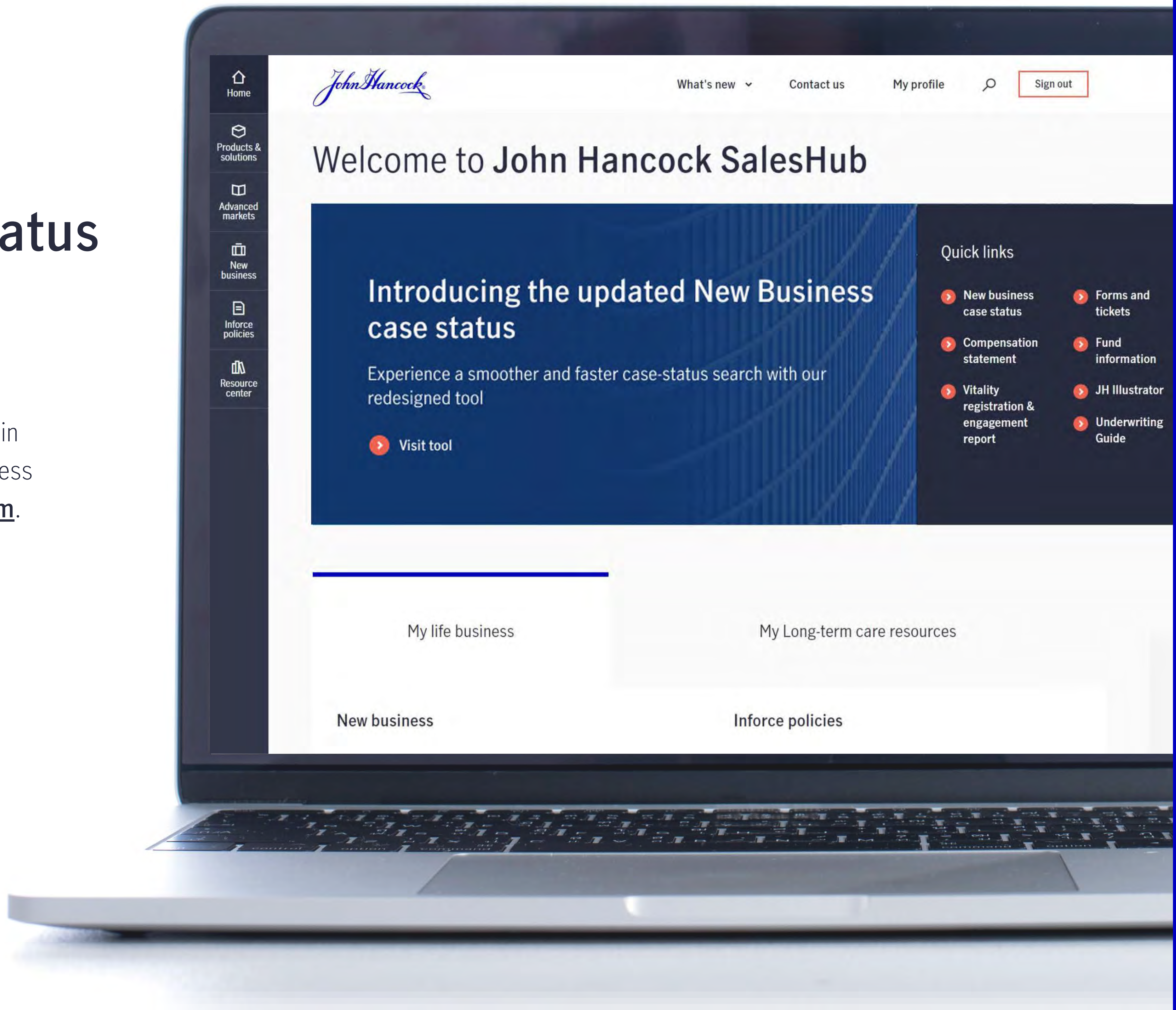
How to view pending case status on JHSalesHub

Reference guide

Stay abreast of your cases' progress in realtime by accessing the New Business case status tool on JHSalesHub.com.

Use this guide to find out how.



