

Chubb Marketplace

Renewals Quick Reference Guide

March 2022



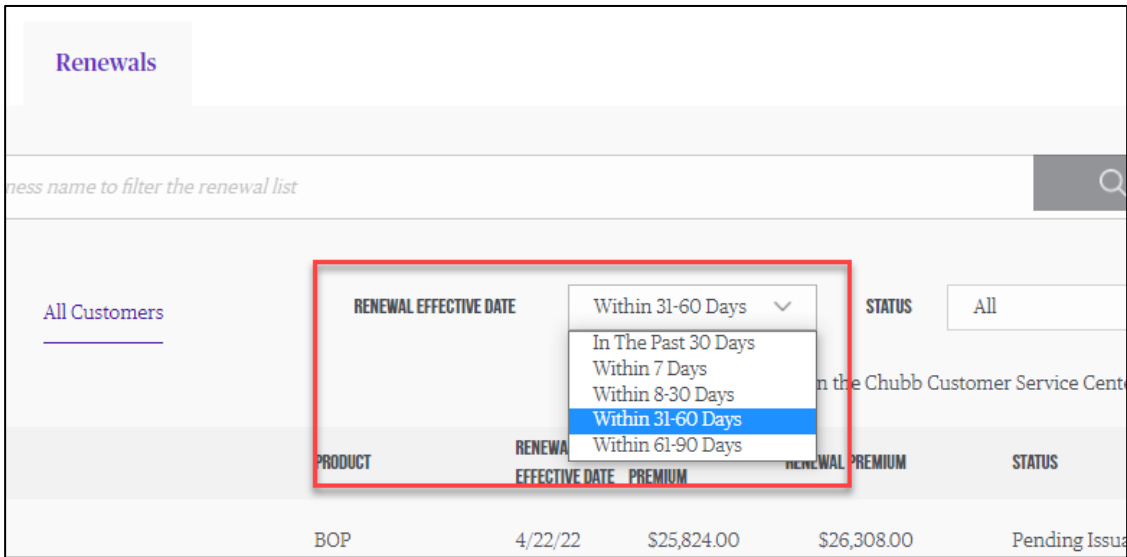
Upcoming Renewals can easily be viewed on Marketplace through the **Current Customer** section and then on the **Renewals** tab.

The screenshot shows the Chubb Marketplace interface. At the top, there is a navigation bar with the Chubb logo, 'Marketplace', and user information (Alerts(60) and Hi, Allie). Below this is a secondary navigation bar with links for Dashboard, New Business, Current Customers (highlighted with a red box), Knowledge & Support, and Chubb Rewards. A 'Start New Quote' button is also present. A search bar for 'Search Customer By Business Name' is located below the navigation. The main content area is titled 'Current Customers' and has two tabs: 'Customer List' and 'Renewals' (highlighted with a red arrow). Below the tabs is a search bar for filtering renewals by business name. There are also filters for '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. At the bottom, a table header is shown with columns: BUSINESS NAME, PRODUCT, RENEWAL EFFECTIVE DATE, EXPIRING TERM PREMIUM, RENEWAL PREMIUM, and STATUS.

You can toggle the list between **My Customers** (those customers where you have checked “This is My Customer”) and **All Customers** at your agency by selecting the title.

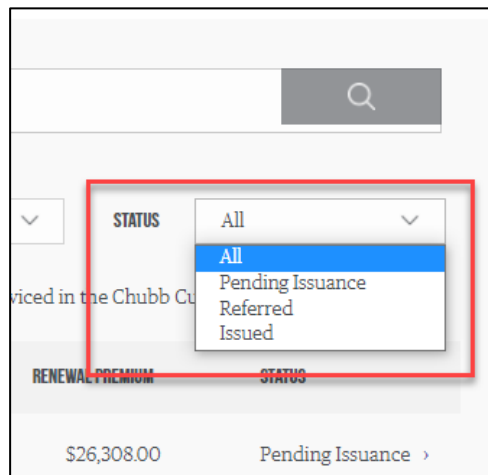
This is a close-up screenshot of the 'All Customers' tab in the Chubb Marketplace interface. The tab is highlighted with a red box. Above the tab is a search bar with the placeholder text 'Enter the business name to filter the renewal list'. Below the search bar are two tabs: 'My Customers' and 'All Customers' (highlighted with a red box). To the right of the tabs is a filter for 'RENEWAL EFFECTIVE DATE'. Below the tabs is a table header with columns: BUSINESS NAME, PRODUCT, RENEWAL EFFECTIVE DATE, EXPIRING TERM PREMIUM, RENEWAL PREMIUM, and STATUS. The table shows two rows of data: one with 'BOP' and one with 'UMBRELLA'.

Renewals are issued 30 days prior to the effective date. You can filter your view of the **Renewal Effective Date** from the drop down under the search bar.



You can also filter your view by the **Status**. You can sort by three of the four possible statuses.

1. **Pending Issuance.** The upcoming renewal is approved and will be issued 30 days ahead of the Renewal Effective Date.
2. **Referred.** The upcoming renewal has been referred to Underwriting for review.
3. **Issued.** The policy has been issued and is in force as of the Renewal Effective Date. These policy documents are available on Marketplace in the Customer Profile.
4. The non-filterable **Non-Renewal** status indicates that an Underwriting decision was made to not renew the policy.



