

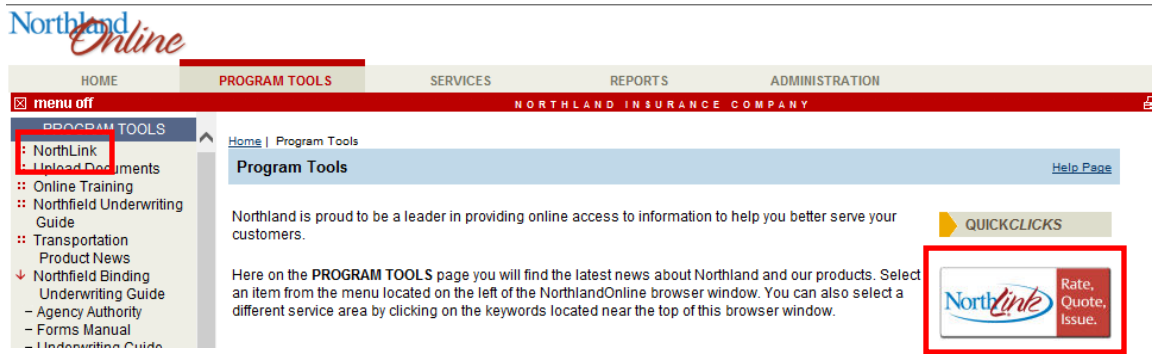


## Loss Runs, Claim Inquiry and Underwriting Summary Functionality in NorthLink® Northfield Agent Reference Guide

In our continuing efforts to utilize NorthLink® for all our policy/quote needs, we are replacing existing Loss Run, Claim Inquiry and Underwriting Summary functionality in NorthlandOnline with new functionality in NorthLink®. This is an exciting change that allows us to take advantage of new technology and provides users with better capabilities for reviewing, printing and analyzing claim and underwriting information.

**Note: Effective immediately, you will no longer have the option to open Loss Runs, Claims Inquiry or Underwriting Summary from NorthlandOnline. They will only be available in NorthLink®.**

To access these functions, click NorthLink® from the Quick Click or the Program Tools menu in NorthlandOnline:



Once NorthLink® is open, you will be able to access Loss Runs, Claim Inquiry and Underwriting Summary from the Main Menu or the policy/quote sub-portal.

From the NorthLink® Main Menu:

NorthLink

HOME WIP SUBMISSION USER ADMIN

menu off print

Welcome

## Welcome to NorthLink®

### What's New Report

A red Asterisk \* denotes required rating information

**NorthLink Availability: (Central Time)**

NorthLink will be unavailable during the time listed below:

**Saturday, February 9, and Sunday, February 10, 2008 for the February version build.**

**Version Status: January 14, 2008 - Version 3.010**

Please refer to the Northfield and Northland Transportation NorthLink Build Bulletins 2.120 for system changes and enhancements. The bulletins were e-mailed to all NorthLink users on Friday, January 11.

Do You Have Questions or Need Assistance? [Contact the Northland Agency Automation Help Desk](#) at 800-363-2242.

Northland INSURANCE

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Northfield Underwriting Guide

HOME

- HOME
- Search
- SL Quick Quote
- Inquire/Notes
- Edit Quote
- Start Renewal
- Bind
- Issue Policy
- View Documents
- Upload Documents
- Endorse/Chg Policy
- Data Update
- Monthly Reports
- Extend Policy
- Cancel
- Reinstate
- Issue Certificates
- Underwriting Summary**
- Claim Inquiry**
- Loss Runs**
- Trans UW Guides
- Record
- Declined
- Not Taken
- Non-Renew
- Rescind Non-Renewal

From the NorthLink® policy sub-portal:

Northfield Underwriting Guide

### Policy Insured

Policy #: **WS412015** Effective Date: **11/4/2016** Tran Date: **11/4/2016** Pay Method: **Agency Bill**

Name: **D & B Enterprises, Inc.** Referral: **N** Notes: **N** File Review: **N**

Company: **Northfield Insurance Company** Agent:  NIC Claims 3 Yrs: **Y**

Description:

Renewal Description

Effective Date\* **11/04/2016** Expiration Date\* **11/04/2017**

Product\* **Northfield** Binding

Company\* **Northfield Insurance Company** Primary Risk State\* **California**

Client Names

Name	DBA Name	Address	City	State	Zip	Incl	Seq	Added	Deleted
D & B Enterprises, Inc.		5850 Sagebrush Rd	La Jolla	CA	92037	<input checked="" type="checkbox"/>	1	11/04/2016	

1 - 1 of 1 records

prev 1 next

Northfield Underwriting Guide

NEW BUSINESS/RENEWAL

- New Business/Renewal
- Client Info
- Policy/Insured Info
- Line of Business
- Previous Insurer
- Prior Loss Info
- Location
- GL Classification
- GL Exposure
- GL Limits/Deductibles
- Property
- Property Bldg/Items
- Pre-Pricing
- Pricing
- Final Premium
- Forms Selection
- Quote Letter
- Notes
- FileNet Documents
- Upload Documents
- Underwriting Summary**
- Claim Inquiry**
- Loss Runs**

The functionality for each of these options is the same whether you access it from the Main Menu or the sub-portal. Each process is described below. Please contact Agency Automation Customer Service or your Account Executive if you have questions on this new functionality.

