

Chubb Marketplace

Renewals Quick Reference Guide



- A. On July 23, 2018, a list of your upcoming renewals will become available in the Chubb Marketplace beginning with October 22, 2018 renewal effective dates.

To view a list of your upcoming renewals, select the **Current Customers** tab from the top navigation and then click **Renewals**.

The screenshot shows the Chubb Marketplace interface. At the top, there is a navigation bar with the Chubb logo, 'Small Commercial Marketplace', and user information 'Alerts(4)' and 'Hi, Alice'. Below this is a secondary navigation bar with tabs: 'Dashboard', 'New Business', 'Current Customers' (highlighted with a red circle), 'Knowledge & Support', and 'Chubb Rewards'. A 'Start New Quote' button is also present. Below the navigation is a search bar for 'Customer By Business Name' with the placeholder text 'Find your current customer by entering the name of their business'. The main content area is titled 'Current Customers' and has two sub-tabs: 'Customer List' and 'Renewals' (highlighted with a red circle). Below the sub-tabs is a search bar for 'Enter the business name to filter the renewal list'. There are filters for 'My Customers' (selected) and 'All Customers', 'RENEWAL EFFECTIVE DATE' (set to 'Within 31-60 Days'), and 'STATUS' (set to 'All'). A checkbox for 'Include Policies Serviced in the Chubb Customer Service Center' is also visible. The main content is a table with the following data:

BUSINESS NAME	PRODUCT	RENEWAL EFFECTIVE DATE	EXPIRING TERM PREMIUM	RENEWAL PREMIUM	STATUS
RIAL HEATING & AIR CONDITIONING >	WORK COMP	8/26/18	\$4,826.00	\$4,826.00	Issued >
JOE'S KANSAS CITY BAR-B-QUE >	BOP	8/19/18	\$1,526.00	\$1,526.00	Pending Issuance >

B. Within the Renewals tab, you will be able to view the following:

- Business Name
- Product
- Renewal Effective Date
- Expiring Term Premium
- Renewal Premium
- Status

The screenshot shows the 'Renewals' tab interface. At the top, there are two tabs: 'Customer List' and 'Renewals'. Below the tabs is a search bar with the placeholder text 'Enter the business name to filter the renewal list' and a search icon. Underneath the search bar are two tabs: 'My Customers' and 'All Customers'. To the right of these tabs are two filter dropdowns: 'RENEWAL EFFECTIVE DATE' set to 'Within 31-60 Days' and 'STATUS' set to 'All'. Below the filters is a checkbox labeled 'Include Policies Serviced in the Chubb Customer Service Center'. The main content is a table with the following columns: BUSINESS NAME, PRODUCT, RENEWAL EFFECTIVE DATE, EXPIRING TERM PREMIUM, RENEWAL PREMIUM, and STATUS. The table contains two rows of data.

BUSINESS NAME	PRODUCT	RENEWAL EFFECTIVE DATE	EXPIRING TERM PREMIUM	RENEWAL PREMIUM	STATUS
RIAL HEATING & AIR CONDITIONING >	WORK COMP	8/26/18	\$4,826.00	\$4,826.00	Issued >
JOE'S KANSAS CITY BAR-B-QUE >	BOP	8/19/18	\$1,526.00	\$1,526.00	Pending Issuance >

C. You will also have the ability to filter your list of upcoming renewals by Renewal Effective Date Range and Status.

This screenshot is identical to the one above, but with red circles highlighting the 'RENEWAL EFFECTIVE DATE' and 'STATUS' filter dropdowns to emphasize the filtering capabilities.

D. Status Descriptions:

Status	Description
Pending Issuance	The upcoming renewal has been approved and will issue 30-days ahead of the renewal effective date.
Referred	The upcoming renewal is currently being reviewed by underwriting.
Non-Renewal	An underwriting decision was made not to renew the policy.
Issued	The policy has been issued and will be inforce on the renewal effective date. Policy documents are now available under your client's Customer Profile.

E. By selecting your client's status under the Renewals tab, you will be brought to the Renewal Summary page where additional information such as policy number, expiration date, and your Chubb Team can be found.

