



FLAT CANCELS: ASPIRE

By: Underwriting Department

Primer Paso

- 1.- Entramos a la pagina web de Aspire y entramos al perfil de cliente con su numero de poliza.

The screenshot displays the Aspire web portal interface. At the top, there is a navigation bar with the Aspire logo and links for Quote Search, Policy Search, Activity Search, eSign Packets, and Reports. Below this, a header section shows the Policy Number (GPCP-00267915-00), Policy Status (Active), Policy Period (10/4/2023 - 4/4/2024), and Balance (\$357.02). There are buttons for 'Create Endorsement' and 'Make Payment'.

The main content area is divided into several sections:

- Policy Home:** A sidebar menu with links for Billing and Payments, Policy Details, Documents, Claims, Endorsement History, Activities, and Digital Wallet.
- Insured Info:** Displays the name (Juan Carlos Torres Franco), phone (323)904-1743, address (37327 28th St E, Palmdale, CA, 93550, 6460, Los Angeles), and Customer ID (975536).
- Settings:** A table of settings with an 'Edit' button.

Setting	Value
Auto-pay	Enrolled (RCCP)
Pay Plan	Low Down Credit Card-First Bill Due in 19Days
Document Delivery	Enrolled Mail Docs
eDoc Agreement	Not Accepted
Language	English
Automated Calls for Policy Servicing	Opted In
Automated Texts for Policy Servicing	Opted Out
Automated Emails for Policy Servicing	Opted In
Allow Sending Marketing Materials	Not Enr
- Declaration Summary:** A section containing:
 - Drivers:** JUAN CARLOS TORRES FRANCO, LEONOR NAVARRO FRIAS
 - Vehicles:** Honda ACCORD LX 2005
 - Policy Coverages:**

Coverages	Limit or Deductible
Bodily Injury	15/30
Property Damage	10000
Medical Payments	None
Roadside Membership	Enrolled
 - Vehicle Coverages:**

Coverages	Limit or Deductible
UMPD	Rejected
Comprehensive	
Collision	
Tow / Storage	
Rental Reimburse	
- Billing Overview:** A section for Installments.

An 'Open chat' button is located in the bottom right corner.

Segundo Paso

- 2.- Entramos a la seccion Activities que se encuentra del lado izquierdo la pagina web.

The screenshot displays the Aspire web application interface. At the top, there is a navigation bar with the Aspire logo and several search options: Quote Search, Policy Search, Activity Search, eSign Packets, and Reports. Below the navigation bar, the main content area is divided into several sections. On the left, there is a sidebar with a list of menu items: Policy Home, Billing and Payments, Policy Details, Documents, Claims, Endorsement History, **Activities** (highlighted with a red arrow), and Digital Wallet. The main content area is divided into three columns: Insured Info, Settings, and a table of Activities. The Insured Info section shows details for Juan Carlos Torres Franco, including his phone number, address, and customer ID. The Settings section shows various options for auto-pay, document delivery, and automated calls/texts. The Activities table lists various activities such as Expiration, Renewal Generation, Switch Active AR, Cancel NP, Equity Date, Reminder / Pending Cancel Notice, Recurring Credit Card Payment, Auto-Pay Notice - Credit Card, and Switch Active AR. The table has columns for Activity Type, Created, Effective, Description, User, Assigned To, and Execution Status.

Activity Type	Created	Effective	Description	User	Assigned To	Execution Status
Expiration	11/13/2023 12:49:36 AM	04/04/2024 12:01:00 AM	Activity is generated automatically	PolicyOne SystemUser		Scheduled
Renewal Generation	11/13/2023 12:49:36 AM	01/30/2024 12:01:00 AM	Activity is generated automatically	PolicyOne SystemUser		Scheduled
Switch Active AR	11/13/2023 12:49:36 AM	12/14/2023 12:01:00 AM	Activity is generated automatically	PolicyOne SystemUser		Scheduled
Cancel NP	11/13/2023 12:49:36 AM	12/08/2023 12:01:00 AM	Activity is generated automatically	PolicyOne SystemUser		Scheduled
Equity Date	11/13/2023 12:49:36 AM	12/06/2023 12:01:00 AM	Activity is generated automatically	PolicyOne SystemUser		Scheduled
Reminder / Pending Cancel Notice	11/13/2023 12:49:36 AM	11/27/2023 12:01:00 AM	Activity is generated automatically	PolicyOne SystemUser		Scheduled
Recurring Credit Card Payment	11/13/2023 12:49:36 AM	11/21/2023 12:01:00 AM	Activity is generated automatically	PolicyOne SystemUser		Scheduled
Auto-Pay Notice - Credit Card	11/13/2023 12:49:36 AM	11/13/2023 12:01:00 AM	Activity is generated automatically	PolicyOne SystemUser		Executed
Switch Active AR	10/23/2023 06:07:15 PM	11/13/2023 12:01:00 AM	Activity is generated automatically	Reggie SB Lumague		Executed

Tercer Paso

aspire Quote Search Policy Search Activity Search eSign Packets Reports

Policy Number: GPCP-00267915-00 Policy Status: Active Policy Period: 10/4/2023 – 4/4/2024 Balance: \$357.02

Create Endorsement Make Payment

Policy Home Insured Info Settings Edit

Insured Info: Name: Juan Carlos Torres Franco, Phone: (323)904-1743, Address: 37327 28th St E, Palmdale, CA, 93550, 6460, Los Angeles, Customer ID: 975536

