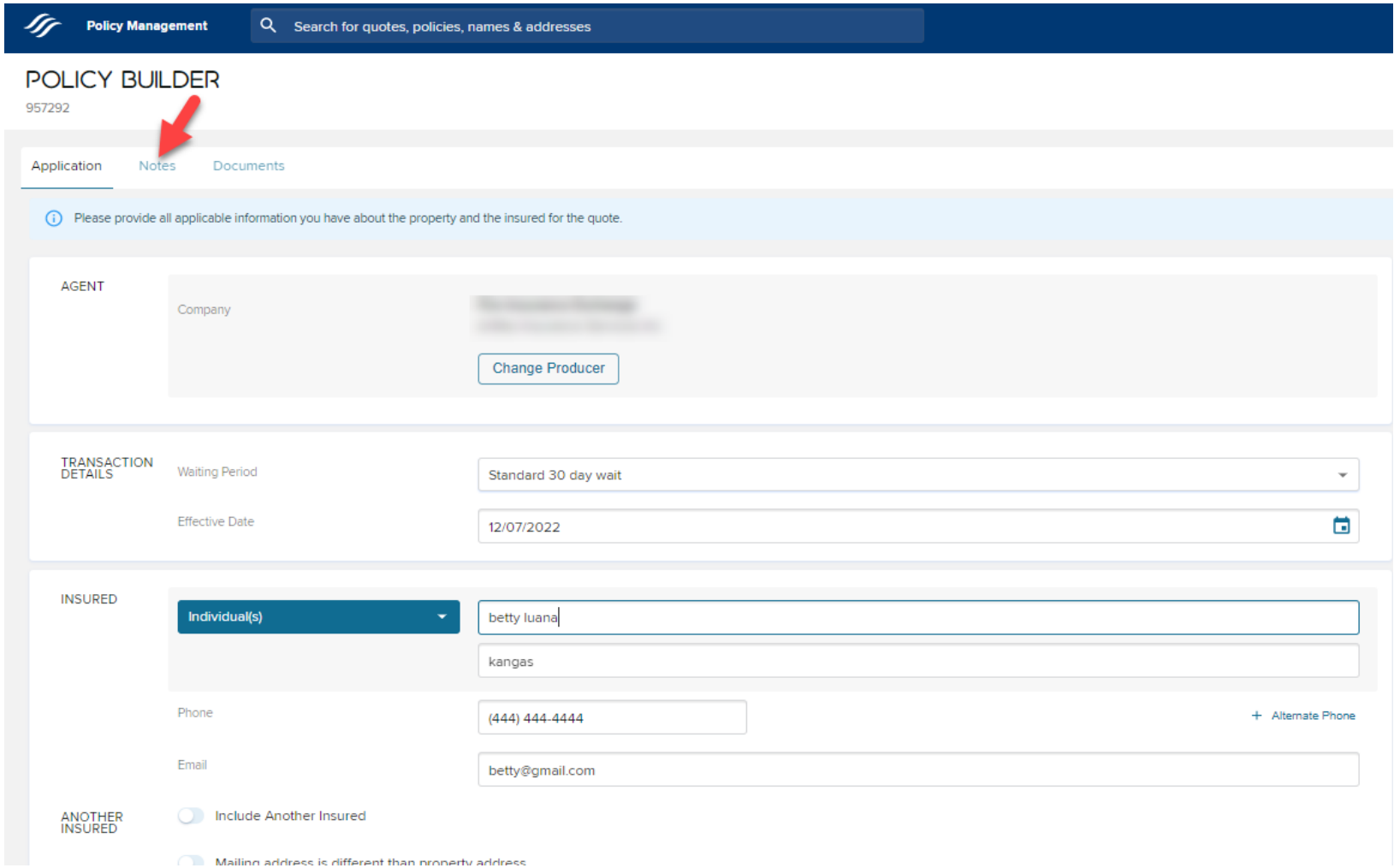
NOTES - POLICY BUILDER (APPLICATION)

- A new tab is available on the policy builder (application) page called Notes
- The Notes tab is available as soon as a quote number is assigned (after the property address is verified).
- Click the Notes tab to view and add notes