## Loss Runs

When you click the Loss Runs option, you will be brought to the Loss Runs search screen. Search options are available for Policy Number and Insured Name, and a checkbox is available for generating Batch Loss Runs.

If you select Batch Loss Runs, a screen will display for entry of up to 10 policy numbers and an option to generate the loss runs:

If you enter a policy number or insured name and click Search, search results will be returned in a grid. Select the policies to be included in the loss run and click Basic Loss Run to generate the loss run:

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Policy Number	Insured Name	Effective Date	Expiration Date	Loss Count	Reserve Count	Cancel Date	State	Agent #
WS220571	BILL JOHNSON	08/23/2014	08/23/2015	1	0		CA	995000

Once you click Basic Loss Run, the system will generate the new format Loss Runs with all information that was previously included in your Northland *Online* loss runs. We have updated them to generate in portrait format and in a pdf for ease of printing, sending and saving. An example is shown below:

Generate PDF - Microsoft Internet Explorer provided by The Travelers Companies, Inc.

1 / 1 66.7%

Comment

Bookmarks

- MEMO
- CLAIMS, CLAIMS INQUIRY
- Loss Run - Basic
- Page 1

**LOSS RUN - BASIC**  
 This Loss Run was generated: 8/24/2016 3:37 PM Eastern Time Zone

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Policy No.	Policy Period	Cancel Date	Insured Name	Company
WS220571	8/23/2014 - 8/23/2015		BILL JOHNSON	Northfield Insurance Company

Total # of Losses for Run: 1

Loss Run	# Losses	Company	Effective	Cancel Date	Insured Name
WS220571	1	Northfield Insurance Company	8/23/2014		BILL JOHNSON

Loss #	Date of Loss	Date Reported	Cause of Loss	Over. Age
1	1/7/2015	1/7/2015	Fire; Unexplained Circumstances	, 0

Location: 133 S. COAST HIGHWAY, SAN DIEGO, CA, SAN DIEGO  
 Details: FIRE DAMAGE TO HOTEL.

Claimant Loss Transaction Summary

001 JOHNSON, BILL	Loss Reserve:	Loss Paid:
FIRE & ALLIED LINES	\$ 89,195.60	\$ 620,804.40
BASIC GROUP I CAUSES OF LOSS	Expense Reserve: \$ 102,950.00	Expense Paid: \$ 37,559.99
	Total Reserve: \$ 192,145.60	Total Paid: \$ 658,364.39
Examiner:	Total Recovered: \$ 0.00	Total Incurred: \$ 850,509.99

002 SMITH, JOAN	Loss Reserve:	Loss Paid:
PREMISES/OPERATIONS	\$ 20,000.00	\$ 0.00
COMBINED SINGLE LIMITS	Expense Reserve: \$ 1,762.03	Expense Paid: \$ 12,062.97
	Total Reserve: \$ 21,762.03	Total Paid: \$ 12,062.97
Examiner: Slyn Wartick 800-328-5972	Total Recovered: \$ 0.00	Total Incurred: \$ 33,825.00

001 JOHNSON, BILL	Loss Reserve:	Loss Paid:
FIRE & ALLIED LINES	\$ 0.00	\$ 10,645.99
BASIC GROUP I CAUSES OF LOSS	Expense Reserve: \$ 0.00	Expense Paid: \$ 0.00
	Total Reserve: \$ 0.00	Total Paid: \$ 10,645.99
Examiner:	Total Recovered: \$ 0.00	Total Incurred: \$ 10,645.99

001 JOHNSON, BILL	Loss Reserve:	Loss Paid:
FIRE & ALLIED LINES	\$ 3,094.32	\$ 176,905.68
BASIC GROUP I CAUSES OF LOSS	Expense Reserve: \$ 27,000.00	Expense Paid: \$ 0.00
	Total Reserve: \$ 30,094.32	Total Paid: \$ 176,905.68
Examiner:	Total Recovered: \$ 0.00	Total Incurred: \$ 207,000.00

Loss Summary	23 WS220571-0001	Occurrence Is Open
Loss Paid	\$ 808,356.07	Expenses Paid \$ 49,622.96
		Reserve \$ 244,001.95
		Recovery \$ 0.00
		Total Incurred \$ 1,101,980.99

