



## TRIDENT RELEASE - VIEW & ADD NOTES

## VIEW & ADD NOTES - SUMMARY

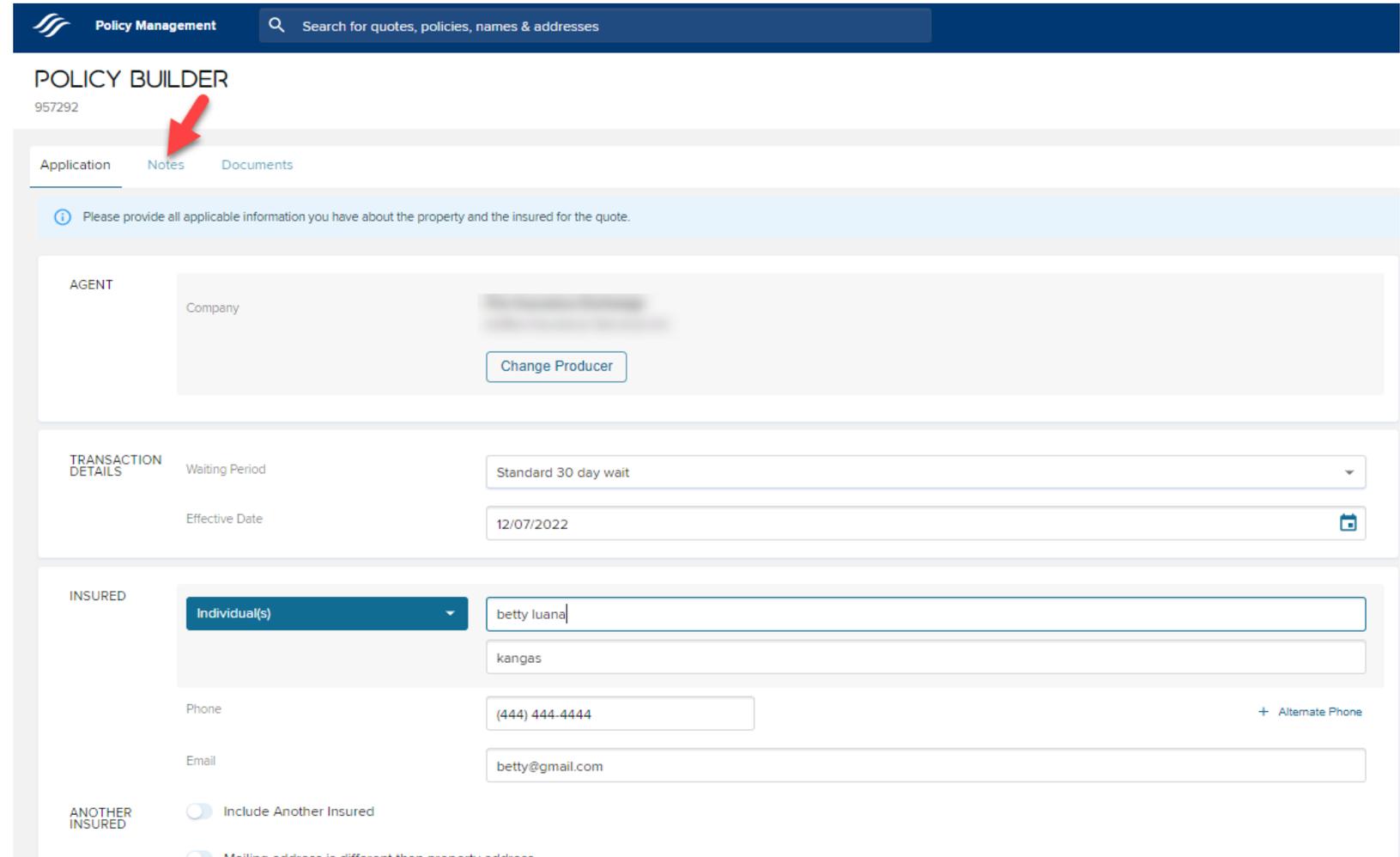
- A Notes tab is added to the Policy Details page and the Policy Builder (application) page.
  - Users can add notes directly to a policy from the policy details page.
  - Notes can be added to an application from the policy builder page.
  - Notes added to the policy builder page are carried forward 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.

