**PROFORMEX**

Guide to Policy Servicing

Proformex assists you in servicing your policies by streamlining the process to obtain annual statements and illustrations, keeping policy data updated for you, and automating policy reviews!

Document Requests	Document Processing	Policy Reviews
Document Request Sent	All Documents Received & Processed	Policy Review Opened
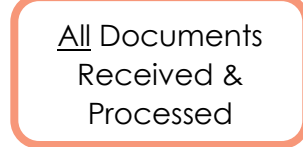
Document Requests

Track requests that have been sent out within the **Request History** tab

Click the 👁 icon to **View Request**

A follow-up request will be sent for outstanding documents **30 days** following the initial request for the policy

Document Processing

Once a request is sent, the policy will appear on the **Document Processing** table

Monitor status:
- View requests awaiting documents (indicated by the Upload button)

  ⬆ Upload

- View requests where ½ documents are processed (one column marked Complete)

  ⬆ Upload   ✓ Complete

- View requests undergoing processing (if it's in our queue it will show as Processing)
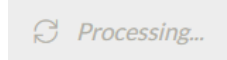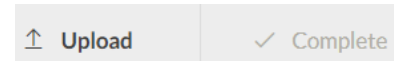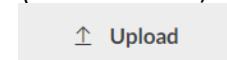
  ⟳ Processing...

Sort the table by Ordered date to find older requests

If the carrier does not fulfill the request following the second attempt, it is recommended to **contact the carrier directly**

Policy Reviews

Once Document Processing is complete, the policy will fall off that table and move to the **Policy Reviews > Open** table

Enroll in "**Policy Review is Ready to Finalize**" alerts to be notified via email when a policy review is opened

Settings ⚙ > **Notification Preferences**

The email notification will link to the policy in Proformex, scroll down to the **Reviews** tab to finalize

For additional questions, please refer to our Help Center or reach out to your Customer Success Manager