

ETCETERA® EPM FOR INSURANCE

ETCETERA® Enterprise Process Management (EPM) software is flexible enough to provide insurance companies with hundreds of solutions across the enterprise. Companies can rapidly design, develop and deploy applications. In most cases the design is done by non-technical employees.

Current forms can be replaced using EPM, which is comprised of application design, online data capture, integration with host applications, automated routing and collaboration with signature capabilities, report generation and legal/audit storage and access.

The Application User Interface (AUI) can be designed for either online or offline use by employees, agents, brokers, third parties or policyholders.

Some process areas with multiple forms which provide optimization opportunities utilizing EPM include:

- Insurance applications – online and offline
- Field inspections and reports
- Medical reviews
- Workers Compensation payroll submissions
- Loss reviews
- Policy changes
- Policyholder services
- Premium invoice issuance and payments
- Agent policy changes

INSURANCE (Examples of AUIs)

Below is a sample list of forms used in insurance companies that could be replaced using ETCETERA® EPM. The AUI design can be accomplished in as little as one (1) hour per page and can be rapidly expanded and deployed throughout the entire company.

Accounts Receivable/Valuable Papers	International Property Exposure Supplement
Additional Interest Schedule	Inventory Form
Additional Premises Information Schedule	Livestock Mortality Section
Agency Questionnaire	Management, Executive & Professional Lines - Applicant Section
Agent/Broker of Record Change	Medical Professional Liability Insurance Application
Agriculture Application	Medical Statement
Agriculture Liability Section	National Flood Insurance Program - Flood Insurance Application
Agriculture Property Section	NFIP - Flood Insurance Cancellation / Nullification
Agriculture Supplement - Unscheduled Farm Personal Property	NFIP - Flood Insurance General Change Endorsement
Aircraft Insurance Binder	NFIP - Flood Insurance Preferred Risk Policy Application
Aircraft Schedule	Notice - Offer of Terrorism Coverage
Airport Property Supplement	Number Edition Title Quantity
Application Supplement	P&C Agency Appointment Form
Auto Accident Information Form	P&C Producer Appointment Form - Appointment Section
Automobile Insurance ID Card	P&C Producer Appointment Form - Background Questions
Automobile Loss Notice	Personal Auto Policy Change Request
Aviation Insurance Application	Pilot Experience Schedule
Aviation Insurance Binder	Policy Certification Log
Aviation Products Liability	Policyholder's Report
Business Auto Section	Premium Payment Supplement
Business Income / Extra Expense / Rental Value	Private Hangar Liability Section
Business Owners Application	Producer Account
Cancellation Request / Policy Release	Producer Account Discrepancy Notice
Certificate of Liability Insurance	Producer Appointment Form
Certificate of Property Insurance	Professional / Specialty Insurance Application
Certification of Mobile Home Tie-downs Supplement	Property Insurance Card
Commercial Auto Driver Information Schedule	Property Loss Notice
Commercial General Liability Section	Railroad Protective Liability Supplement
Commercial Insurance Application	Residence Based Business - Supplement to Residential Section
Commercial Policy Change Request	Residential Property Replacement Cost
Directors & Officers Liability Section	Schedule of Insurance
Driver Work / School Address Information Supplement	Settlement Notice
Driver Exclusion Form	Small Farm/Ranch Application
Electronic Data Processing Section	Solid Fuel Questionnaire - Supplement to Residential Section
Employment Practices Liability Insurance Section	Statement of No Loss
Equine Liability Supplement	Statement of Premium Adjustment
Equipment Floater Section	Statement/Schedule of Values
Evidence of Commercial Property Insurance	Supplement to Property Section
Evidence of Property Insurance	Surety Report of Execution
Exchange of Information Form	Termination of Coverage
Fiduciary Liability Coverage Section	Transportation Section
Financial Responsibility Form	Truckers / Motor Carrier Supplement
Financial Responsibility Form - Cancellation	Truckers / Motor Carriers Section
Flood Insurance Selection / Rejection	Umbrella Section
Forms and Endorsements Schedule	US Insurance Supplement - Standard Fire Policy Only
Fraud Statements	Value Reporting Information Supplement to Property Section
Garage and Dealers Section	Vehicle or Equipment Certificate of Insurance
General Liability Notice	Vehicle Schedule
Glass And Sign Supplement	Witness Card
Hangar Schedule	Workers Compensation - First Report of Injury or Illness
Hotel/Motel Supplement	Workers Compensation Application
Installation/Builder's Risk Section	Workers Compensation Insurance Plan - Assigned Risk Section
Insurance Supplement - Notice - Offer of Terrorism Coverage	Yacht Section
Insurance Supplement - Workers' Compensation Only	Young Driver Questionnaire
International Liability Exposure Supplement	



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