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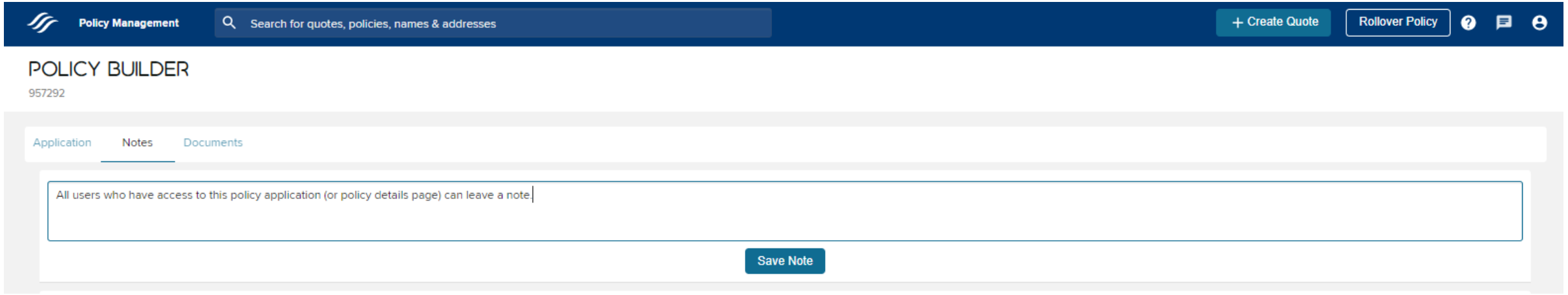
POLICY BUILDER NOTES (APPLICATION)

- A notes entry box is always available at the top. To add a note, type in the notes entry box and click “save note”.
- All users who have access to the quote or policy can view and add notes.



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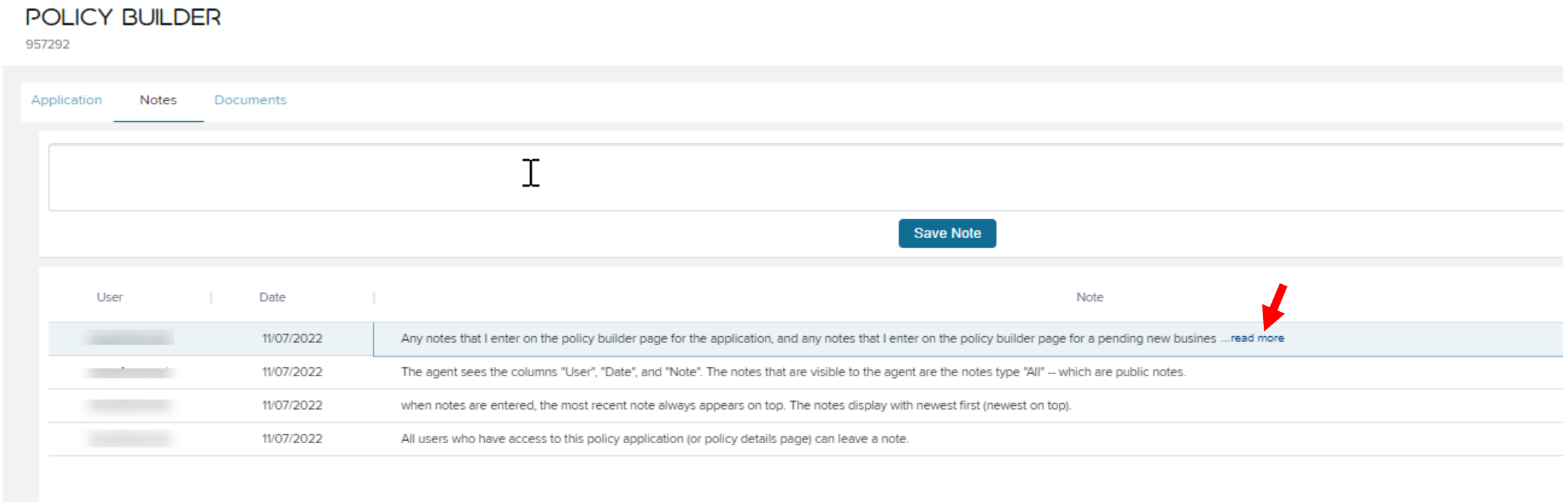
POLICY BUILDER NOTES (APPLICATION)

- The newest note is always displayed on top, ordered from newest note to oldest note.
- The agent user sees the columns “User”, “Date”, and “Note”
- If the note is a long note; the first 150 characters of the note is displayed; and the user can click “read more” to display the full note.
- Notes entered on the policy builder (application) page will carry forward to the policy details page.