# 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	

## NOTES - POLICY BUILDER (APPLICATION)

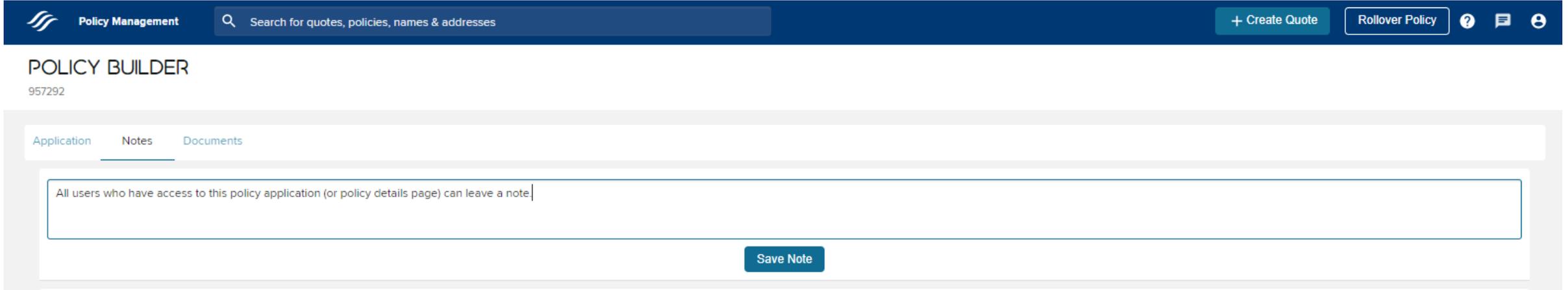
- A new tab is available on the policy builder (application) page called Notes
- The Notes tab is available as soon as a quote number is assigned (after the property address is verified).
- Click the Notes tab to view and add notes



The screenshot displays the 'Policy Management' interface for the 'POLICY BUILDER' application. The header includes a search bar and the application title. Below the header, there are three tabs: 'Application', 'Notes', and 'Documents'. A red arrow points to the 'Notes' tab, which is currently selected. The main content area contains a light blue banner with the instruction: 'Please provide all applicable information you have about the property and the insured for the quote.' Below this, the form is organized into sections: 'AGENT' with a 'Company' field and a 'Change Producer' button; 'TRANSACTION DETAILS' with 'Waiting Period' (Standard 30 day wait) and 'Effective Date' (12/07/2022); 'INSURED' with a dropdown menu set to 'Individual(s)', a text input field containing 'betty luana', another field containing 'kangas', a 'Phone' field with '(444) 444-4444', and an 'Email' field with 'betty@gmail.com'. At the bottom, there are two toggle options: 'Include Another Insured' and 'Mailing address is different than property address'.

## 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.



The screenshot displays the 'Policy Builder' interface. At the top, there is a dark blue navigation bar with the 'Policy Management' logo on the left, a search bar containing the text 'Search for quotes, policies, names & addresses', and several action buttons on the right: '+ Create Quote', 'Rollover Policy', a help icon (?), a chat icon, and a user profile icon. Below the navigation bar, the page title 'POLICY BUILDER' is shown, followed by the policy ID '957292'. The main content area features three tabs: 'Application', 'Notes', and 'Documents'. The 'Notes' tab is currently selected. A large text input field is present, containing the text 'All users who have access to this policy application (or policy details page) can leave a note'. A 'Save Note' button is positioned at the bottom right of this input field.

# 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.

## POLICY BUILDER

957292

The screenshot shows the 'POLICY BUILDER' interface with the 'Notes' tab selected. At the top, there are three tabs: 'Application', 'Notes', and 'Documents'. Below the tabs is a large text input field containing a cursor (I). To the right of the input field is a blue 'Save Note' button. Below the input field is a table with the following columns: 'User', 'Date', and 'Note'. The table contains four rows of notes. The first row's note is truncated and ends with a '...read more' link, which is highlighted by a red arrow. The other rows show full notes.

User	Date	Note
[Redacted]	11/07/2022	Any notes that I enter on the policy builder page for the application, and any notes that I enter on the policy builder page for a pending new busines ... <a href="#">read more</a>
[Redacted]	11/07/2022	The agent sees the columns "User", "Date", and "Note". The notes that are visible to the agent are the notes type "All" -- which are public notes.
[Redacted]	11/07/2022	when notes are entered, the most recent note always appears on top. The notes display with newest first (newest on top).
[Redacted]	11/07/2022	All users who have access to this policy application (or policy details page) can leave a note.

