



## How to Utilize Policy Checklist in Slate

We have introduced a new feature called **Policy Checklist** for agents. This works like a to-do list, helping track and provide any outstanding documents needed for new business verification.

A **Policy Checklist** popup will now appear immediately after binding a policy, providing a clear understanding of what needs to be completed and submitted for Underwriting.

Initial Popup:

The initial popup features a large orange exclamation mark icon at the top. Below it, the text reads: "Thanks for binding this policy with People's Trust. We appreciate your partnership!". This is followed by the heading "Here's what happens next:" and a numbered list of two items: 1. Schedule a PTI Home Inspection (with a detailed description of the process and a phone number) and 2. Submit Required Documentation (with a description of the required documents). At the bottom, there is a note about uploading documents and a "View Policy Checklist" button next to a "Skip" button.

Thanks for binding this policy with People's Trust. We appreciate your partnership!

Here's what happens next:

- 1. Schedule a PTI Home Inspection**  
In the coming days, the insured can expect to receive a phone call from Home Inspections Services to schedule their required interior and exterior home inspection. Should you or the insured prefer to contact them directly to schedule the appointment, the phone number is 561-609-1003.
- 2. Submit Required Documentation**  
Based on the policy submission, Underwriting requires 4 documents to support the selections entered.
  1. People's Trust Application
  2. Home Inspection completed by People's Trust Insurance Company approved vendor
  3. Proof of Prior Insurance
  4. Final Roof Permit Documentation

To upload the requested documents and view the submission progress with real time underwriting review, click the Policy Checklist icon below.

[View Policy Checklist](#) [Skip](#)

Reminder Popup:

The reminder popup features a large orange exclamation mark icon at the top. Below it, the text reads: "Thanks for binding this policy with People's Trust. We appreciate your partnership!". This is followed by the text: "Based on the policy submission, the following required items remain outstanding. Underwriting requires these documents to support the selections entered." and the heading "The following required items are outstanding:". Below this is a numbered list of five items: 1. People's Trust Application, 2. Home Inspection completed by People's Trust Insurance Company approved vendor, 3. Proof of Prior Insurance, 4. Wind Mitigation Inspection, and 5. Proof of Military. At the bottom, there is a "View Policy Checklist" button next to a "Skip" button.

Thanks for binding this policy with People's Trust. We appreciate your partnership!

Based on the policy submission, the following required items remain outstanding. Underwriting requires these documents to support the selections entered.

The following required items are outstanding:

1. People's Trust Application
2. Home Inspection completed by People's Trust Insurance Company approved vendor
3. Proof of Prior Insurance
4. Wind Mitigation Inspection
5. Proof of Military

[View Policy Checklist](#) [Skip](#)

*(note: popup contents will be different based on individual policy requirements)*

Agents can upload documents directly through the feature, and the system will automatically tag them accordingly.

To view the Checklist, click the **View Policy Checklist** button. Otherwise, click **Skip** to dismiss and come back later. You can also access the information by navigating directly to the Checklist tab. As documents are uploaded, statuses will automatically update until they are approved.

A popup will appear as a reminder each time you navigate to the policy's Summary tab, until all requirements are uploaded.

Policy Checklist - PFL465673-00

Policy / Policy Checklist

Policy Term PFL465673-00 - Active

**Policy Information**

Status Active

Effective 08/20/2025 - 08/20/2026

Policy Type HO-3

**Inspection Status**

Inspection Status Pending IMS Transfer

Scheduled Date

Completed Date

For scheduling or rescheduling inspections, please call Home Inspection Services at (561) 609-1003.

**Alternative Option!** Submit a Pre-Purchase Home Inspection to waive the PTI Home Inspection requirement.

**Required Documents**

2 Not Attached 0 Not Approved 7 Pending Review 0 Reviewed Print Forms

Required Document	Document Status	
Wind Mitigation Inspection Photos	Pending Review	
Home Inspection completed by People's Trust Insuranc...	Pending Review	
Final Roof Permit Documentation	Pending Review	
Proof of Flood Insurance	Pending Review	
Contents Exclusion Form	Pending Review	
Proof of Military	Pending Review	
Wind Mitigation Inspection	Pending Review	
HUD/Settlement Statement or Warranty Deed	Not Attached	
People's Trust Application	Not Attached	

1 10 items per page 1 - 9 of 9 items

On the Policy Checklist page, there are three panels:

1. **Policy Information** panel: displays basic policy information including Status, Policy Term, and Policy Type.
2. **Inspection Status** panel: displays Inspection-related information on applicable policies, including Status, Scheduled Date, Completed Date, and Home Inspection Services contact information.
  - To schedule/reschedule inspections: Home Inspection Services: (561) 609-1003
  - If the home is a new purchase, a Pre-Purchase Home Inspection may be submitted in order to waive our inspection requirement
3. **Required Documents** panel: displays all applicable required documents on a policy, with statuses. Agents also have the ability to print the application or any other forms by clicking **Print Forms** on the right.

Document Status Indicators:

- Not Attached: No attachment has been uploaded for the document
- Pending Review: Attachment has been uploaded and is pending review
- Not Approved: Attachment has been reviewed and is not acceptable
- Approved: Attachment has been reviewed and approved by Underwriting