

# Underwriting data gathering

This workflow automatically gathers and validates underwriting data from multiple sources when a new policy application is submitted, reducing manual data entry and accelerating the underwriting decision process.

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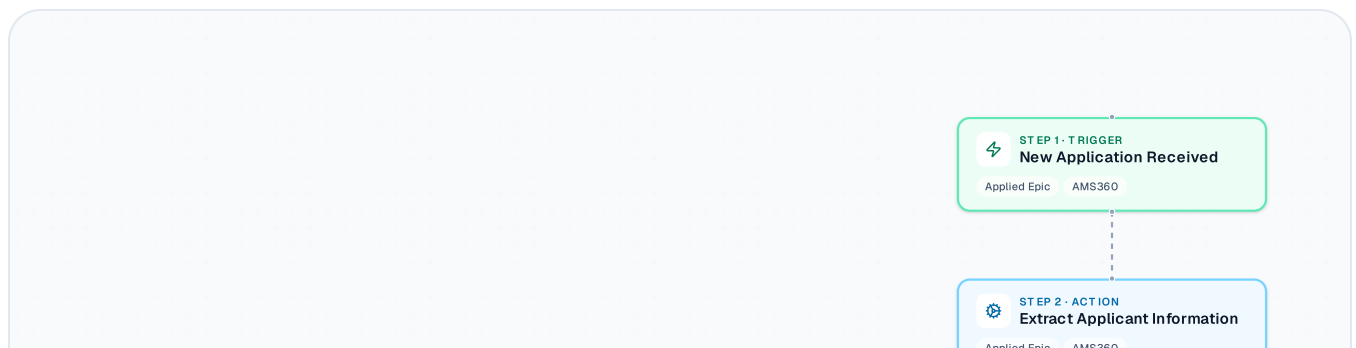


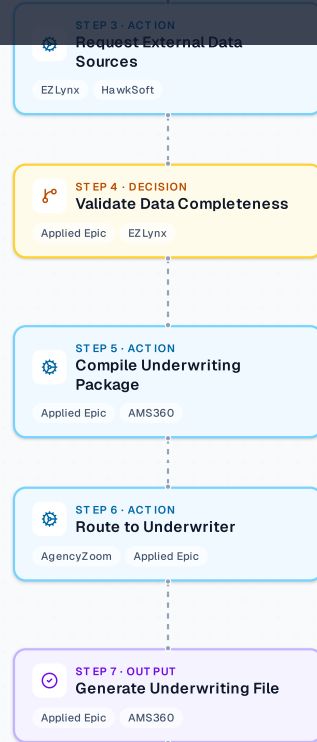
## WORKFLOW TRIGGER

New policy application is submitted through agency management system

## Visual Flow

Each node represents an automated step. Connections show how data and decisions move through the workflow.





## Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

## New Application Received

A new insurance policy application is submitted and triggers the automated underwriting data collection process. The system captures initial application details and applicant information.

Applied Epic

AMS360

2

 ACTION

## Extract Applicant Information

System automatically extracts key applicant data including name, address, coverage type, and policy details from the submitted application. Data is parsed and standardized for further processing.

Applied Epic

AMS360

3

 ACTION

## Request External Data Sources

Automated queries are sent to external databases to gather credit reports, motor vehicle records, CLUE reports, and other relevant underwriting data. Multiple data sources are accessed simultaneously to speed up collection.

EZLynx

HawkSoft

4

 DECISION

## Validate Data Completeness

System checks if all required underwriting data has been successfully retrieved and validates data quality. Missing or incomplete information triggers additional data requests or manual review flags.

5

 ACTION

### Compile Underwriting Package

All gathered data is automatically organized into a comprehensive underwriting package with standardized formatting. Risk factors and key data points are highlighted for underwriter review.

Applied Epic

AMS360

6

 ACTION

### Route to Underwriter

Complete underwriting package is automatically assigned to appropriate underwriter based on coverage type, risk level, and workload distribution. Notification is sent to assigned underwriter.

AgencyZoom

Applied Epic

7

 OUT PUT

### Generate Underwriting File

Final comprehensive underwriting file is created with all collected data, risk assessments, and documentation. File is stored in agency management system and marked ready for underwriting review.

Applied Epic

AMS360



## Outputs

- Complete underwriting data package
- Risk assessment summary
- Underwriter assignment notification



## Key Metrics

- Data gathering completion time
- Data accuracy percentage
- Underwriter review cycle time



## Tools & Integrations

- Applied Epic
- AMS360
- EZLynx
- HawkSoft
- AgencyZoom

## AI Business OS

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