



POLICYHOLDER TRACKING SERVICE PROCESSING GUIDE



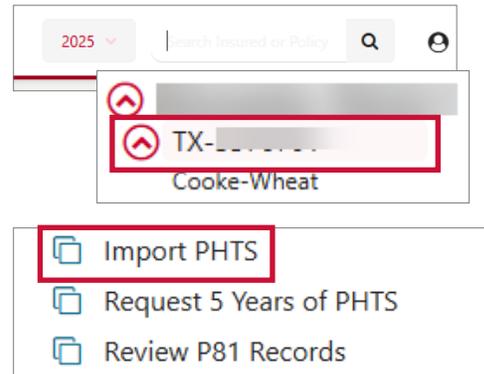
This guide will give the user step-by-step instructions on how to utilize the Policyholder Tracking Service (PHTS) tool and import data.

After the application has been keyed and transmitted to the RMA, AgriNet will automatically request one year of P81 records.

In AgriNet, select the crop year to work in and search for the policy by number or name.

Select the policy number from the left panel, then select the **Actions** button. There are three options available for PHTS.

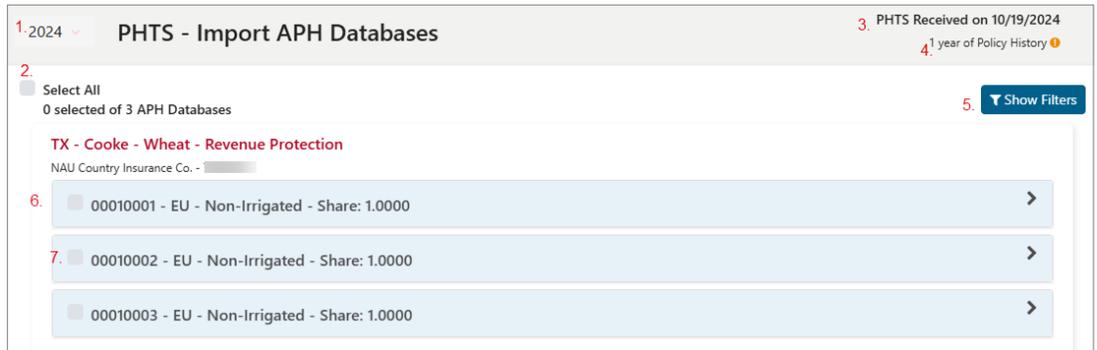
- Import PHTS – Import 1 year of PHTS data
- Request 5 Years of PHTS – Request 5 years of data
- Review P81 Records – Review the raw data



Import PHTS

After selecting the policy number, select the **Actions** tab, then select **Import PHTS**. The PHTS data screen will appear.

1. **Year** – Drop down box, defaults to most current
2. **Select All** – Select all Units for import (this will also import any available CLU records)
3. **PHTS Received** – Show date data was received
4. **History Request** – Hover cursor over yellow ! for details
5. **Show Filters** – Ability to filter APH Records by County, Crop, or Plan
6. **Unit Info** – Select on blue box to expand and see records
7. **Individual Unit box** – To import one or individual units, select the box(s) to import



Once expanded, the APH history will show what will be imported and built into the policy. All visible information will import into the unit as marked. Make sure to **Select All** on the CLU Descriptions to import the data to the Fields tab and mark the fields in AgriNet Mapping as linked to the unit if only importing certain databases.

NOTE: In some instance Land Descriptions will be available instead of CLUs. These will function the same way.

00010001 - EU - Non-Irrigated - Share: 1.0000

Year	Production	Pre-Quality Production	Production Type	Acres	Yield	Pre-Quality Yield	Yield Type
2019	5992	0	A	200.4	30	0	A
2020	1178	0	A	65.1	18	0	A
2021	13486	0	A	244.5	55	0	A
2022	8066	0	A	192.01	42	0	A
2023	4621	0	A	199.15	23	0	A

Approved Yield Prior Yield

Average Yield Prior Yield Method

T-Yield Map Area

Yield Limit

Yield Indicator

CLU Descriptions Select All

6390

6390

After the user selects **Import**, the system will build the lines of insurance on the policy and import all data. When this process is complete, a pop-up window will confirm a successful import. If there is an error with the import, AgriNet will list the unit(s) where an issue has occurred.

