
P1
LIFE

HMR
GROUP

Developers of P1 Life

Cloud delivered.
Precision coded with more than
100 years of insurance expertise.

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P1 Life Insurance Management Application

Fast, Simple and Streamlined

P1 is trusted and used by major insurers for managing reinsurance and run-off. Enjoy global access to your books of business and critical financial data anywhere in the world. P1 utilizes the Microsoft Azure Platform for delivering the application in the cloud. P1 securely handles millions of dollars in transactions, claims and contracts. Enterprise-ready from day one, you can relax knowing the power of P1 is supporting your business like no other.

Masterfully Delivered.

Every line of code and query is supported by more than 100 years of insurance management expertise. The team is respected and trusted for their critical knowledge and mastery of insurance and assumed/ceded reinsurance. P1 is more than just an application: HMR is renowned for outstanding business and technical support which readies users for complete success.   User friendly and efficient, the system handles multiple books of business with ease and accuracy.

Features

- **Search Results Screen**
  Policy | Policy Status | First Last Name | Second Last Name | Relation Description | Client No

- **Policy Info**
  Owner | Policy No.| Suffix | No of Coverages | Current Policy Status | Issue State
  Product Name | Gross Annual Premium | Modal Premium | Issue Eff Date | Policy Paid to Date | Cancel Date | Term Exp Date | Bill Mode | Draw Day | Bill Type

  Menu:

- **Policy Basic Screen**
  Country of Issue | Issue Location | Sub-Company | Application Signed Date | Application Received Date | Policy Issued Date Estimate3d Mode Premium | Application Form ID | Currency Used for Balances | Client's Current Location | Purpose of Insurance | On System Date | Issue Date Type | Tran Code | Application Signatures Reviewed and Signed | Variance Indicator | Loan Amount | Policy Options | Date of Next Enhancement Option | Freeze future AIO increases

- **Policy Billing Screen**
  Billing Type | Billing Draw Day | Policy Mode Factor | Policy Fee Factor | Policy Billed to Date | Billing Reminder Notice Type | Date of Most Recent Returned Payment | Date of Previous Returned Payment | Date Cred CD/PAC will Redraw Premium | Billing Mode Type | Billing Lead Time | Restrict Billing Mode Factor | Restrict Billing of Policy Fee | No of Days to Extend Lapse |

- **Policy Restrict Billing**
  Restrict Billing Effective Date | Restrict NFO or Billing Activity Reason | Restrict Billing code #1 | User ID that Initiated Restrict Bill| Restrict Billing Ending Date | Department that Initiated Restrict Billing | No. of Days to Extend Lapse | Change Date

- **Quote Reinstate**
- **Reinstate**
- **Change Restrict Dates**

- **Comments**
  Warning | Comment | Change Date | Note Date | Username | Change User | Pol Current Status | Date Closed | Diary Date | Follow-up Date | Last and First | Create Date

- **Relationships**
  Relationship Name | First | Last | DOB | Rate Age | Client is a | Company Name | Type Code | Relationship Type | Client No | Change Date | Bank Seq # | Insured | Assign Date | Addr Type Cd

- **Manage Cash Menu**
  Cash Receipt Options
  | Add Cash Receipt Record | Modify Cash Receipt Record | View Cash Receipt | Apply Cash Receipt | Undo Applied Cash | Reverse Premium

  Cash Disbursement Options

Add Cash Disbursement Record | Modify Cash Disbursement Record | View Cash Distribution Records | Apply Cash Distribution Record | Undo Cash Distribution Record

Other Premium Options
Reverse a Reversal | Manual Checks | Void Checks | View Voided Checks | View ARAP Balances | Update Reference No | View Cash Details

- **Diary Activity**
- **Docu-Read: P1 Document Management**
- **Bank Information**
  Routing Number | Bank Account No | Account Holder Name | Checking | Savings | Client is Payer | Bank Account Sequence No | Max Bank Account Sequence No | Change By | Change Date
- **Underwriting Note**
- **Beneficiaries**
  Beneficiary Name | Client No | Address Type | Beneficiary Type | Designate Code | Relationship to Insured | Proceeds % | Minor Indicator | Sex | Modify | Add | Primary Proceeds % Entry | Contingent Proceeds % Entry | Beneficiary Primary | Percentages Contingent
- **Accounting History**
  Account to Credit/Debt | Accounting Entry Description | Branch/Departments | Amount | Process Date | System Date | Description Text| Tran Status
- **Accounting Balances**
  Status | Amount Due | Applied | Remaining | Original Create Date | Reference Number | Refund Date
- **Cash Details**
  Balance ID | Bal Seq No | Transaction Amount | Transaction Type | EFT (Y/N) | Create Date | EFT Date | Reversal Date | Reversed User | Paid to Date | Payment Type | Payment Date | Check Header ID

- **Change Draw Day**
- **App Track**
- **Reports**
  Daily | Monthly | Invalid Route Report | AdHoc | P1 Premium Report | P1 Pending Refunds | View YRT Batch Cycle Results | P1 YRT Offer Letter Report | P1 Cognos Cash Report | P1 Cognos Non-Cash Report | Draw Day Zero Report

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