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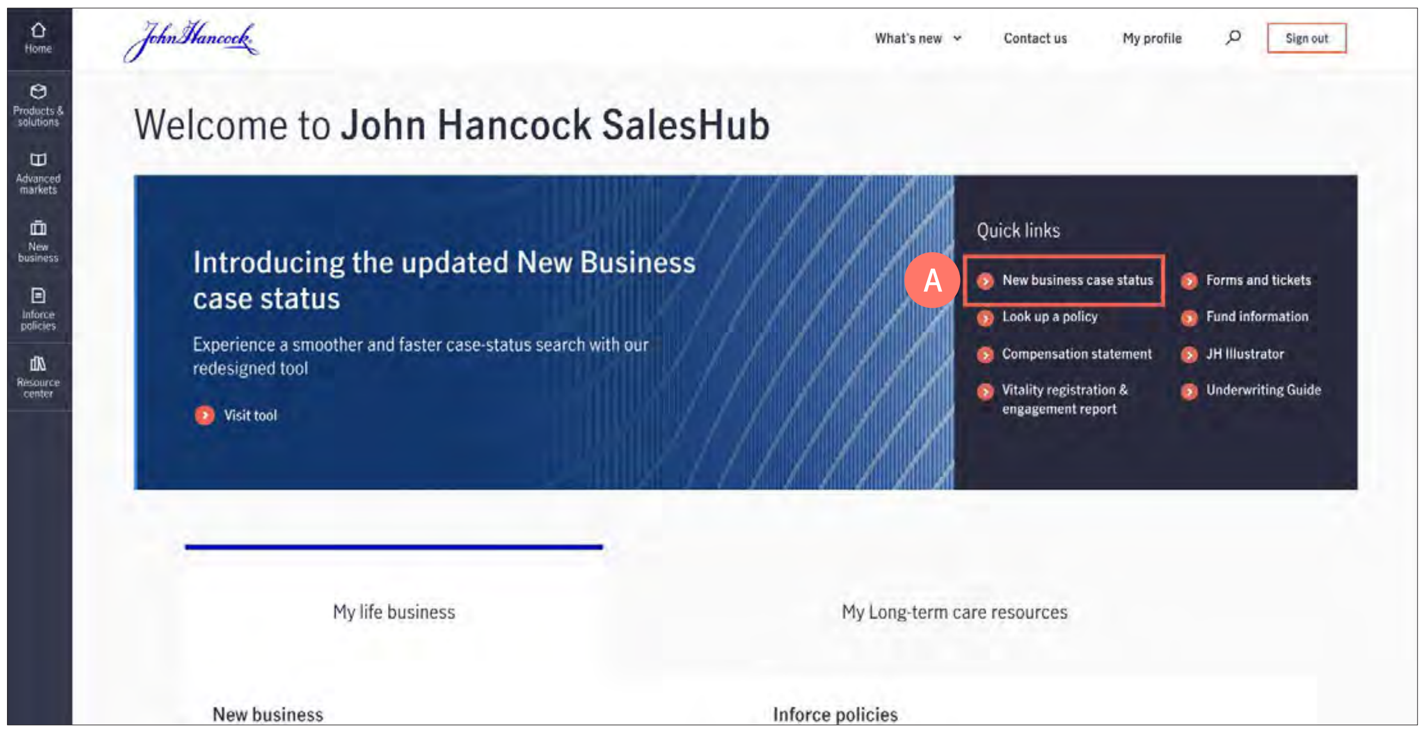
Step 1: Getting started

