

Enhancements to Life Index and Inquiry Screens

Patriot Insurance Company is pleased to share that we have made enhancements to the Life Index and Inquiry screens to help streamline searching for Life quotes and policies. These are now combined on one page to make it easier to access these transactions.

From iBIS Agency Services, under the Life tab, select Life Inquiry/Index. Once you enter the criteria and click Search, results will be returned under the Policy Inquiry Results and Quote/Submission Results.

This screen provides the same functionality as the former Life Index and Inquiry screens, with some added improvements. For example, a new icon can be found in the quote results to easily access the documents. Additionally, clicking the Progress bar will provide the Activity History for a quote.

We hope this enhancement will save you time when searching for Life policies and quotes on our website.

If you have any questions, please contact Automation Support at 800-234-1133, extension 3000.