# POLICY BUILDER NOTES (APPLICATION)

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

## POLICY BUILDER

957292

Application **Notes** Documents

[Save Note](#)

User	Date	Note	
[REDACTED]	11/07/2022	Any notes that I enter on the policy builder page for the application, and any notes that I enter on the policy builder page for a pending new business policy (paid but not issued) will carry forward to the policy details page when the policy is issued and moves to underwritten status.	<a href="#">show less</a>
[REDACTED]	11/07/2022	The agent sees the columns "User", "Date", and "Note". The notes that are visible to the agent are the notes type "All" -- which are public notes.	
[REDACTED]	11/07/2022	when notes are entered, the most recent note always appears on top. The notes display with newest first (newest on top).	
[REDACTED]	11/07/2022	All users who have access to this policy application (or policy details page) can leave a note.	

1 row selected

Rows per page: 100 ▾ 1-4 of 4 < >



# POLICY DETAILS NOTES

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

POLICY #8707456982

3406 STONEY OAK DR,  
HOUSTON, TX, 77068-1933

 File Claim  Cancel  Endorse



Summary **Notes** Documents Claims

**Future Effective** Dec 7, 2022 – Dec 7, 2023 [View Policy Periods](#)

Need more details for this term?  
[View Submitted Application](#)

## OVERVIEW

Rating Method  
2.0

Policy Form  
Dwelling 

Policy Declaration  
Declaration Page 

Premium Amount **\$1,068** 

Insured By

Agent

Property Address  
3406 STONEY OAK DR  
HOUSTON, TX, 77068-1933

	Coverage	Deductible
Building	\$250,000	\$2,000
Content	\$100,000	\$2,000

## INSURED CONTACT INFORMATION

Insured Contact  
betty luana kangas  
(444) 444-4444  
betty@gmail.com

Insured Mailing Address  
Same as Property Address

# POLICY DETAILS NOTES

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

POLICY #8707456982

3406 STONEY OAK DR,  
HOUSTON, TX, 77068-1933

Summary **Notes** Documents Claims

Save Note

User	Date	Note
bkangas	11/07/2022	The "type" column appears only in the Underwriter view and lets the user know if the note they are reading is visible to the agent or not. The type "i ...read more
[REDACTED]	11/07/2022	Any notes that I enter on the policy builder page for the application, and any notes that I enter on the policy builder page for a pending new busines ...read more
[REDACTED]	11/07/2022	The agent sees the columns "User", "Date", and "Note". The notes that are visible to the agent are the notes type "All" -- which are public notes.
[REDACTED]	11/07/2022	when notes are entered, the most recent note always appears on top. The notes display with newest first (newest on top).
[REDACTED]	11/07/2022	All users who have access to this policy application (or policy details page) can leave a note.

## 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.

The screenshot displays the 'Notes' section of the Underwriter View. At the top, there are navigation tabs: Summary, Notes, Account, Documents, and Claims. Below the tabs is a large text input area. To the right of the input area is a 'Save Note' button and an 'Internal user only' checkbox. A red arrow points to the checkbox. Below this is a table of notes with the following columns: User, Date, Note, and Type. A red arrow points to the 'Type' column header. The table contains six rows of notes, each with a user name, a date of 11/07/2022, a note body, and a type (All or INTERNAL).

User	Date	Note	Type
bkangas	11/07/2022	The "type" column appears only in the Underwriter view and lets the user know if the note they are reading is visible to the agent or not. The type "i ...read more	All
bkangas	11/07/2022	The underwriter view has the following columns: User, Date, Note, and Note type. The underwriter user can check a box for "Internal User Only" which m ...read more	INTERNAL
[blurred]	11/07/2022	Any notes that I enter on the policy builder page for the application, and any notes that I enter on the policy builder page for a pending new busines ...read more	All
[blurred]	11/07/2022	The agent sees the columns "User", "Date", and "Note". The notes that are visible to the agent are the notes type "All" -- which are public notes.	All
[blurred]	11/07/2022	when notes are entered, the most recent note always appears on top. The notes display with newest first (newest on top).	All
[blurred]	11/07/2022	All users who have access to this policy application (or policy details page) can leave a note.	All

**Important Message: Most notes should be public notes.** 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.