

Learn more in help topics on GAINSCOconnect

### Go to GAINSCOconnect.com Choose Reports

A robust set of Reports is available to help you maintain GAINSCO business

Set a calendar reminder to work reports a few times per week

REPORTS
Policies Issued
Policy Changes
Pending Cancellations
Canceled Policies
Renewal Offers
eSignature Report
Commission Statement
MVR Chargebacks
Sweep Reconciliation
Tasks

### Policy Reports

- ▶ **POLICIES ISSUED** Provides a list of new and renewal policies issued.
- ▶ **RENEWAL OFFERS** Shows a list of renewal offers issued, down payment has not yet been received. *Call customer to ensure they do not lapse.*
- ▶ **POLICY CHANGES** Returns a list of policies that have been endorsed.
- ▶ **eSIGNATURE REPORT** Gives the current status of eSignature for listed policies. *See help topics for step-by-step guide.*
- ▶ **PENDING CANCELLATIONS** Contains a list of policies that have been scheduled to cancel. *Call customer to prompt payment and prevent policy lapse.*
- ▶ **TASKS** List of outstanding items that need to be completed by your agency. *See help topics for step-by-step guide.*
- ▶ **CANCELED POLICIES** Provides a list of policies that have canceled. *Visit help topics to view reinstatement and rewrite information.*

### Agency Reports

- ▶ **COMMISSION STATEMENT** Displays detailed information about commission. (Available for Agency Admin Only)
- ▶ **MVR CHARGEBACKS** Shows how many reports were ordered, bound, and charged back along with detailed MVR order information. *Use to reconcile Commission Statement.*
- ▶ **SWEEP RECONCILIATION** Contains details of fund transfer from agency premium fund account or trust account.

## All About Reports

### Generating Reports

Most reports allow you to view information for a specified date range

- ▶ Choose the report date range

Report Date Range:  To

- ▶ Scroll right to see all information in the results returned

Insured	Policy Number	Policy Type	Policy Effective Date
SMITH, JOHN	OHPA00	New	12-23-2020

  

Package Create Date	Insured Email	Agent Email	Agent	Name Insured	Policy #	Method	Curr Stat
01/21/2021 5:04:43 PM	John.Smith1234@gmail.com		John Smith	John Smith	0000000	Not In Office	Exp

- ▶ Export the report to excel, pdf, or csv file if desired

### Commission & MVR Chargeback

Together, Commission Statements and the MVR Chargeback report explain your agency's earnings

COMMISSION STATEMENT			
From 01/01/2021 To 01/31/2021			
Page: 1	Current Statement: 02/02/2021		
<b>Agent Information</b>		NBW New Business CAN Cancellations END Endorsements NSF NSF Adjustments MVR MVR Order Charge Back	REN Renewals REI Reinstatements IMS Installments CCB Comm. Charge Back

GAINSCO will absorb all MVR report costs if you bind at least 70% of all MVRs ordered within 60 days of quoting

If this threshold is not met, commission earned may be offset by MVR Chargebacks

MVR ChargeBack Detail List	
Statement Date:	08/31/2020
Producer:	

  

Monthly Summary	
Minimum Conversion Rate:	70%
MVRs Ordered	3
MVRs Bound	1
Chargeable MVRs	2
Monthly Charge	\$ 10

\*For illustrative purposes only. MVR fees vary by state. See report for details.

Visit help topics for detailed information about MVR Chargebacks

## INSIDER SCOOP

### Manage Sweep Reconciliation & Tasks

Go to GAINSCOconnect.com > Reports and choose Sweep Reconciliation or Tasks. Then, follow steps for

- S** Sweep Reconciliation or **T** Tasks below.
- S<sub>1</sub>** Choose **REPORTS** from the Quote & Policy Center menu
- T<sub>1</sub>** **URGENT TASKS** due today automatically appear here, complete immediately
- T<sub>2</sub>** **VIEW ALL TASKS** for your agency, pick up tasks, or work your personal My Tasks list
- S<sub>2</sub>** Enter filter criteria and generate Sweep Reconciliation Report

Reports GAINSCOconnect Main Menu

Tasks

Due Date	Title	Policy/Quote #
4/20/2021	POP Review Agency	OHPAZ100XX

Agency Sweep Reports

\* indicates a required field.

Listing:  Search By:  From Date:  To Date:  Agency:

Sweep Date	Payment Date	Agent	Policy	Insured	Bank Account	Payment Type	System	User ID	Amount
2020-09-22	2020-09-22	AR00	OHPA000	ALEX TEST.	****	SW			\$
2020-09-24	2020-09-23	AR00	OHPA000	ALEX SWEE.	****	SW			\$
2020-09-22	2020-09-21	AR00	OHPA000	ALEX TASK.	****	SW			\$