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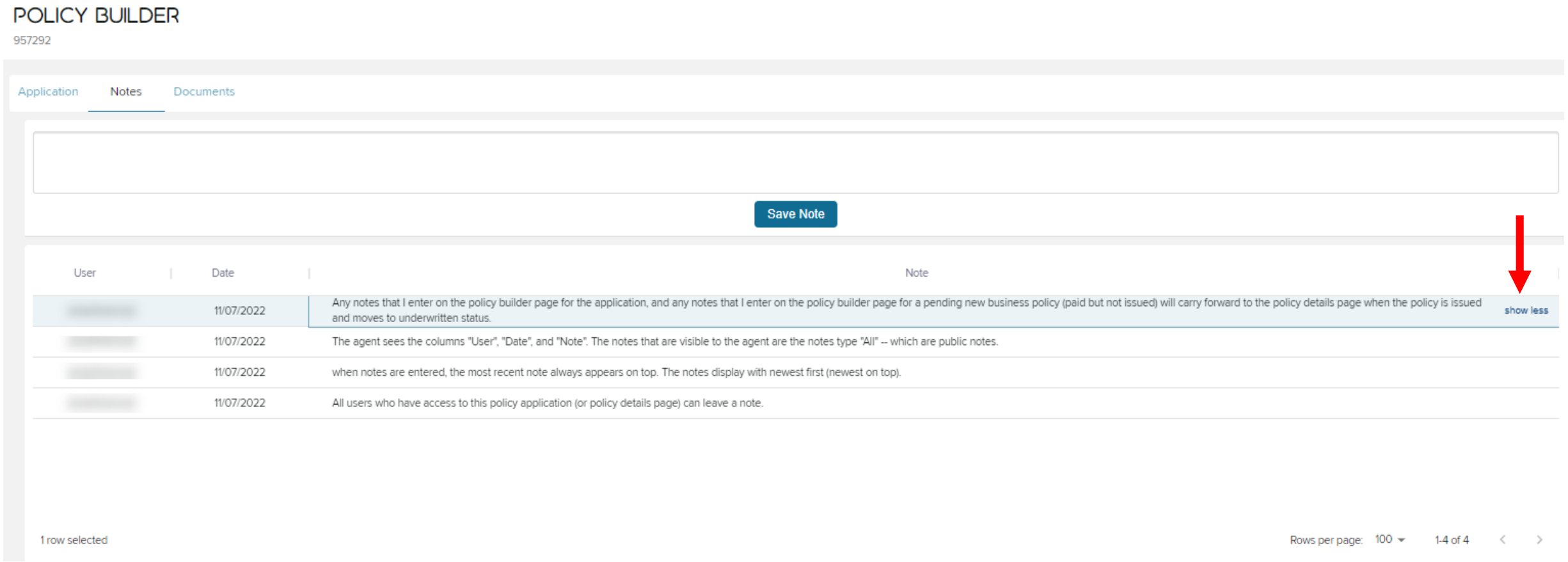
POLICY BUILDER NOTES (APPLICATION)

- To collapse an expanded note, just click “show less”