You have successfully built APH databases for

TX - Cooke - Wheat - Revenue Protection

- EU 0001-0001
- EU 0001-0002
- EU 0001-0003

Close the Import window, then select the **Edit** button next to the coverage to expand the line information on the policy. Select **Edit** again next to the first line to open the Acreage tab.

Cooke, TX - Wheat !
 Base Premium: \$0 Producer Premi

Edit	Line	Unit	Practice - Type FSN/PLSS - Farm Name - Map Area	Options	Yield	Plant Date	Share	Delete
	1	EU 0001 0001	Non-Irrigated - Winter 6390	→	0 ○	0.00 ○	1.0000	

NOTE: The APH tab is not complete. The yellow check mark is missing, and the yield has not updated to the acreage screen.

Select **APH** to view the imported data. If the data is correct, select **APH Complete** to finish the APH import process.

IMPORTANT: APH database questions **MUST** be answered by the user before the database is marked APH Complete.

Disclaimer: All data should be reconciled to the transfer records for the insured before the database is marked APH Complete.

NOTE: If the APH database was built as part of the PHTS import process, the date of import will appear at the top of the APH screen.

EU 0001-0001 / Non-Irrigated / Winter
Farm#: 6390

Imported from PHTS on 12/12/2024

Actions

Acreage

Description

Fields

APH

Additional Coverage

Written Agreements

Contracts

Company Only

Approved Yield Details Average Yield

34 34

T-Yield Yield Limit

None

Yield Indicator

Normal Approved Yield

Prior Yield

0

APH Number

APH Name

County ADM T-Yield

40

Prior Yield Method

Map Area

No Map Area

APH Complete

APH Verified

Cancel

Save

Database Questions Lines Miscellaneous RO Determined Yield

Year	Pre-Quality Production	Production	Type	Acres	Yield	Pre-Quality Yield	PP Acres	Aprv Yld	APH Yield	Yield Type	Yield Adj	Yield Verified	
2019	5992	0	A	200.40	0	0	0	0	0	A	<input type="checkbox"/>	<input type="checkbox"/>	
2020	1178	0	A	65.10	0	0	0	0	0	A	<input type="checkbox"/>	<input type="checkbox"/>	

To view imported CLU/Land information, select the **Fields** tab on the left. These fields have been linked to the unit in AgriNet Mapping as well.

Fields

APH

Additional Coverage

Written Agreements

Field Acres	Farm #	Tract #	Field #	Plant Acres
15.71	6390			0.00
170.81	6390			0.00
Totals 186.52			0.00	

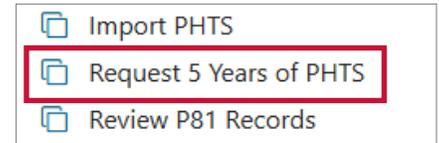
Acreage Line Acres: 0.00

3

Request 5 Years of PHTS

To request five years of PHTS data, select a policy number from the left side of the screen, then open the **Actions** menu. Select **Request 5 Years of PHTS**. A green message box will appear in the bottom right of screen.

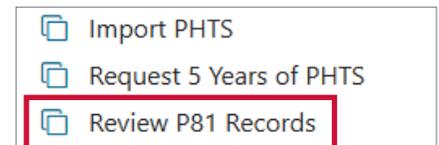
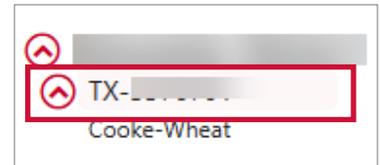
NOTE: Usually, this data will be available the next day.



Request for 5 years of PHTS is complete

Review P81 Records

To view P81 Records, select a policy number from the left side of the screen, then open the **Actions** menu. Scroll down to **Review P81 Records**. A pop-out window will open displaying the raw P81 records.



2024 PHTS - P81 Record Data		PHTS Received on 10/19/2024
		1 year of Policy History
P15 Record	PB 11 Record	P17 Record
P27 Record	P21 Record	P26 Record
Field Name	Record Value	
ID		
RECORD TYPE		
APPROVED INS PROVIDER		
POLICY STATE	48	

PHTS – Reports

The PHTS Report may be run from the **Underwriting Reports** section. This report will list the policy number, PHTS status, and the date of the last status change.