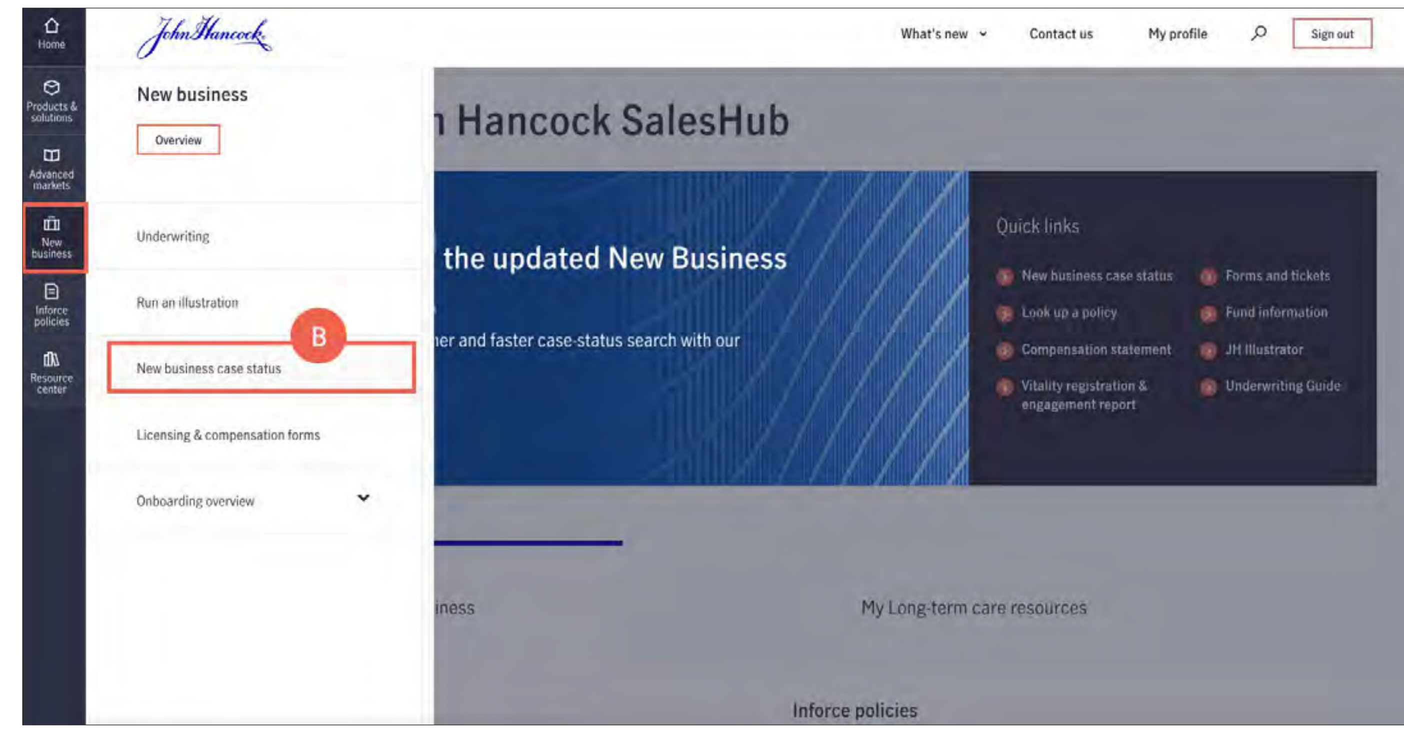
Log in to JHSalesHub.com* and click on the New Business case status link. You can access this tool from two locations once you log in:

Under the **Quick links** section on the home page. A



OR

From the **New Business** page in vertical navigation. B



*__Note:__ You must be registered and logged into JHSalesHub to use this service.

Step 2: Search

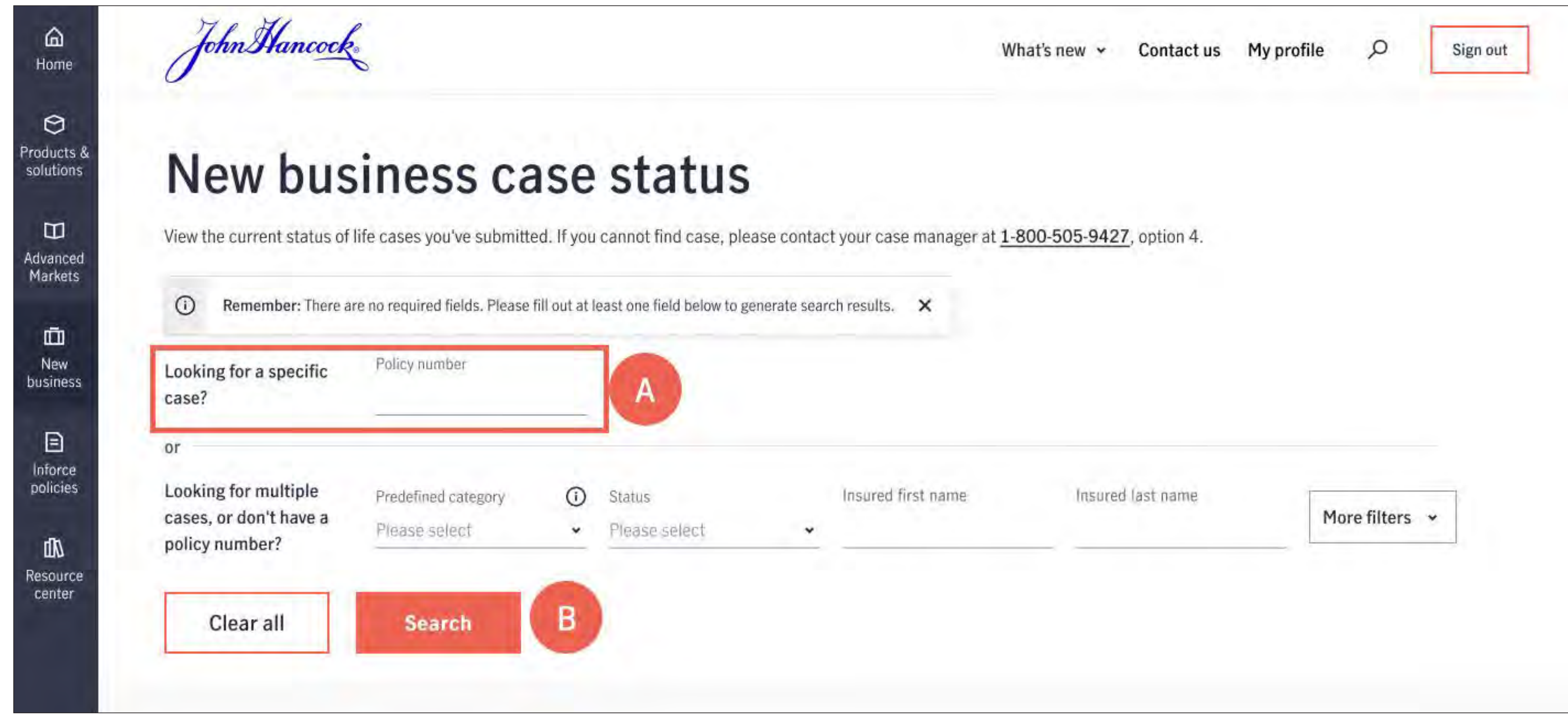
To start a search, you can either use the individual case search option or elect to search for multiple cases.