If you see a **purple icon** next to the Renewal Premium, this is an indication that the Renewal Premium has increased over 10% from the last term. You can simply click on this icon for specific premium information.

The screenshot shows the 'Current Customers' interface with the 'Renewals' tab selected. A search bar is at the top, and filters for 'RENEWAL EFFECTIVE DATE' (Within 31-60 Days) and 'STATUS' (All) are visible. A table lists renewals with columns for Product, Renewal Effective Date, Expiring Term Premium, Renewal Premium, and Status. A callout box highlights a renewal with a 13% increase in premium.

PRODUCT	RENEWAL EFFECTIVE DATE	EXPIRING TERM PREMIUM	RENEWAL PREMIUM	STATUS
BOP	4/22/22	\$4,624.00	\$5,225.00	Pending Issuance
BOP	4/22/22	\$2,538.00	\$2,459.00	Pending Issuance
WORK COMP	4/22/22	\$1,144.00	\$1,390.00	Pending Issuance

If you click on the actual **Status** for your customer, you will be brought to a Renewal Summary page which will provide you with a consolidated view of the Renewal Effective Dates, Status, and Expiring/Renewal Premium.

The screenshot shows the 'Renewal Summary' page for a customer. It displays a table of renewals with a red box around the 'Pending Issuance' status. Below the table, the 'Renewal Summary' section provides detailed information for a specific policy.

PRODUCT	RENEWAL EFFECTIVE DATE	EXPIRING TERM PREMIUM	RENEWAL PREMIUM	STATUS
BOP	4/22/22	\$4,624.00	\$5,225.00	Pending Issuance
BOP	4/22/22	\$2,538.00	\$2,459.00	Pending Issuance
WORK COMP	4/22/22	\$1,144.00	\$1,390.00	Pending Issuance
BOP	4/22/22	\$1,467.00		
BOP	4/23/22	\$1,776.00		
BOP	4/23/22	\$876.00		
WORK COMP	4/24/22	\$1,937.00		

Renewal Summary

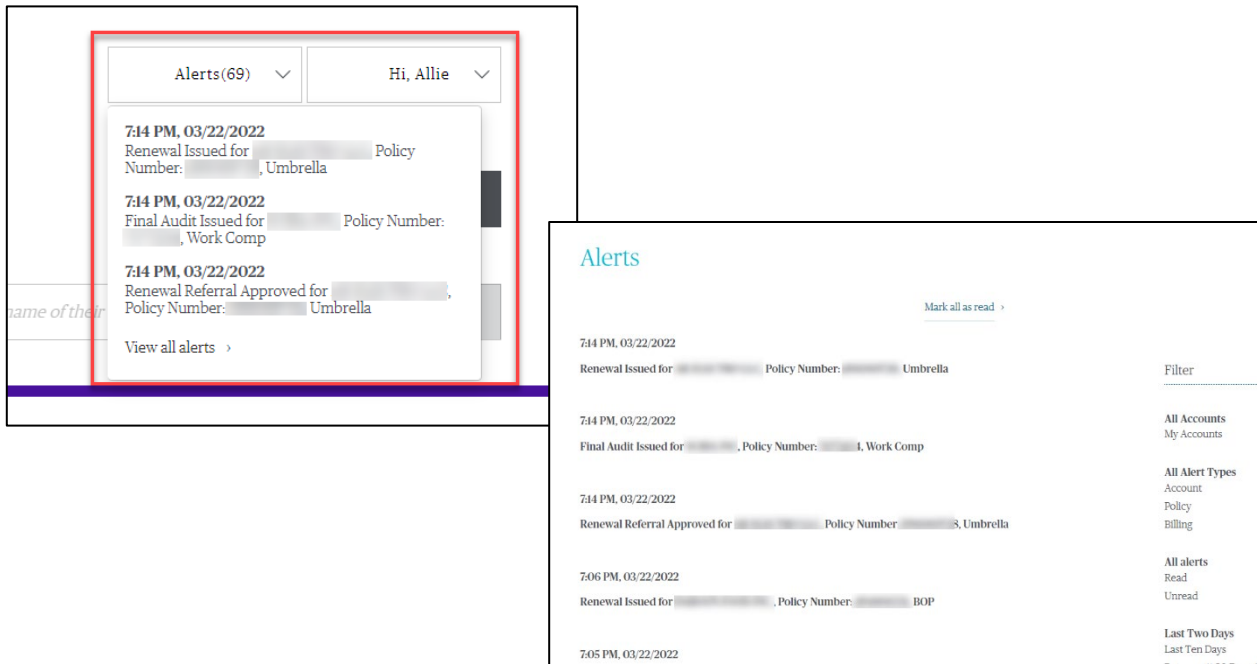
CUSTOMER NAME: BOP - [REDACTED] **POLICY NUMBER:** BOP - [REDACTED] **PRIMARY INSURED ADDRESS:** 2005 MAIN ST

POLICY EFFECTIVE DATE: 4/22/22 **POLICY EXPIRATION DATE:** 4/22/23

STATUS: Pending Issuance

EXPIRING TERM PREMIUM: \$2,538.00 **RENEWAL PREMIUM:** \$2,459.00

Alerts are generated as your customer's Renewal is processed. You can find these alerts either on the home page or on the **Alerts** page.



For more information, please contact your Chubb Small Business territory sales leader.

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