Settings: Auto-pay: Enrolled (RCCP), Pay Plan: Low Down Credit Card-First Bill Due in 19Days, Document Delivery: Enrolled Mail Docs, eDoc Agreement: Not Accepted, Language: English, Automated Calls for Policy Servicing: Opted In, Automated Texts for Policy Servicing: Opted Out, Automated Emails for Policy Servicing: Opted In, Allow Sending Marketing Materials: Not Enr

Activities

Activity Type	Created	Effective	Description	User	Assigned To	Execution Status
Expiration	11/13/2023 12:49:36 AM	04/04/2024 12:01:00 AM	Activity is generated automatically	PolicyOne SystemUser		Scheduled
Renewal Generation	11/13/2023 12:49:36 AM	01/30/2024 12:01:00 AM	Activity is generated automatically	PolicyOne SystemUser		Scheduled
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Add Single Activity

- 3.- Hacemos click en la seccion add single activity

Como Llenar la Flat CNX form

- 1.- Cuando tengamos nuestro Cancel Request Form debemos de asegurarnos de pedir que se cancele EL MISMO DIA DE LA VENTA.
- 2.- En la seccion Reason for Cancellation escribiremos una razon valida para hacer Flat Cancel como puede ser falta de firmas o vehiculos inaceptables.
- 3.- Finalmente Subimos el documento en la opcion attachment en la misma pagina donde generamos la forma de cancelacion.
- 4: Tenemos un tiempo limite de 72 horas para procesar nuestro Flat Cancel



Aspire General Insurance Services, LLC - CA DOI
UNDERWRITTEN BY ASPIRE GENERAL INSURANCE

Policy Cancellation Request

Information:

Policy Number: GPSV-00298075-00
Insured Name: KENNEDY HUTAGAOL
Street Address: 16047 Lassen St
City, State, Zip Code: North Hills, CA 91343
Phone Number: (424) 335-8552

Coverage shall cease and the policy period shall end on the latest date issued below:

- 12:01 a.m. of the future day date specified by the named insured in the written request for cancellation;
- 12:01 a.m. of the day following the postmark date on the request for cancellation provided such date is legible and not a postage meter date; or
- If neither 1 nor 2 above apply, the date and time the request is received by us.
- If requesting a backdated cancellation effective date proof is required, such as, proof of new coverage showing same or greater coverage, proof of sale, total loss, etc.
 - Requested Cancellation Date: _____

Reason for Cancellation: _____

Signature: _____ Date: _____

On cancellation, you may be entitled to a premium refund or have an outstanding balance due. If this policy is cancelled, any refund due will be computed on a daily pro-rata basis minus a cancellation fee. All policy fees are fully paid as soon as coverage goes into effect.

PASO FINAL

4.-

Seleccionamos la opción Cancel Request y editamos el archivo que nos generó la página web.

Create Activity

Activity **Cancel Request**

Description

Note

Effective Date 10/2/2023 12:11 PM  

Documents

Cancel Request Form (02/21) — English

Attachments

 **Attach files**

Create



ASPIRE NO PROCESA VOIDS,
SOLO FLAT CANCELS.



SEGUIMIENTO:

- En la seccion de Billing and payments podremos verificar si los fondos ya fueron devueltos si en la seccion inferior de la pagina aparece una nueva seccion llamada Reversed/Transferred payments.
- Debemos comprobar que los fondos devueltos coincidan con los fondos usados para abrir la poliza.

The screenshot shows the Aspire insurance portal interface. At the top, the policy number is GPSV-00325700-00 and the status is 'Cancelled (Cancel - Flat)'. The policy period is 8/2/2023 - 2/2/2024, and the cancellation date is 8/2/2023. The balance is \$0.00. A blue arrow points to the 'Billing and Payments' section in the left sidebar.

Item	Original Date	Type	Amount	Status	Action	Action by	
Premium (Unpaid)			\$101.00	\$101.00	\$0.00	\$0.00	Andrew Guillen
Fees			\$0.00	\$0.00	\$0.00	\$0.00	
Roadside Membership Fee	08/02/2023	09/01/2023	\$6.00	\$6.00	\$0.00	\$0.00	
Installment Fee	08/02/2023	09/01/2023	\$10.00	\$10.00	\$0.00	\$0.00	
Fraud Fee	08/02/2023	09/01/2023	(\$1.76)	(\$1.76)	\$0.00	\$0.00	Flat Cancel
Installment Fee	08/02/2023	09/01/2023	(\$20.00)	(\$20.00)	\$0.00	\$0.00	Flat Cancel
Policy Fee	08/02/2023	09/01/2023	(\$28.00)	(\$28.00)	\$0.00	\$0.00	Flat Cancel
Roadside Membership Fee	08/02/2023	09/01/2023	(\$12.00)	(\$12.00)	\$0.00	\$0.00	Flat Cancel
Unpaid Amounts	08/03/2023	08/02/2023	\$45.76	\$45.76	\$0.00	\$0.00	From #0
Fraud Fee (Unpaid)			\$0.88	\$0.88	\$0.00	\$0.00	Andrew Guillen
Fraud Fee (Unpaid)			\$0.88	\$0.88	\$0.00	\$0.00	Andrew Guillen
Installment Fee (Unpaid)			\$10.00	\$10.00	\$0.00	\$0.00	Andrew Guillen
Policy Fee (Unpaid)			\$28.00	\$28.00	\$0.00	\$0.00	Andrew Guillen
Roadside Membership Fee (Unpaid)			\$6.00	\$6.00	\$0.00	\$0.00	Andrew Guillen

** These amounts were added after the bill was generated

Reversed	Original Payment Date	Type	Amount	Status	Action	Action by
08/03/2023	08/02/2023	ProducerSweep	\$146.76	Voided	Voided: Cancel Flat	Andrew Guillen