



RENEWAL TRANSITION NOTIFICATIONS AND REPORTS



JUNE 26, 2025



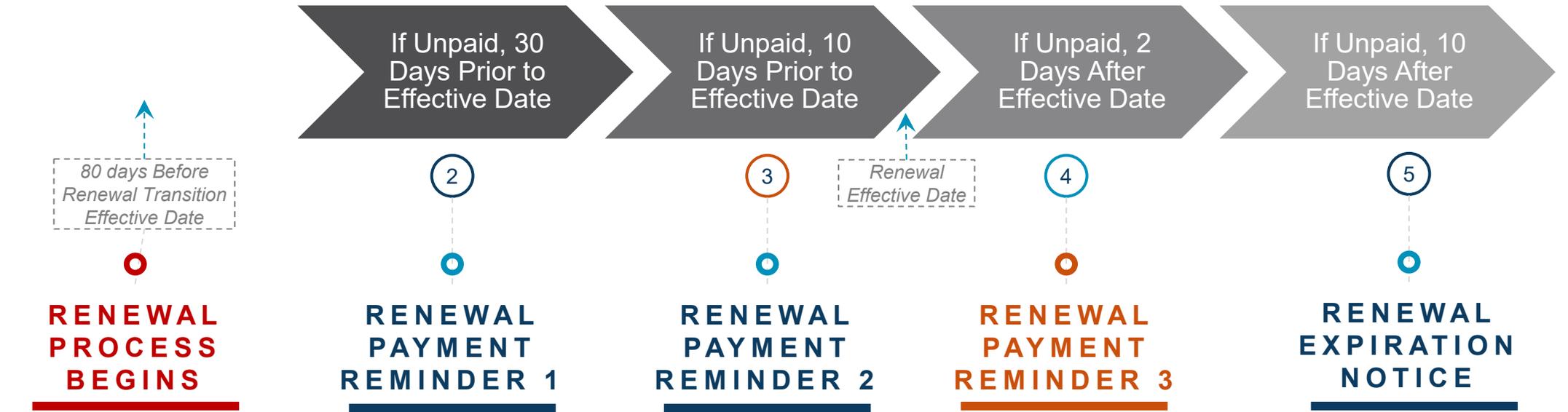
Enclosed, please find samples of agent email notifications regarding Main Street Commercial+ policy activity. The enclosed are only those email notifications that are applicable for Renewal Transition policies.

A timeline overview is included to help you understand when each of these messages may be received to your agency's centralized email inbox.

RENEWAL TRANSITION

POLICY NOTIFICATIONS TRIGGER TIMELINE

WHEN WILL MY AGENCY RECEIVE AN EMAIL?



Note: See your daily Transaction Activity Report and filter by Renewal, or view your Renewal Transition Report, which is updated twice-monthly. NY agents are also mailed a renewal packet.

Open Issue: This email notification is noted in our Open Issues Log. It is working for most recipients; however, it is currently being incorrectly received for policies on installment plans and with \$0 owed. Please disregard the “jeopardy of a lapse in coverage” language.

Agent Workaround: See your daily Transaction Activity Report and filter by Payment.

This notice indicates that the renewal has not been paid and coverage has expired.

Note: The policy may be reinstated without underwriting review for up to 40 days following the effective date by calling Customer Care and reinstated with underwriting review thereafter.



SAMPLE EMAIL NOTIFICATIONS FOR RENEWAL TRANSITION

SAMPLE: RENEWAL PAYMENT REMINDER 1



Renewal Payment Reminder - Policyholder Action Needed!

A Renewal Payment Reminder was issued for DUNDER MIFFLIN for the policy referenced above.

The amount due of \$777.00 is required to be made by January 1, 2019 to renew this policy.

This policy is transitioning to our new Main Street Commercial+ product. No billing methods or payment plans will transfer over to the new policy. Policyholders who were enrolled in an automatic payment plan, such as Auto Pay or EFT, will need to set those up again.

[Log in](#)

If you have further questions, we are happy to assist. Please give us a call at [866-426-6190](tel:866-426-6190).

**Thank you for Choosing
Main Street America Insurance**

Email sent by Homesite Group, Inc. on behalf of its affiliate, Main Street America Group, Inc.

Insurance is underwritten by eight member companies and one affiliate of Main Street America Insurance: NGM Insurance Company, Old Dominion Insurance Company, Main Street America Assurance Company, MSA Insurance Company, Grain Dealers Mutual Insurance Company, Main Street America Protection Insurance Company, Spring Valley Mutual Insurance Company, Austin Mutual Insurance Company and Midvale Indemnity Company (affiliate). Products not available in all states.

This email was sent by Homesite Insurance, One Federal Street, Boston, MA, 02110, United States

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SAMPLE: RENEWAL PAYMENT REMINDER 2



Renewal Payment Reminder

A Renewal Payment Reminder was issued for DUNDER MIFFLIN for the policy referenced above. Your policyholder has a payment due for their Renewal policy. The minimum amount due of \$777.00 is required to be made by January 1, 2019 to renew the policy.

