**POLICY JACKET GENERATOR**

WFG Policy Jacket Generator provides users with a convenient online method for printing WFG policy jackets.

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| **Login** | |
| 1. | Go to <https://wfgsecure.com/ams/> |
| 2. | User ID:  Password: |

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| **Create a Jacket** | |
| 1. | From the menu bar select ***Services****,* ***Policy Jacket Generator*** and ***Create Jacket***. |
| 2. | Select ***Create Jackets*** from the Policy Jackets menu |
| 3. | Select the ***Number*** of jackets you wish to issue, choose the ***Agency*** and then click ***Create Jackets*** (Select 2 if issuing loan and owners) |
| 4. | Enter the Jacket Information (The fields in **BOLD** are REQUIRED)   * Enter***State****,* ***Jacket Type****,* ***File Number****,* ***Policy Date****,* ***Property Type****,* ***Gross Premium*** and ***Liability Amount*** (If issuing short form loan select ***Insured Clause Tab***) * If issuing Loan and Owners click ***Copy Policy*** information from previous policy to automatically fill in the completed fields * Select the ***Borrowers*** tab to enter information (the system will automatically populate city and county based off of zip code) * Select ***Endorsements*** tab to choose any endorsements to policy (the system will automatically calculate the premium for the endorsements) |
| 5. | Once all information is entered click ***Create Policy Jacket*** at bottom of screen. *Result:* The system will display the policy or policies in the Jackets in File section. |
| 6. | Select ***Generate Policy Jacket*** to Print and or Save the PDF of the policy jacket |

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| **View, Edit or Cancel Policy Jacket** | |
| 1. | Once you have created the jacket there are three actions that you may perform. ***View, Edit*** or ***Cancel*** a jacket through the ***Manage Jackets*** link at the top of the screen. |
| 2. | Select the agency and either enter policy number or select from table below. Choose ***View, Edit or Cancel***. If you cancel or edit a jacket you will be REQUIRED to enter a reason for the action. |

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| **Reports** | |
| 1. | Select the ***Reports*** from menu to access reports function of system |
| 2. | Select ***Year***, ***Date Range*** or ***WFG Remittance Report***  and select agency and choose options to pull data for and click ***Show Report*** |
| 3. | New window opens showing policy information for selected data |
| 4. | Choose an option from drop down to view report online, print it, choose to export to excel or to a PDF to save |