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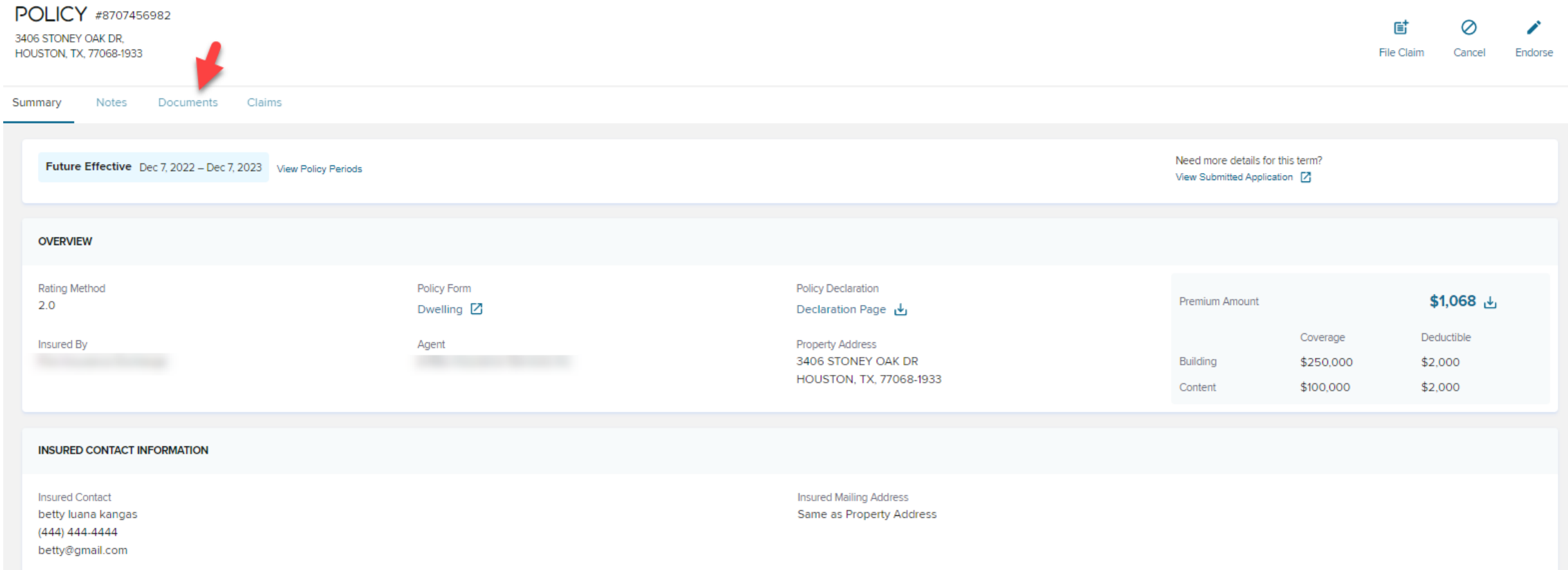
POLICY DETAILS NOTES

- A Notes tab is added to the policy details page.



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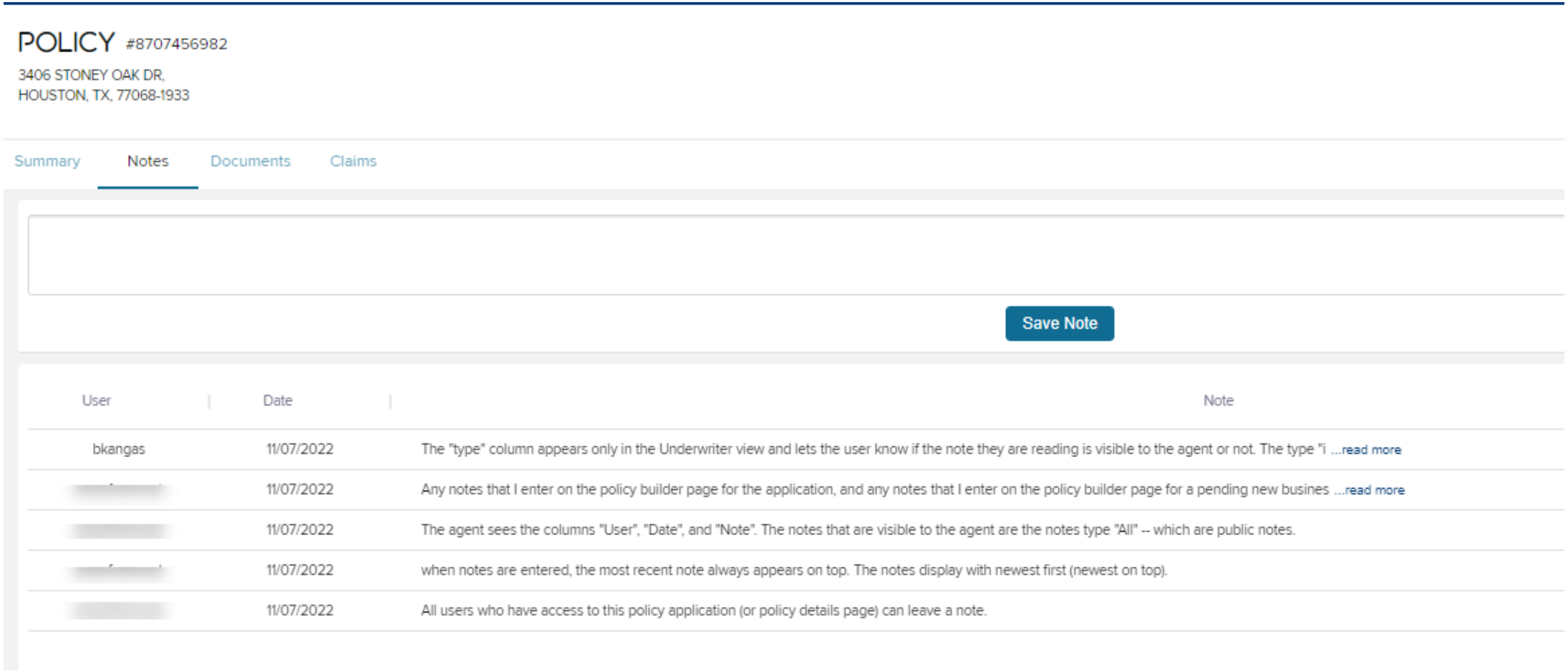
POLICY DETAILS NOTES