Option 1 — individual case search

- The **individual case search** method allows you to look up a specific case using a policy number.
  - To use this method, enter the policy number. A
  - Click the **Search** button. B

Helpful hint

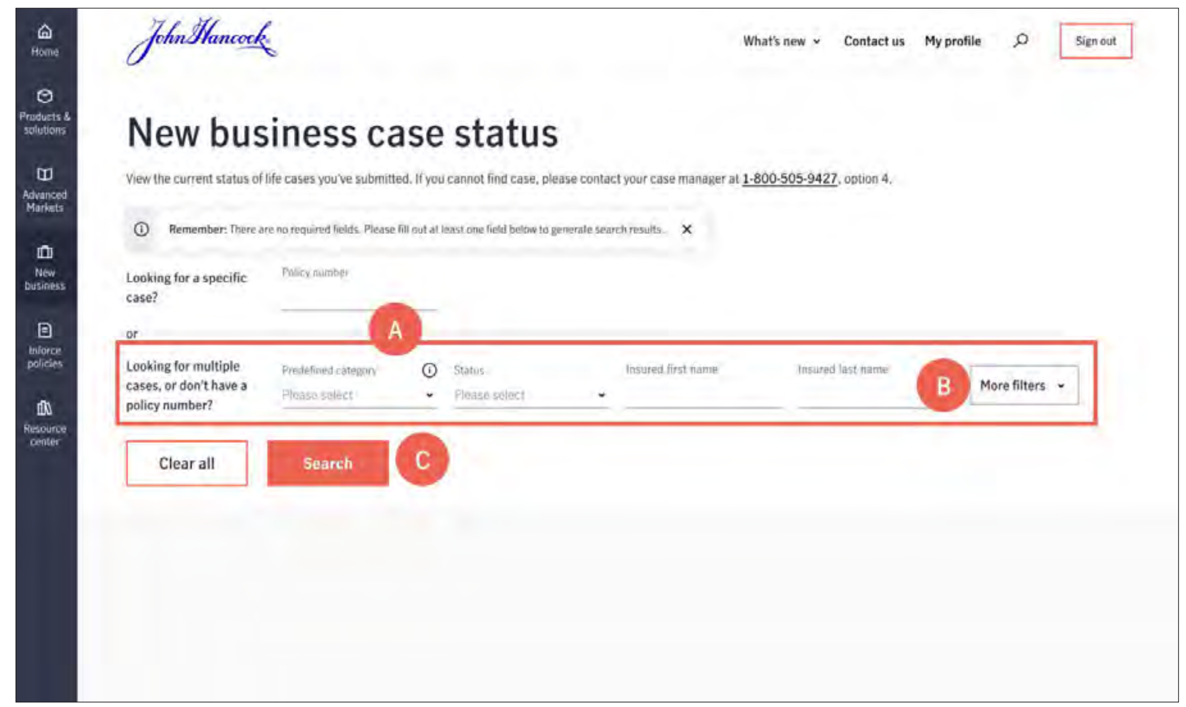
If you are searching by a **policy number**, please refrain from completing any other fields on this page. This will help ensure accurate results.

