



Producer Reports Available on Izzy

Pending Renewals

This report should be used by the agency staff for accessing upcoming renewals. The following steps are needed to generate a report:

1. From the toolbar on the right hand side, select **Report Menu** and then **Underwriting**. A list of reports will be given in alphabetical order.
Click on **Pending Renewals**.
2. Select a date range at the top. Notice that the dates can be customized to verify specific reports. For this particular report notice the date range is when the renewal was created, not the actual effective date.
3. Choose the preview type. This report can be viewed in Word, Excel, or online. The results will then be displayed.
4. A listing of policies with renewal dec pages created between the dates selected will be shown. When choosing the online view click the policy number to view the actual policy. Or, at the very bottom click on detailed reports and a list of all declaration pages will be given. Feel free to print what is needed from this screen.

Pending Cancellation

This is a daily report agents can use to view policies that are pending cancellation. Report dates are not necessary because the information rolls over each day. For example, if the agent prints the report on Monday and Joe Smith is listed and then prints the report again on Wednesday and Joe Smith is still listed, it means the insured hasn't paid and is still pending cancel. If Joe Smith's name is not on the report then he has either paid his premium or cancelled. To access this report do the following:

1. From the toolbar on the right hand side, select **Report Menu** and then **Underwriting**. A list of reports will be given. Click on **Pending Cancellations**.
2. Choose the preview type. This can be viewed in Word, Excel, or online. Results will then be displayed. The current policies pending cancellation will be given. When choosing the online view click the policy number to view policy information.

Outstanding Renewal Invoices

This report can be used by the agent to look at Outstanding Renewal Invoices. There is no date range necessary to view this report. Simply follow the instructions below.

1. From the toolbar on the right hand side select **Report Menu** and then **Underwriting**. A list of reports will be given.
2. Look for **Outstanding Renewal Invoices**. This will list all policies pending a renewal payment. The report can be viewed in Word, Excel, or online. Click on the policy number to view specific policy information.

ACH Report

This is a real time report that allows Agency staff to view payment uploads, upload date, and bank sweep information.

1. From the toolbar on the right hand side select **Report Menu** and then **Payments**.
2. Choose **ACH Report**. The Invoice Payment screen will be shown.
3. Fill in necessary information and from the Select Report field choose the **Detail by EFT date** option within the drop down box.
4. Detail for specific dates will be given.

Transaction Report

The Transaction Report is used to see what has been processed by your agency and lists out all endorsements, adjustments, reinstatements, and cancellations. This report can also be used to look at new business, down payments, and normal monthly installments. **Please note that this report can be very large, so please limit your date range accordingly.** To access the report follow the steps below:

1. From the toolbar on the right hand side, select **Report Menu** and then **Underwriting**. A list of reports will be given in alphabetical order. Look for the **Transaction Report**.
2. Select a date range at the top. Notice that the dates can be customized to verify specific reports.
3. Click on show report.
4. Next, a drop down will be shown on this page. You can make a selection as to what types of transactions need to be viewed. Click on Run Reports and a list of policies and all processing information will be listed.