

Learn more in help topics on GAINSCOconnect

## Go to GAINSCOconnect Choose Reports

A robust set of Reports is available to help you manage 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
Chargeback Projection
Sweep Reconciliation
Tasks
State App Chargebacks

### 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)
- ▶ **SWEEP RECONCILIATION** Contains details of fund transfer from agency premium fund account or trust account.
- ▶ **STATE APP CHARGEBACKS** List of state appointment fees and related Business or Individual Name that have been charged back.

## 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

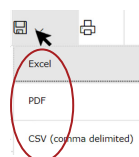
- ▶ Scroll right to see all information in the results returned

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

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

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



<input type="button" value="PDF"/>	View Details
<input type="button" value="PDF"/>	View Details
<input type="button" value="PDF"/>	View Details

### Commission Statements

Commission Statements explain your agency's earnings for the given period

**COMMISSION STATEMENT**  
From 05/01/2022 To 05/31/2022

Page: 1  
Current Statement: 06/06/2022  
Agent Information: AGENCY, INC. AXXXXX  
Agency Address: Dallas TX 75219

Policy Number	Insured Name	Transaction Date	Premium	Commission	Comm %
VAPA0007401	JOHN DOE	05/06/2022	XXX.XX	XX.XX	XX.XX
VAPA0008724	JOHN DOE	05/09/2022	XXX.XX	XX.XX	XX.XX
VAPA0010370	JANE DOE	05/23/2022	XXX.XX	XX.XX	XX.XX
VAPA0010595	JOHN DOE	05/25/2022	XXX.XX	XX.XX	XX.XX
VAPA0011429	JANE DOE	05/06/2022	XXX.XX	XX.XX	XX.XX
VAPA0011429	JOHN DOE	05/06/2022	XXX.XX	XX.XX	XX.XX
VAPA0011429	JOHN DOE	05/06/2022	XXX.XX	XX.XX	XX.XX
VAPA0011429	JANE DOE	05/06/2022	XXX.XX	XX.XX	XX.XX
VAPA0011429	JOHN DOE	05/06/2022	XXX.XX	XX.XX	XX.XX
VAPA0011592	JANE DOE	05/05/2022	XXX.XX	XX.XX	XX.XX
VAPA0013504	JOHN DOE	05/03/2022	XXX.XX	XX.XX	XX.XX

### REASON CODES

NEW	New Business	REI	Reinstatments
CAN	Cancellations	INS	Installments
END	Endorsements	CCB	Comm. Chargeback
NSF	NSF Adjustments	SAC	State Appt Chargeback
REN	Renewals		

## INSIDER SCOOP

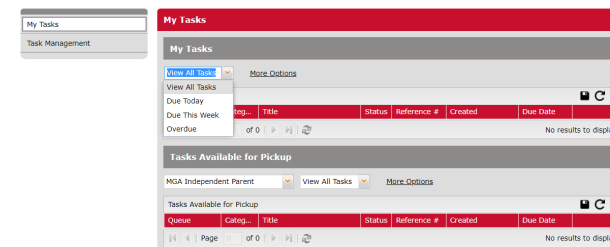
Manage Tasks to address outstanding items

Go to GAINSCOconnect > Reports and choose Tasks:

- ▶ From the toolbar, click Tasks



**URGENT TASKS** due today automatically appear here, complete immediately



**VIEW ALL TASKS** for your agency, pick up tasks, or work your personal My Tasks list