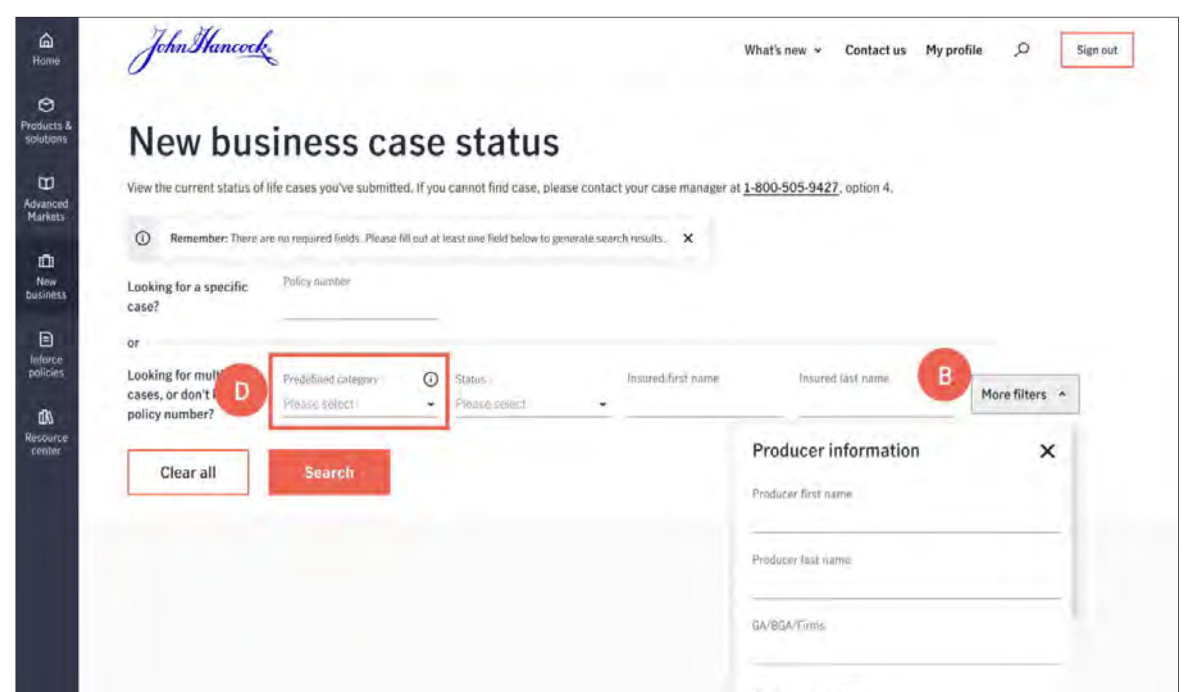


Step 2: Search

Option 2 — multi-case search

- The **multi-case search** gives you the flexibility to search by a combination of criteria to find your case(s) A . You can select criteria in any or all of these categories:
  - **Predefined categories:** includes common search options such as pending cases, issued cases, and closed cases
  - **Status:** filter by new, awaiting requirements, etc.
  - **Insured's first and/or last name**
- If you don't see the search criteria you are looking for, click on **More filters** B and make a selection from the drop down.
- Click **Search** C after entering the applicable criteria.

