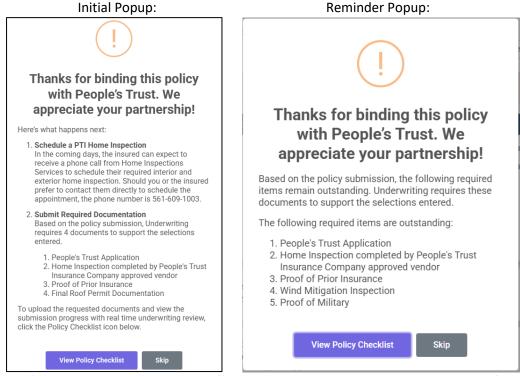## How to Utilize Policy Checklist in Slate

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.
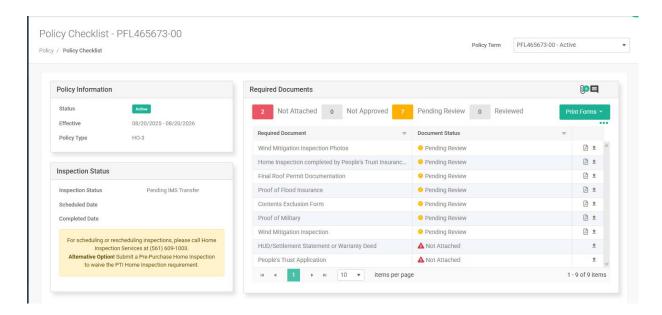
Initial Popup: Reminder Popup:

(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.

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