[Log in](#)

Did you know your customers can enroll themselves in AutoPay online? Encourage your customers enroll in AutoPay to avoid missing a payment and having a lapse in coverage.

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This email was sent by Homesite Insurance, One Federal Street, Boston, MA, 02110, United States

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SAMPLE: RENEWAL PAYMENT REMINDER 3



Renewal Payment Reminder

A Renewal Payment Reminder was issued for DUNDER MIFFLIN for the policy referenced above. Your policyholder has a past due payment for their Renewal policy and is in jeopardy of a lapse in coverage.

The minimum amount due \$777.00 was required to be made by January 1, 2019.

[Log in](#)

Did you know your customers can enroll themselves in AutoPay online? Encourage your customers to enroll in AutoPay to avoid missing a payment and having a lapse in coverage.

If you have further questions, we are happy to assist. Please give us a call at [866-426-6190](tel:866-426-6190).

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SAMPLE: RENEWAL EXPIRATION NOTICE



Renewal Expiration Notice

A Renewal Policy Offer Expiration Notice was issued for DUNDER MIFFLIN for the policy referenced above. Coverage expired on January 1, 2019 as the renewal payment was not received.

To view this notice please log into Agents Only and perform a Commercial Lines Policy View/Change. The Notice is available under Documents on the Policy Details page.

[Log in](#)

If you have further questions, we are happy to assist. Please give us a call at [866-426-6190](tel:866-426-6190).

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AGENT REPORT VIEW OPTIONS

REVIEW RENEWALS IN-PROGRESS

Option 1 – Transactional Activity Report

Updated Daily

Navigate to:

AGENTS ONLY >

REPORTS >

TRANSACTION ACTIVITY REPORT

The screenshot shows the 'Transaction Activity Report' form in the 'Agents Only' portal. The interface includes a top navigation bar with the 'Main Street America' logo and 'Agents Only' text. A left sidebar contains navigation icons for Home, Dashboard, Clients, Quotes, Billing, Claims, Reports (highlighted), and Resources. The main content area features a dark blue header with a back arrow and the word 'Reports'. Below this is the 'Transaction Activity Report' title and a light blue informational banner stating: 'Due to system batch processing, transaction dates on the report may appear to be later than dates entered into the system.' The form contains several input fields: 'Period' (dropdown menu set to 'Previous Day'), 'Policy Number', 'Agency Name', 'Account Number', and 'Name Insured'. There are also two dropdown menus for 'Line of Business' (set to 'ALL') and 'Transaction Type' (set to 'ALL'). A note below these fields reads: '* Please select at least one Transaction Subtype'. This is followed by a selection interface with two columns: 'Available Transaction Subtypes' and 'Selected Transaction Subtypes'. The available subtypes are: Audit, Bill Adjustment, Cancel Notice, Cancellation, Cash Adjustment, and Claim Payment. Each has an unchecked checkbox. Between the columns are four arrow buttons: a double right arrow (>>), a single right arrow (>), a single left arrow (<), and a double left arrow (<<). At the bottom of the form is a dark blue 'CREATE' button.

REVIEW RENEWALS IN-PROGRESS

Option 2 – Transactional Activity Report

Updated Twice-Monthly, Beginning in July

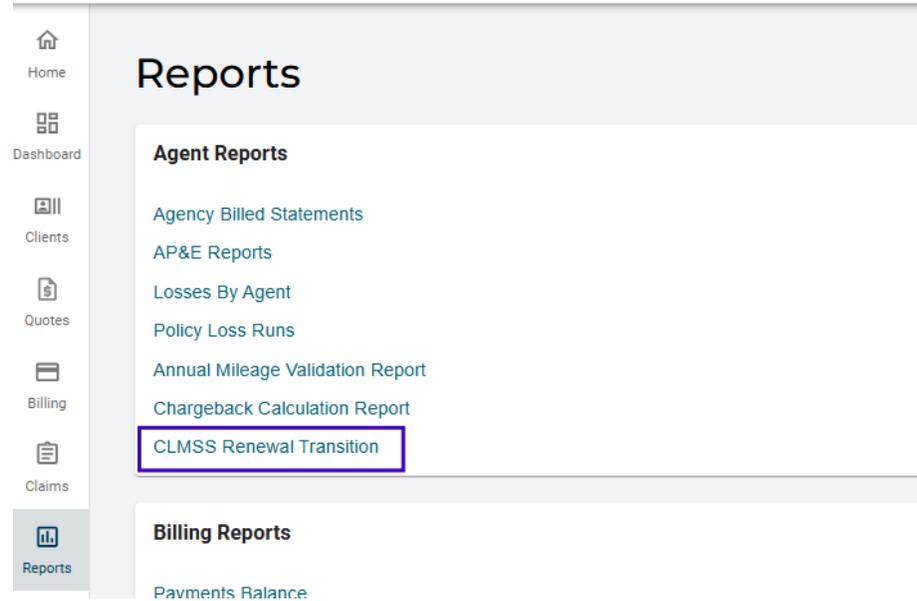
Navigate to:

