

Core Suite.
Multiple Markets.
One Platform.



Policy & Billing

OneShield Software | info@oneshield.com | oneshield.com | 888 663 2565



Business Solutions.
Simplified.

Embrace innovation, lower costs and reduce IT complexity through process automation of your Policy Management lifecycle.

Today's insurers must not only master traditional challenges but also compete in a real-time marketplace. OneShield Market Solutions' Policy & Billing module allows you to leverage an integrated cloud-hosted and rules-based application to automate and streamline every stage of the policy lifecycle.

Designed to work the way you do, our pre-configured workflows and rules are tailored based on your business requirements. Most importantly, our tools are compatible with existing legacy systems and interact with your ecosystem of third-party partners to meet the specific needs of insurers.

Functionality at your fingertips:

Adaptable, integrated, and secure, OneShield Market Solutions' Policy Management & Billing module reduces rising IT costs and pressures leaving you with more time to focus on business priorities like customer service, growth, and innovation.

Information when and where they need it:

- Customer Center provides a 360-degree view of existing and prospective accounts, brokers, vendors, insurers, carriers, and representatives.
- Integrated Journal and Task Management, including one-time and recurring diary entries with automated escalation, system and user-created notes, correspondence generation from templates, and embedded email integration.
- User Administration and Configuration Control Panel with standard integration to third-party applications, including financial and general ledger systems.
- User Dashboard provides a complete snapshot of appointments, daily activities, critical alerts, and open workflow steps. Users also have quick access to all open applications, submissions, and policy records and direct access to action items, contacts, reports, financials, search, and administration.

Policy Management Features:

- Real-time quoting, binding, issuing, and servicing;
- Spreadsheet rating utility paired with rules engine for specific rates, rules, and workflows across shared product definitions;
- Access to default rates and tables based on specific states or NCCI;
- Tailored underwriting rules;
- Custom billing plans;
- Financial transactions reporting or integration to General Ledger systems;
- Automated renewals and audits;
- Fully-integrated document management;
- Policy submission management;
- Web portal;
- Underwriting and carrier clearance;
- Reporting and analytics.

Billing & Accounting Features:

- Integrated Billing;
- Invoicing for broker-billed options and transactions;
- Full accounting support;
- Lockbox;
- Automated cash application;
- Automated NOC and cancellation processing.

At a Glance Benefits

Digitize, automate and simplify your operations and stakeholder touchpoints with the ability to manage and rapidly implement change.



Feature-rich, market-ready, **out-of-the-box** solution with **tailorable workflows and rules** to suit specific business & technology requirements.



With dedicated OneShield support, ensure timely responses and **speed to market** to meet any evolving needs of your business.



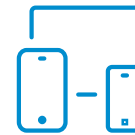
Lower Total Cost of Ownership with a hosted platform removing the expense of server hardware, supporting and maintaining networks, and database software.



All In One License Pricing includes SaaS Hub of Services: Implementation, infrastructure, maintenance and support, software licensing, on-going managed services, and automatic upgrades.



Data transparency through feature-rich reporting, robust dashboards and a wide variety of standardized reports, giving users the ability to make informed and timely decisions.



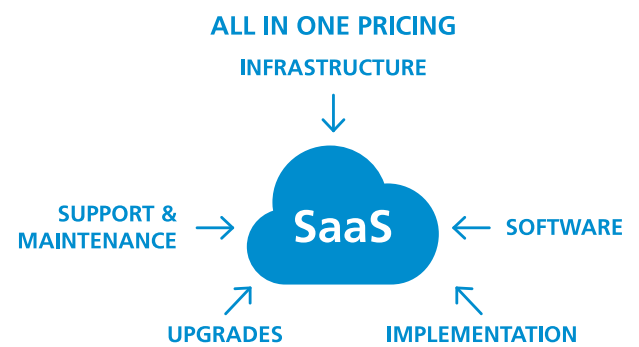
The interoperability of the technology allows for integration with APIs and third-party solutions.



Reliability, scalability and data security hosted in SSAE-16 Type II certified data center, delivering 24/7/365 availability along with the peace of mind that your data is safe and secure.



Anytime, Anywhere, Web-based User Access A secure URL and authenticated login profile offer users easy access, based on a security profile that defaults to their rights and privileges within the system.



About OneShield Software:

OneShield delivers core business software solutions to the global insurance and broader financial services industry. Our OneShield Market Solutions are specifically designed to be feature-rich, market-ready, out-of-the-box solutions serving the unique needs of specialized and niche insurers and administrators through a cost-effective and secure SaaS delivery model.

We automate and simplify the complexities of core systems with targeted solutions, seamless upgrades, collaborative implementations, and all with a lower total cost of ownership. With corporate headquarters in Marlborough, MA, and offices in India, OneShield has 50+ products in production across the global P&C insurance market.

Visit us at [OneShield.com](https://www.oneshield.com) or contact us now to learn how we can help simplify and transform your business.

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