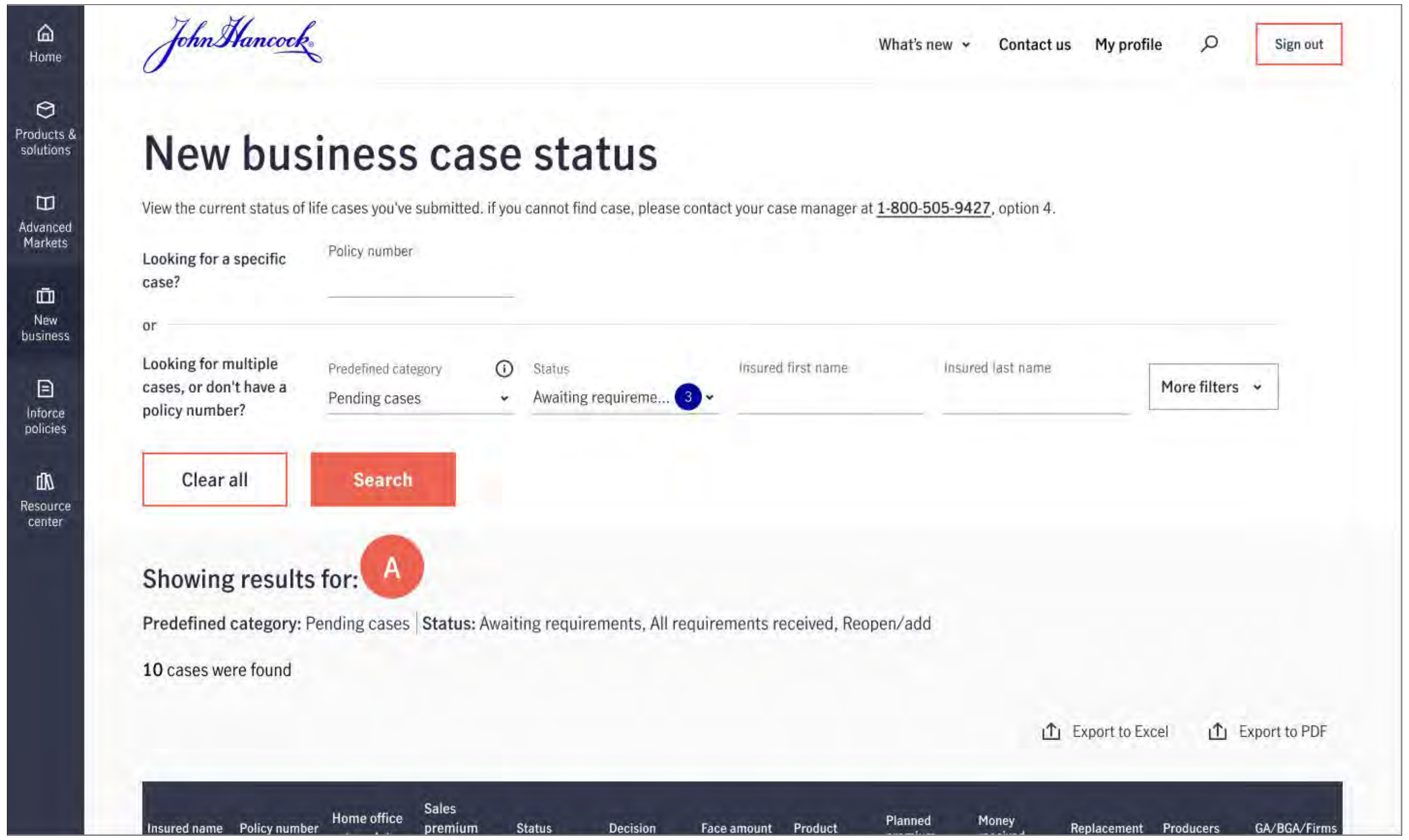


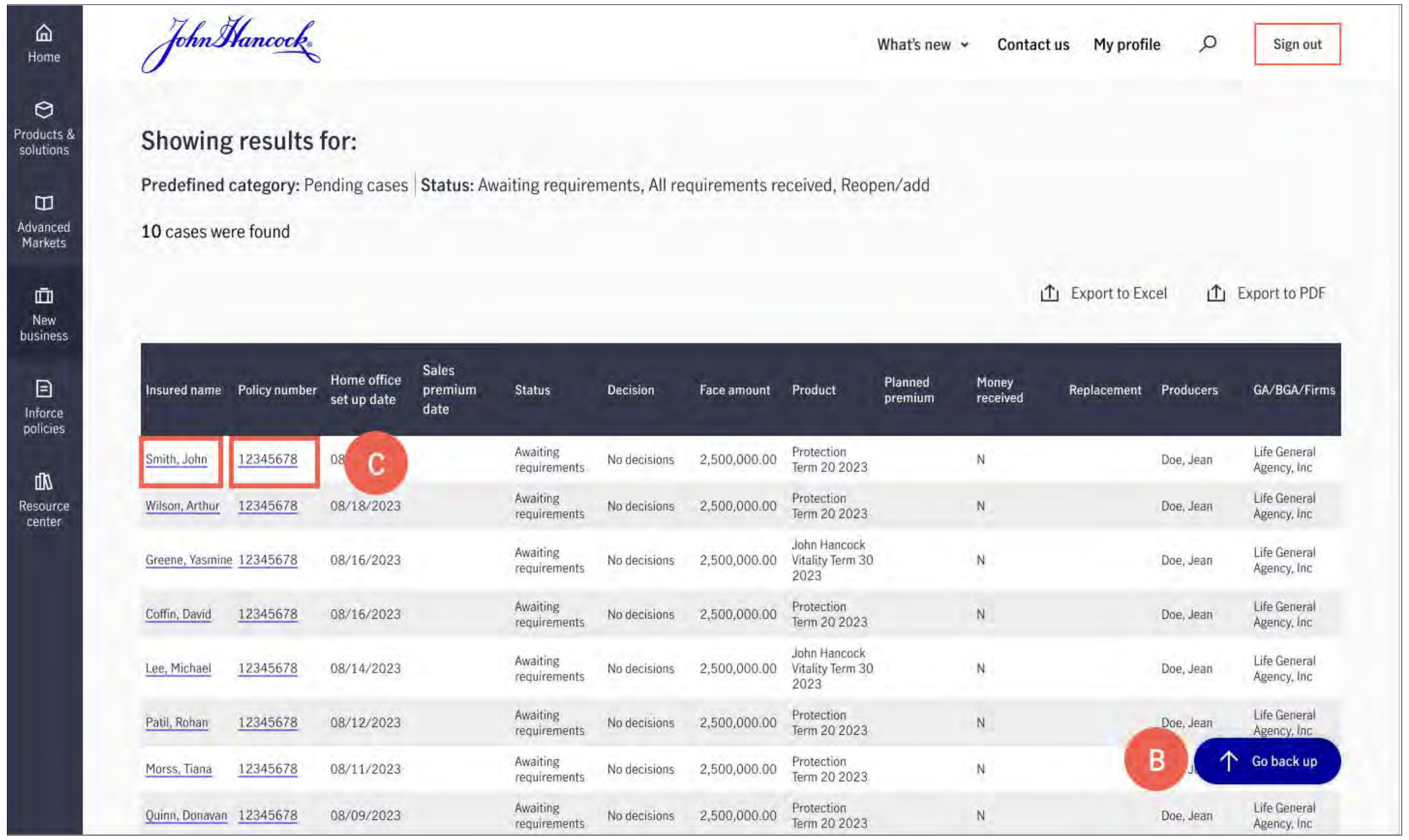


Step 3: Search results

After clicking **Search**, your results will be displayed on the same page — regardless of the search method you used. A

- To refine your search, you can scroll up from your search results or click the **Go back up** button. B
- For additional details on a case, click on the **Insured name** or **Policy number.** C



