

**jacketTRAX** is our online application within the agentTRAX suite for the issuance of Policy and Commitment jackets.

Information collected during the issuance of a jacket includes liability, gross premium, rate codes and issued endorsements for Auto Reporting of the premium due to our Agency Accounting department.

- Eliminates the need to prepare a monthly remittance report, saving time and reducing the chance for errors.
- Allows you to select items as your favorites to reduce the time spent generating jackets – just fill in the star next to any item.

Jackets and endorsements available for selection are filtered based on the **Property Type** and **Effective Date**.

If the liability entered on the policy exceeds the agent's contractual limit, a reminder to obtain a High Liability Approval (HLA) is presented.

- jacketTRAX will **NEVER** prevent the issuance of the jacket in the instance where the HLA has not been submitted and/or approved.

The ability to report **Other Fees/CPL Fees** is presented where applicable.

- If there is a CPL letter issued for the same agent ID and file number, that CPL will be presented for review and the applicable fee will be defaulted with the ability to edit or delete.

The summary section of jacketTRAX provides the breakdown of *Gross* and *Net* premiums at the file or policy level.

Policies can be edited to add subsequently issued endorsements for reporting to our Agency Accounting department.

The **File Details** report, which shows a breakdown for each item in the file, can be printed automatically with the policy jacket(s) by selecting "*Submit with File Details Report*".

You may enter your check number and check amount to assist in reconciling your premium A/R (for your reference only – this does not update Agency Accounting).

Jackets can be saved to your jacket cart by selecting "*Save*" versus "*Submit*".

Issued and reported policies are always available for reprint.

**Jacket Cart** is our online application within the agentTRAX suite that allows jacketTRAX users to save jacket information prior to issuance and for later editing.

To save a jacket to the Jacket Cart, select *Save* instead of *Submit* in the jacketTRAX application screen.

Jackets in the Jacket Cart are not deemed issued and will remain in the cart until printed or deleted.

Users will see all jackets in the cart for all agent IDs that they have access to – not just jackets that they have saved to the cart.

The user can generate (issue) or delete one or more jackets in the cart at the same time.

Users have the ability to search for items in the cart using the search bar, or may use the column sorting option.