BUSINESS NAME	PRODUCT	RENEWAL EFFECTIVE DATE	EXPIRING TERM PREMIUM	RENEWAL PREMIUM	STATUS
RIAL HEATING & AIR CONDITIONING >	WORK COMP	8/26/18	\$4,826.00	\$4,826.00	Issued >
JOE'S KANSAS CITY BAR-B-QUE >	BOP	8/19/18	\$1,526.00	\$1,526.00	Pending Issuance >

CHUBB Small Commercial Marketplace

Renewal Summary

Joe's Kansas City Bar-b-que

[Return to Customer Profile](#)

CUSTOMER NAME Joe's Kansas City Bar-b-que	POLICY NUMBER BOP - # 000072000693	PRIMARY INSURED ADDRESS 3002 W 47TH AVE KANSAS CITY, KS 66103
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POLICY EFFECTIVE DATE 8/19/18	POLICY EXPIRATION DATE 1/1/01
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STATUS

- Pending Issuance

EXPIRING TERM PREMIUM \$1,526.00	RENEWAL PREMIUM \$1,526.00
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Need Help?

REQUEST A CALL FROM YOUR CHUBB TEAM

The following members of your chubb team are currently available.

F. Your upcoming renewals will be added to the Renewals tab of the Chubb Marketplace according to the following table.

In addition, we are beginning the migration of policies originally placed through Fast TrackSM or Policy Decisions (i.e. pre-Marketplace) into the Marketplace. This will begin for policies with a renewal effective date of October 22, 2018.

Product Line	For Policies Originally Issued in the Marketplace	For Policies Originally Issued in Fast Track or Policy Decisions
	<i>(Days prior to the renewal effective date)</i>	
Chubb BOP	90-days	75-days
Umbrella	90-days	75-days
Workers' Compensation	90-days	90-days
Commercial Auto	75-90 days	75-90 days
Cyber Enterprise Risk Management (ERM)/DigiTech [®] ERM	90-days	Coming Soon*

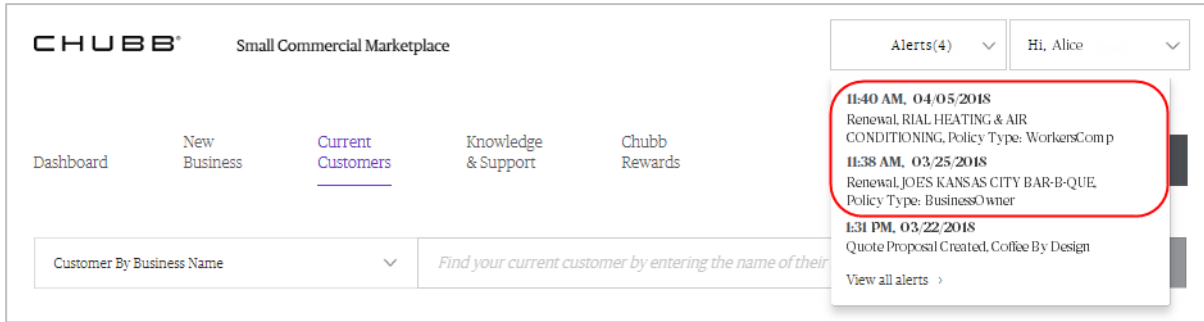
**Please note, Cyber ERM/DigiTech ERM policies issued in Fast Track (i.e. pre-Marketplace) will be available in the Marketplace beginning August 20, 2018.*

G. Upcoming renewals will issue and billing statements will become available in the Chubb Marketplace according to the following table:

Product Line	Issue Date for All Policies	Billing Statement Available for All Policies*
	<i>(Days prior to the renewal effective date)</i>	
Chubb BOP	30-days	19-days
Umbrella	30-days	19-days
Workers' Compensation	30-days	19-days
Commercial Auto	75-90 days	19-days
Cyber ERM/DigiTech ERM	30-days	19-days