AGENTS ONLY >

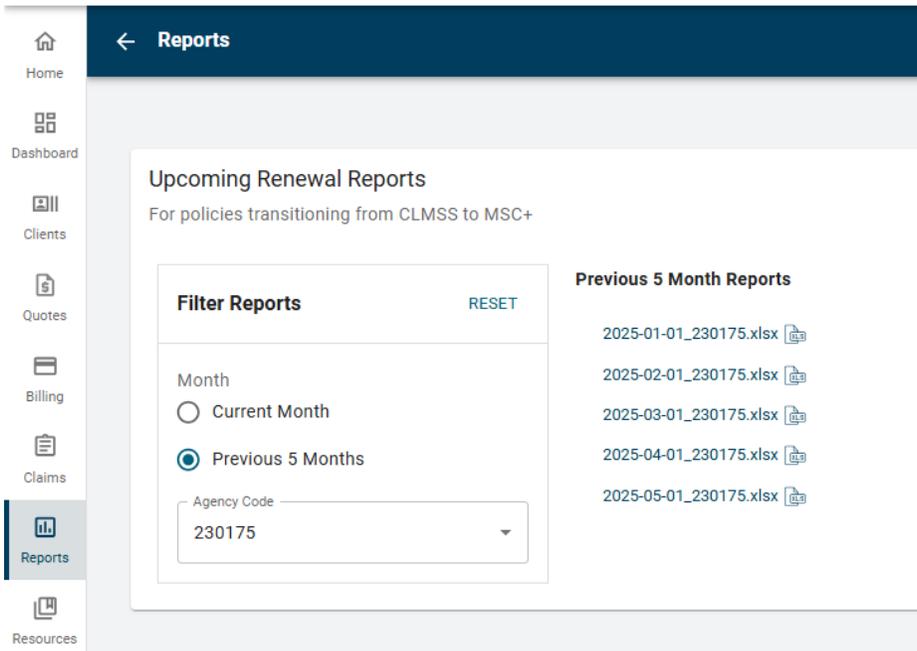
REPORTS >

CLMSS RENEWAL TRANSITION >

UPCOMING RENEWAL REPORTS



The screenshot shows the 'Reports' page in the Agents Only interface. On the left is a navigation sidebar with icons for Home, Dashboard, Clients, Quotes, Billing, Claims, and Reports (which is highlighted). The main content area is titled 'Reports' and is divided into two sections: 'Agent Reports' and 'Billing Reports'. Under 'Agent Reports', there are links for Agency Billed Statements, AP&E Reports, Losses By Agent, Policy Loss Runs, Annual Mileage Validation Report, Chargeback Calculation Report, and CLMSS Renewal Transition (which is highlighted with a purple box). Under 'Billing Reports', there is a link for Payments Balance.



The screenshot shows the 'Upcoming Renewal Reports' page in the Agents Only interface. The page has a dark blue header with a back arrow and the title 'Reports'. The main content area is titled 'Upcoming Renewal Reports' and includes the subtitle 'For policies transitioning from CLMSS to MSC+'. There are two main sections: 'Filter Reports' and 'Previous 5 Month Reports'. The 'Filter Reports' section has a 'RESET' button and two radio buttons: 'Current Month' (unselected) and 'Previous 5 Months' (selected). Below the radio buttons is a dropdown menu for 'Agency Code' with '230175' selected. The 'Previous 5 Month Reports' section lists five reports with download icons: 2025-01-01_230175.xlsx, 2025-02-01_230175.xlsx, 2025-03-01_230175.xlsx, 2025-04-01_230175.xlsx, and 2025-05-01_230175.xlsx. On the left is a navigation sidebar with icons for Home, Dashboard, Clients, Quotes, Billing, Claims, Reports (highlighted), and Resources.

REVIEW RENEWAL TRANSITION PAYMENTS REPORTS

Payments Made Report

Navigate to:

AGENTS ONLY >
REPORTS >
PAYMENTS MADE



Agents Only



Home



Dashboard



Clients



Quotes



Billing



Claims



Reports



Resources

← Reports

Payments Made

Billing Payment Service Report

Date Range Today	Amount Type Individual	Transaction Type All	Agent Code 230175
	Amount From	EFT Type All	Entered By All
	Amount To		

CHANGE REPORT

EXPORT

Date	User	Name	Account #	Amount
06/25/2025	CR Card	Gary J Davis DbA Davis	CACP03062	\$249.00
06/25/2025	CR Card	Alicia R Myers	ACCJ9235K	\$276.95
06/25/2025	CR Card	Pavel Y Zybailla DbA Brigada	CACP0078V	\$29.00
06/25/2025	CR Card	Susan J Wilcox	ACCJ6120D	\$290.22
06/25/2025	CR Card	Kerry A Corr	21M5583D	\$188.54