



## How to Send a Follow-Up in the Diary Notes of a Policy

MAX Agents can send a follow-up note to yourself or another agent in your agency within MAX's policy processing system (versus using your own agency management system). You can set your own follow ups in the Diary tab. The system will notify you via email of an action to complete on a future date.

1. Click the "Diary" tab within a policy. Add a new diary note by clicking "Add New Notes".

The screenshot displays the MAX policy management interface for a Homeowner Policy (HO4). The top navigation bar includes tabs for Insured Info, Coverages, Billing/Docs, History, **Diary** (highlighted with a red circle), Imaging, Actions, Inspection, Claims Summary, and Renewal. Below the navigation bar, there are fields for Term, Name, Agency Name, Member ID, Member Since, Agent, Status (New Business), MAXIA Auto (NO), and Agency Phone. A "Policy Inquiry" section is visible, containing two "Add New Notes" buttons (one highlighted with a red circle) and "Print Notes" buttons. The text "No Records Found..." is displayed below the buttons.

Enter the note by choosing from the Subject dropdown and entering the message of the note. Click the Follow Up check box field. Enter the date you would like to follow up on this note.

You may also assign the follow up to another person in your agency by selecting them in the Assigned User drop down. If the Assigned User drop down is not selected, the follow up will return to you by default.

**Add New Notes**

**Notes Data**

Critical **Choose subject, click "Follow Up?" field and enter date.**

Entered by: \_\_\_\_\_ on 12/7/2018 8:47:32 AM

Subject: Contacted insured

Assigned User: Select User

Follow Up?  12/07/2018 Follow Up Complete

Call the insured to follow up on repairs to the roof.

Type notes.

You may assign the follow up to another person in your agency. If the Assigned User drop down is not selected, the follow up will return to you by default.

Cancel Add

On the date you selected for the follow up, MAX will generate an email to you reminding you to follow up on this policy. At that time if you need to continue the follow up, there will be a second text box to add any subsequent notes. Each note will be added to the main note with a date and time stamp.

## Add New Notes


**Notes Data**

Critical Entered by: [redacted] on 12/7/2018 8:47:32 AM

Subject:  Assigned User:

Follow Up?   Follow Up Complete

Call the insured to follow up on repairs to the roof. Notes

Type subsequent notes here. 

You can also update the follow update at that time

## Add New Notes

**Notes Data**

Critical

Subject: Contacted insured

Follow Up?  12/16/2018 Follow Up Complete

Entered by:  on 12/7/2018 8:47:32 AM

Assigned User: Select User

**Add additional follow-up date**

**Add additional follow-up text**

Notes

Call the insured to follow up on repairs to the roof.  
 Dec 8 12:04 PM <agent name> Called insured but no answer, will call back next week.

Cancel
Add

In the Policy Inquiry table, you can see the status of the follow up.

**Policy Inquiry**

Add New Notes
Print Notes

Assigned To	Subject	Comment	Follow Up Date	Status	Delete
	Contacted insured	Call the insured to follow up on repairs to the roof. Dec 8 12:04...	12/16/2018	Pending	🗑️

Add New Notes
Print Notes

Once the follow up is complete you can simply mark the completed check box.

## Add New Notes

**Notes Data**

Critical Entered by: \_\_\_\_\_ on 12/7/2018 8:47:32 AM

Subject: Contacted insured Assigned User: Select User

Follow Up?  Follow Up Date: 12/16/2018  Follow Up Complete

Call the insured to follow up on repairs to the roof.  
Dec 8 12:04 PM <agent name> Called insured but no answer, will call back next week.

Buttons: Cancel, Add

### Need Help?

Call our MAX Agent Appreciation Line at 844-629-2468 or open a live chat session at [mymaxinsurance.com](http://mymaxinsurance.com).