

# How to find Requirements Outstanding, Underwriting complete

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Step 1

Go to the new OneSource Online using the blue banner at the top of the page

Step 2

Go to Pending Policies to locate your policy lists

Step 3

Navigate to the All Policies Tab

Step 4

Next to the policy number, you will see a colored icon that tells you how many requirements are needed to complete the case. Sort by Status to find cases in Requirements Outstanding, Underwriting complete

The screenshot shows the OneSource Online interface. At the top, there is a navigation bar with links for Home, Update Account Info, and Logout, along with a search box. Below this is a 'Quicklinks' section with a blue banner that says 'Check out the new OneSource Online'. A red arrow points to this banner. Below the banner is a 'My Business' section with a 'Pending Policies' link. A red arrow points to this link. Below the 'My Business' section is a table of pending policies. A red arrow points to the 'Status' column header, and another red arrow points to a policy row. The table has columns for Name, Policy Number, Product Name, App Received, Status, and Status Date. The 'Status' column contains yellow boxes with the text 'Requirements Outstanding, Underwriting Complete'. The 'Policy Number' column contains colored icons (blue, green, red) next to the numbers. The 'Product Name' column contains 'American Protector Plus', 'Asset Care I/III', and 'Legacy'. The 'App Received' column contains dates like '06/19/2017', '06/27/2017', and '07/05/2017'. The 'Status Date' column contains dates like '08/07/2017', '09/13/2017', and '08/14/2017'.

Name	Policy Number	Product Name	App Received	Status	Status Date
J...	50	American Protector Plus	06/19/2017	Requirements Outstanding, Underwriting Complete	08/07/2017
R...	30	American Protector Plus	06/27/2017	Requirements Outstanding, Underwriting Complete	09/13/2017
M...	10	Asset Care I/III	07/05/2017	Requirements Outstanding, Underwriting Complete	08/14/2017
M...	50	Legacy	06/27/2017	Requirements Outstanding, Underwriting Complete	08/20/2017
C...	50	Legacy	08/17/2017	Requirements Outstanding, Underwriting Complete	09/14/2017
R...	20	Legacy	05/23/2017	Requirements Outstanding, Underwriting Complete	08/28/2017

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Step  
5

Click on the policy number to go to policy detail. Use the “Requirements Outstanding” jump link to locate the Requirements section

Step  
6

Review the needed requirements. Use the “Submit Requirements” button to attach a file or to add a comment about a pending requirement. Do not use the Requirement Comment box to communicate with the Case Manager as they do not review this information.

Step  
7

Return to your policy list to review your next case.

Policy Detail » Pending — Application Received ⓘ

Last Refresh Date: 09/15/2017, 04:00 PM EDT

Insured: [redacted] Policy #: [redacted]

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### Requirements

[Submit Requirements](#)

~ Needed to Underwrite / Issue / Mail Policy (1)

Insured	Requirement	Status	Date Created	Comments
[redacted]	Bank Draft Authorization Form	Pending	09/14/2017	