REPORTS **QUICK GUIDE**

CANCELLATION HOLD REPORT This report shows you all of your accounts that have a cancellation hold date that is within a selected date range. You can use this report to confirm that payments have been made on these accounts to help avoid cancellation.	**CANCELLED AND REINSTATEMENT REPORT** This report will show you all of your accounts that were either cancelled or reinstated in a selected date range.
DISBURSEMENT REPORT This report will show you all disbursements that were made to you in a selected date range.	**E-PAYMENT REPORT** This report will show you all E-payments that were entered on your accounts in a selected date range.
NEW ACCOUNT REPORT This report will show you all accounts that were entered into the system that were submitted by you.	**NEW BUSINESS CONFIRMATION REPORT** This report will show you all of your accounts that were entered into the system that were submitted by you.
PENDING CANCELLATION REPORT This report shows you all of your accounts that are pending cancellation. You can use this report to try to help collect the payments from your customers and avoid cancellation.	**QUOTE REPORT** This report will show you all of your quotes that were entered in the date range selected.

The reporting system allows you to run selected reports and gives you the option to view these on screen, to save them to a file or to open them as a PDF document.

To run a report, select the report that you would like to run and click on it. The report options will display on the right side of the page for you to choose from. All reports work the same way, but the options will vary by report.

REV 05/07/2021