- The notes saved on the policy builder (application) page are carried forward to the policy details page.



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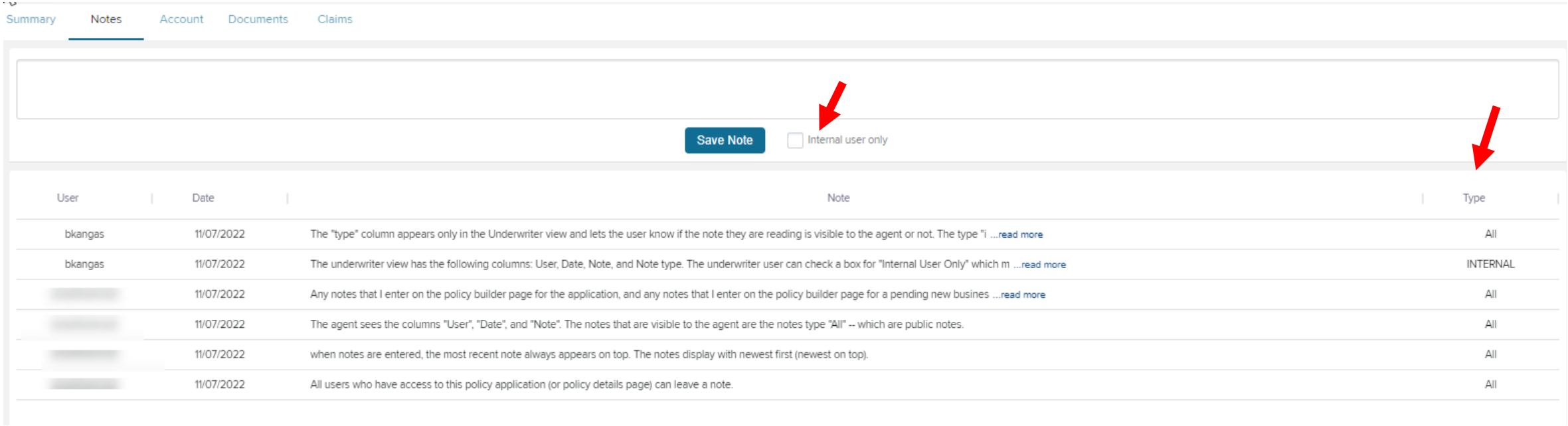
POLICY & APPLICATION NOTES – UNDERWRITER VIEW

- Underwriter sees an option to check “Internal User Only” which makes a note hidden from the agent.
- The Underwriter sees a “Type” column that helps the UW see if the note is visible to the agent.
- Agent users do NOT see the “internal user only” check box and does not see the note “type” column.



Important Message: **<u>Most notes should be public notes.</u>** In general "internal only" notes should be mentions related to a FEMA inquiry, Department of Insurance complaint or NFIP / FEMA correspondence regarding a policy. Ask your supervisor for help if you have questions.

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