Policy Summary	# of Losses: 1	Insured Name	Cancel Date
WS220571	Policy Period: 8/23/2014-8/23/2015	BILL JOHNSON	
Policy	Losses Paid \$ 808,356.07	Expenses Paid \$ 49,622.96	Reserves \$ 244,001.95
Totals		Recoveries \$ 0.00	Total Incurred \$ 1,101,980.99

Summary for All Policies	Losses Paid	Expenses Paid	Reserves	Recoveries	Total Incurred
	\$ 808,356.07	\$ 49,622.96	\$ 244,001.95	\$ 0.00	\$ 1,101,980.99

Click the "X" in the upper right hand corner to close the Loss Run and return to the Loss Runs screen.

## Claim Inquiry

When you click the Claim Inquiry option, you will be brought to the Claim Inquiry search screen. Search options are available for Policy Number and Insured Name.

HOME WIP SUBMISSION USER ADMIN UTILITIES

☒ menu off

Northfield Underwriting Guide

HOME

☾ ::HOME  
::Search  
::SL Quick Quote  
::Inquire/Notes

Claim Inquiry

Policy Number

Insured Name

Search

When you enter a policy number or insured name and click Search, a grid will display basic claim information, including claim number, date of loss, insured name, date reported, status, total incurred, driver (if applicable) and agent number, for all claims matching your criteria:

Claim Inquiry

Policy Number WS220571 x

Insured Name

Search

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Claim Number	Date of Loss	Insured Name	Date Reported	Status	Total Incurred	Driver	Agent #
Contains... <a href="#">23 WS220571-0001</a>	On... 01/07/2015	Contains... BILL JOHNSON	On... 01/07/2015	Cont Open	Equals... \$1,101,980.98	Contains...	Contains... 995000

1 - 1 of 1 records

prev 1 next

View

Highlight individual claims from the grid and click View or click the Claim Number link to view policy level claim information, including insured, policy detail, loss location, time of loss, and more as shown in the screen below:

**View** 23 WS220571-0001, DOL 1/7/2015 **OPEN**

**Insured:** BILL JOHNSON  
5850 SAGEBRUSH RD  
LA JOLLA, CA 92037

**Policy Detail:** Agent: NORTHLAND INSURANCE COMPANY POLICY INVENTORY MISC. 133 S. COAST HIGHWAY E & O  
Policy Effective: 8/23/2014  
Policy Expiration: 8/23/2015

**Loss Location:** SAN DIEGO, CA  
County: SAN DIEGO

Reported Date: 1/7/2015 Time of Loss: 050000 Loss Code: Fire:Unexplained Circumstances  
Loss Description: FIRE DAMAGE TO HOTEL.

**Loss Detail:** Driver Name: Driver Age: 0 Caller Name: Caller Relation: AGENT/FAX

**Financials Summary:** Loss Reserve: \$112,289.92 Expense Reserve: \$131,712.03 Total Reserve: \$244,001.95 Total Net Recovered: \$0.00  
Losses Paid: \$808,356.07 Expenses Paid: \$49,622.96 Total Paid: \$857,979.03 Total Incurred: \$1,101,980.98

**Claimant Detail:**

Claimant Number	Claimant Name	Year/Make	Product Description	Coverage Description	Type of Loss
001	JOHNSON, BILL	28NONE	FIRE & ALLIED LINES	BASIC GROUP I CAUSES OF LO	
002	SMITH,JOAN		PREMISES/OPERATIONS	COMBINED SINGLE LIMITS	
001	JOHNSON, BILL	28NONE	FIRE & ALLIED LINES	BASIC GROUP I CAUSES OF LO	
001	JOHNSON, BILL	28NONE	FIRE & ALLIED LINES	BASIC GROUP I CAUSES OF LO	

1 - 4 of 4 records

**View**

Cancel

To view claimant detail for an individual claimant, click the claimant number link. To view multiple claimants, highlight all claimants to be reviewed and click View. This will open the claimant detail:

**View** 002 - SMITH,JOAN

**Examiner Name:** Ryan Wartick **Examiner Phone:** 800-328-5872 **Year/Make:**

**Product:** PREMISES/OPERATIONS **Reserve Open Date:** 1/7/2015 **Injury:** Yes **Suit:** Yes

**Coverage:** COMBINED SINGLE LIMITS **Loss Close Date:** 1/19/2015 **# Days Loss Open:** 13

**Type of Loss:** **Expense Close Date:** 1/19/2015 **# Days Expense Open:** 13

**Financials Summary:** Loss Reserve: \$20,000.00 Losses Paid: \$0.00 Incurred Loss: \$20,000.00  
Expense Reserve: \$1,762.03 Expenses Paid: \$12,062.97 Incurred Expense: \$13,825.00  
Total Reserve: \$21,762.03 Total Paid: \$12,062.97 Total Incurred: \$33,825.00

