

## **Retrieving Policy and Submission Documents**

Policy and submission documents, like claims reports, billing information, etc. can be found as attachments in Snap's Collaboration tool. You can also refer to Snap's online help for instructions by clicking the Help icon (2) at the top right of the Snap home page.

### **Retrieving Policy and Submission Documents**

 On the Snap home page, make sure the Submissions filter is set to My Agency-All and then click the Search icon.



2. Enter the insured name or submission number in the Insured field.

**Note:** The letter prefix and the two-digit suffix are not needed.



3. Single-click anywhere in the row containing the desired policy or submission.

| brand  | Salaminian         | Effective   | Section        | Preciam   | New Action | Assigned To         |   |
|--|--------------------|-------------|----------------|-----------|------------|---------------------|---|
| Westgala I Water of Services in Jun – Andrew | 10.85554           | 31031-2019  | Constants      | 2129.685  |            | Exclusion (         | > |
| tee ory Want Phila Tenetes Co. Inc.          | 1077101            | 04/01/2019  | Circi-Seady    | 90        |            | East UNITED         | , |
| to an avoid shift                            | 0072935            | 08/30/2019  | Char Raistr    | 80        |            | Jame Readoux        | > |
| loc organizate                               | 1026215            | 11/04/2019  | Channel        | \$3.835   |            | (ana Remark         | > |
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| to the Decision of 1021                      | W50 9037705.00     | 95/06/200 7 | Based          | \$21,665  |            | Charatane Looksy    | > |
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|  | 10.75 53 15 154 66 |             |                | 2012/2014 |            | 0                   |   |





## **Retrieving Policy and Submission Documents**

4. Click the **Collaboration** icon.



Use yellow highlight here:

#### Search field

Use the search field for a text-based search across all records. Snap will match full and partial terms, but is not case sensitive. Results display in the workspace chronologically.

# Collaboration Image: Collaboration Image: Chat Image: Chat All Chat Chat Emails Files Tasks Notes Image: Chat Files Image: Chat Files

5. Click on the **Files** type icon in the **Collaboration** header.

| Collaboration 🔒 🌣 |   |                              |                          |                 |                    |  |
|-------------------|---|------------------------------|--------------------------|-----------------|--------------------|--|
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## **Retrieving Policy and Submission Documents**

 You can use the search bar to enter a term, like loss run, or scroll through the cards to view the Collaborations. Keep in mind that the search term must contain the exact name, Loss Run is not the same search as Loss Runs.

**Note:** For Collaboration searching techniques, refer to the <u>Snap</u> <u>Producer Guide</u> available in <u>Agent Portal</u>.

If you are looking for ICW loss runs, click on Actions and then click on View Loss Run. You can also find loss runs in Agent Portral.





 When you find the Collaboration card you're looking for, click the **blue** hyperlink on the card to open the file. Once the file opens, you can save it to another location if you wish.







## **Loss Runs for Multiple Years**

 Detailed loss runs are specific to each year. For example, if you are looking for a detailed loss run for a policy effective 2021, you will need to select that year. If you also need to retrieve loss runs for a prior year for that same insured, click on Account History in the left navigation area.



2. Click on the row containing the desired policy you are looking for and repeat steps 4-7 above.

**Note:** As a convenience, you may also download Loss Run Reports in PDF format from Agent Portal. Up to five years can be downloaded in a single click!

| Submissions |                     |            |         |             |            |               |  |
|-------------|---------------------|------------|---------|-------------|------------|---------------|--|
|             | Insured             | Submission | Status  | Effective • | Expiration | Received Date |  |
|             | Complete Commercial | WSC 03     | Renewed | 05/24/2019  | 05/24/2020 | 01/19/2019    |  |
|             | Complete Commercial | WSC 04     | Renewed | 05/24/2020  | 05/24/2021 | 01/16/2020    |  |
|             | Complete Commercial | WSC 05     | Issued  | 05/24/2021  | 05/24/2022 | 01/15/2021    |  |



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