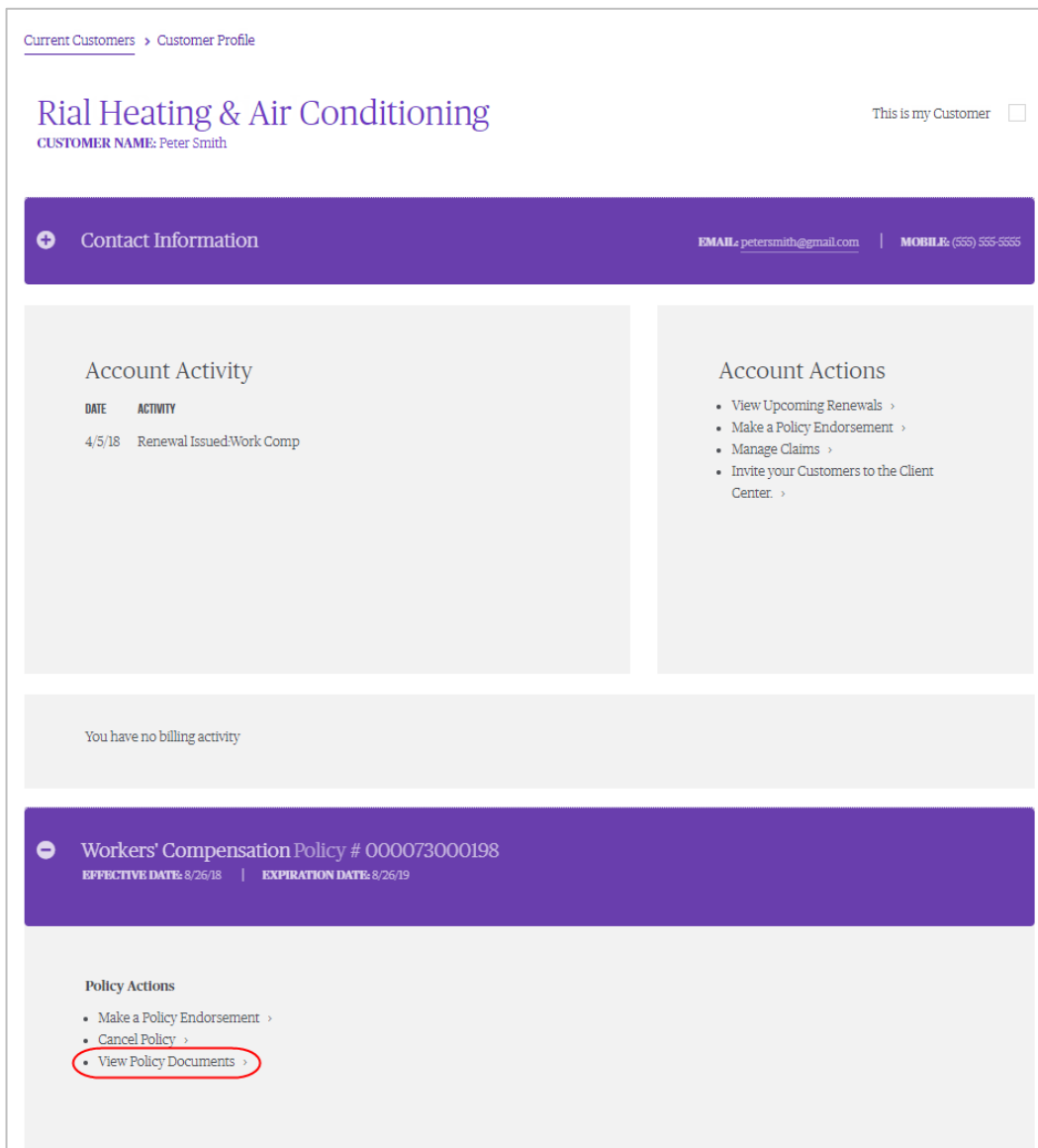
**Billing statements will also be mailed 19-days prior to the renewal effective date.*

H. You will receive alerts* when upcoming renewals are added to the Renewals tab or when upcoming renewals are issued.



**Please note, alerts will not generate for commercial auto renewals.*

I. Once the upcoming renewal has been issued, you can find your client's policy documents in their Customer Profile.



J. If your clients are not registered for the Chubb Commercial Client Center, invite them to activate their account!

Once their account is activated, your clients will be able to see their policy documents and billing activity just by accessing the Chubb Commercial Client Center.

Current Customers > Customer Profile

Rial Heating & Air Conditioning

CUSTOMER NAME: Peter Smith This is my Customer

+ Contact Information EMAIL: petersmith@gmail.com | MOBILE: (555) 555-5555

Account Activity

DATE	ACTIVITY
4/5/18	Renewal Issued:Work Comp

Account Actions

- View Upcoming Renewals >
- Make a Policy Endorsement >
- Manage Claims >
- Invite your Customers to the Client Center. >**

Invite your customer to the Chubb Commercial Client Center. ✕

Please enter your customer's name and email address to send an invitation to activate the Chubb Commercial Client Center, which provides direct access to view, pay bills, and download policy documents.

CUSTOMER'S FIRST NAME

CUSTOMER'S LAST NAME

CUSTOMER'S EMAIL ADDRESS

Send an Invitation Email

Chubb. Insured.SM

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