Recovered Amount: \$0.00

#	Recovery Type	Recovery Open Date	Recovery Close Date	Recovery Examiner	Phone Number
01	Subrogation	01/19/2015	09/01/2015	Jeffrey Oberheim	262-641-6167

1 - 1 of 1 records

Next >> << Prev Cancel

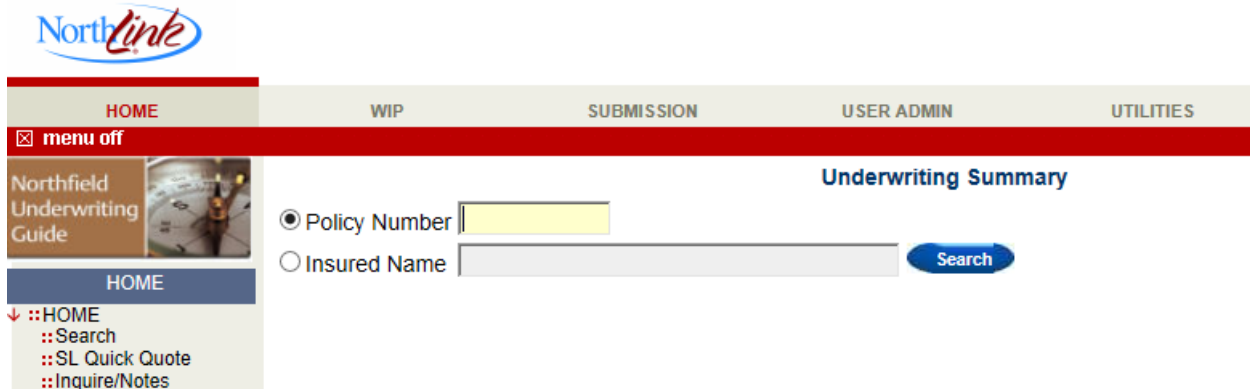
Record 2 of 3

Cancel

If multiple claimants were selected, use the Next and Previous buttons to move between individual claimants. Click Cancel inside the Claimant window to return to the Policy level detail or Cancel outside the window to return to the Claim Inquiry summary grid.

## Underwriting Summary

When you click the Underwriting Summary option, you will be brought to the Underwriting Summary search screen. Search options are available for Policy Number and Insured Name.



When you enter a policy number or insured name and click Search, the 5 Year Summary and Underwriting Summary will be displayed. Policy, term and accumulative information is available. You may need to scroll up and down or from side to side to see all information. Additionally, there is an option in the grid for Claim Inquiry.

Policy Number 
 Insured Name

**IMPORTANT - PLEASE READ:** The information on these screens is provided as a summary of loss, driver and correspondence activity. Please note that this is only a summary and should not be your only source for account information. The information is only as accurate as the information reported to us. Memos that were not sent via our correspondence system are not captured in this summary. In using this information, you agree and acknowledge that it is your responsibility to update and verify information, and to check your files for accuracy prior to binding.

5 Year Summary	
Total Loss and Expense Paid:	\$857,979.03
Total Loss and Expense Incurred:	\$1,101,980.98
Total Written Premium:	\$5,479.00

**BILL JOHNSON**

Policy Information					Term			Accumu		
Policy Number	Effective Date	Expiration Date	Loss Count	X Reserve Count	Written Premium	Loss and Expense Paid	Loss and Expense Incurred	Loss Ratio	Total Written Premium	Total Loss and Expense Paid
WS220571	08/23/2014	08/23/2015	1	0	\$5,479	\$857,979.03	\$1,101,980.98	20,112.8	\$5,479	\$857,979.03

1 - 1 of 1 records

prev 1 next

**Claim Inquiry**

The Claim Inquiry option can be used to view claim information on individual policies. To access the claims, simply highlight the row to be viewed and click Claim Inquiry. This opens the Claim Inquiry function and all claims matching your selection will display. Refer to the section on Claim Inquiry in this document for more detail on the information available.

### Claim Inquiry

Policy Number 
  
 Insured Name

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Claim Number	Date of Loss	Insured Name	Date Reported	Status	Total Incurred	Driver	Agent #
Contains...	On...	Contains...	On...	Cont	Equals...	Contains...	Contains...
<a href="#">23 WS220571-0001</a>	01/07/2015	BILL JOHNSON	01/07/2015	Open	\$1,101,980.98		995000

1 - 1 of 1 records

View [Back to Underwriting Summary](#)

Use the Back to Underwriting Summary to return to the Underwriting Summary screen when finished viewing the Claim Inquiry screen.

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