![AgriSompo logo]

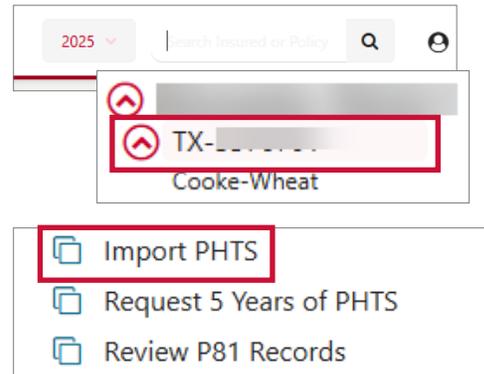# POLICYHOLDER TRACKING SERVICE
PROCESSING GUIDE

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.
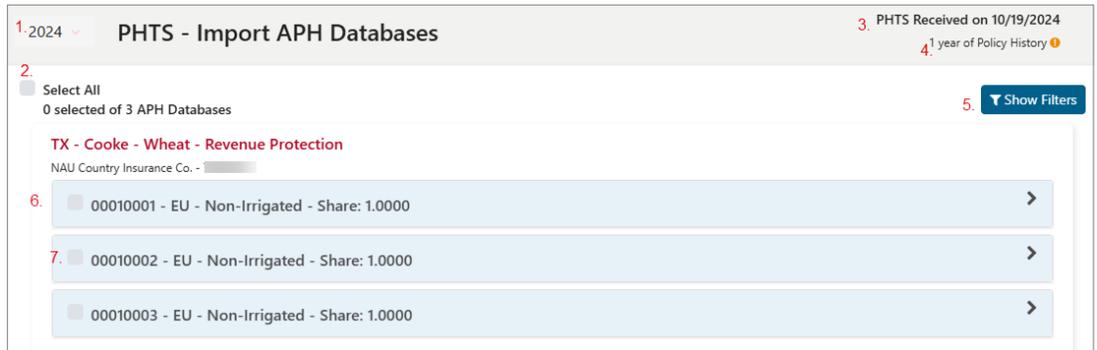
Import PHTS – Import 1 year of PHTS data

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(es) 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.

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.

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.

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.

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.
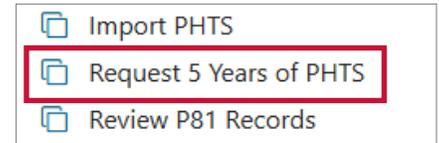
Request 5 Years of PHTS

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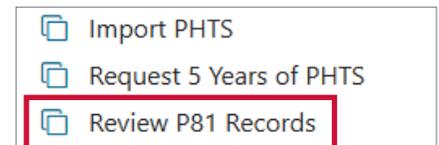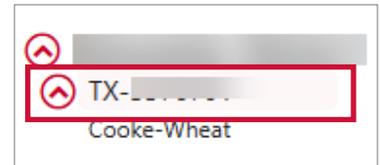
NOTE: Usually, this data will be available the next day.

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.

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.