

EMAIL TRANSFERS GUIDELINES

You should not transfer anything that you are trained to work with:

If I am email skilled or have been trained on BWIC - what can I do?

Mortgage Change
Lender Verification if sent via email
Document requests
Confirmation that a payment has been received
Send invoice, dec, epi, checklist of coverage

Submit Signed Cancellation

Submit Signed Change Requests
Send receipt for payment confirmation for payment that was already submitted

Email Triage - EM Deleted Skill

Verification that email or document was received
Make a change in AMS

What should I not work no matter the skill?

Work an auto policy
Send anything to the AOR on the policy
Interpret or consult on coverages

If you are unsure if you should work something what do you do?

Reach out to T2 via chats for assistance.

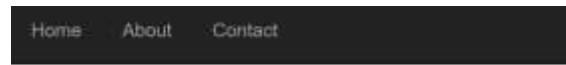
***Please note that transferring a request that you are trained/skilled to work with is considered **work avoidance** and it's subject to corrective actions. These instances are being tracked individually at the agent level.

These email or policy types should be transferred:

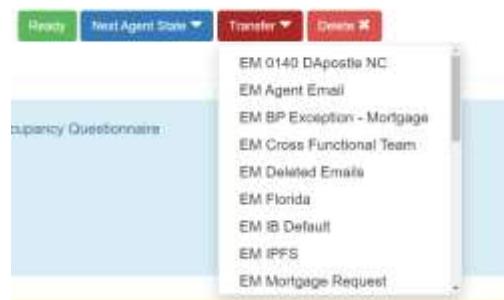
- New Business: adding an additional LOB, reshop, rewrite (EM FL / EM National ->AOR)
- In-depth Billing Questions/Requests (EM FL /EM National)
- In-depth Coverage Questions/Requests (EM FL / EM National)
- In-depth Auto Policies Questions/Requests (EM FL / EM National)
- Agency Billed (EM FL / EM National)
- Commercial (EM FL / EM National)
- VIP Accounts (EM FL / EM National)
- Spanish (EM-Spanish)

Transferring to another skill

To transfer an email to another skill, select the Transfer dropdown from BWIC:



Then select the skill to which you want to transfer the email you cannot work with:



TOOLS TO USE:

- **Wiki/Outplex Manual**
- **GUI:** it will give you useful pop-ups and guidance about what to transfer and where.
- Consult with your **TM** and local leadership before transferring.
- **T2 chat:** if instructed by your TM to obtain assistance.