



***Massachusetts Dwelling
General Agency – Follow Up Items***

Effective: 09/01/2016 New 09/01/2016 Renewal

Clue Reports – Required on all new business:

The ordering of a CLUE report is an integrated step in the iReli application process. If a loss is returned by CLUE, and it is determined it does not apply to the applicant, the Producer can select “N” (no) for the loss not to be used in determining the acceptability of the risk. Those applications/ policies that where the loss has been waived, should be reviewed by the General Agent for accuracy. The “CLN” column on the New Business Report corresponds to this situation and any “N” response requires justification documentation.

Inspections:

Inspections are required on all new business risks over 20 years old.

Photos:

- ✓ Photos are required of all supplemental heating devices that are not professionally installed.
- ✓ General Agents can request photos of a risk for any other reason.
- ✓ Photos should be maintained by the General Agent and available upon Home Office request.

i-Reli – Follow Up Item Checklists:

The iReli Follow up Checklist prints for each policy issued along with the policy receipt. It provides the Producer with a list of additional documentation required for this policy. The follow up items should be received by the General Agent within five business days to verify risk acceptability. If it is not received within this timeframe, policy cancellation is recommended. The General Agent can print a copy of this checklist for their reference.