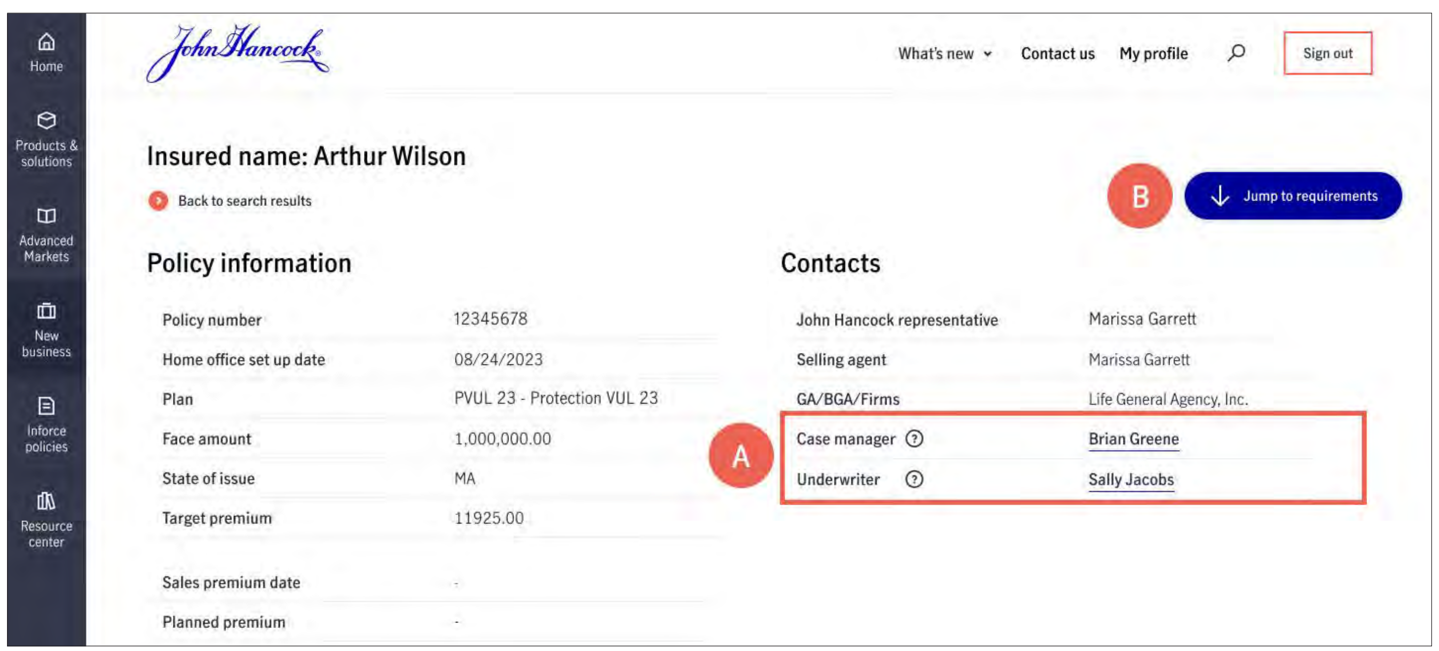


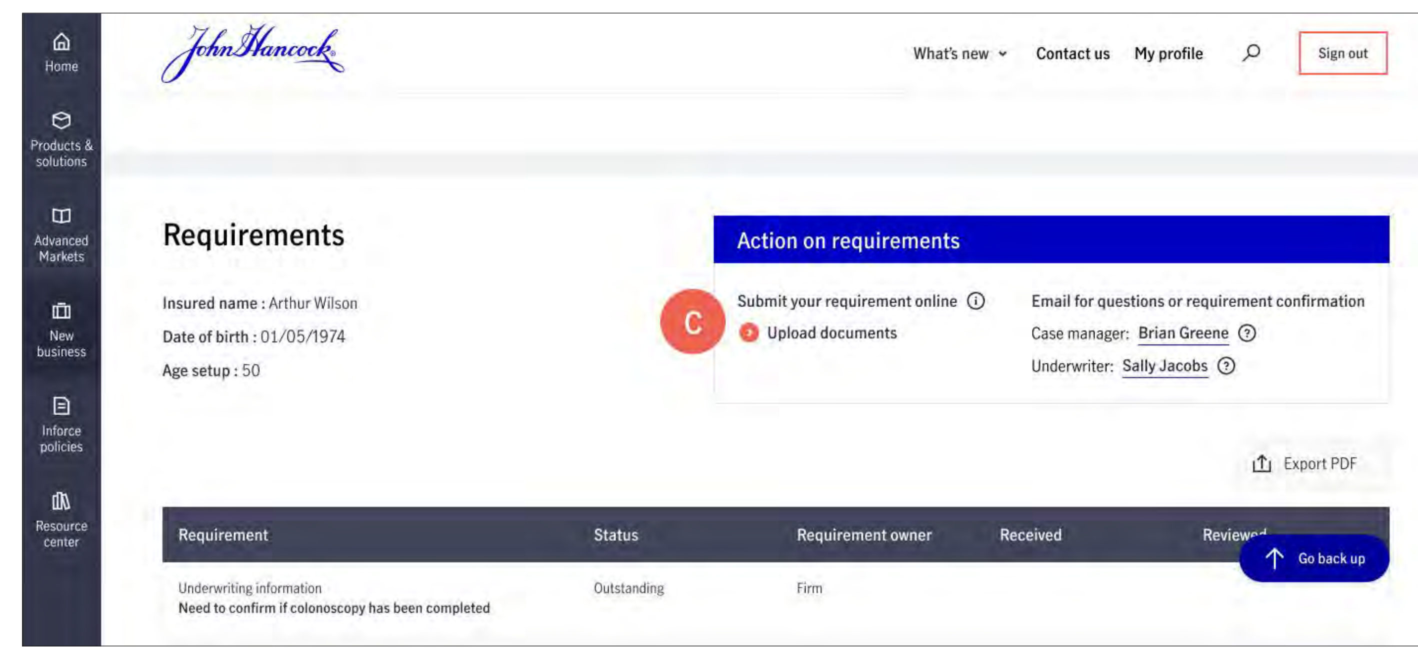
Step 4: Case details

On the case details page, you will see the names of the underwriter and case manager assigned to the case, along with additional policy details and outstanding requirements.

Helpful tips:

- Send an email to the **Case manager** and/or **Underwriter** by clicking their names. A
- Click on the **Jump to requirements** button to go directly to the the requirements section. B
- Submit your outstanding requirements securely directly from the case details page. C





For more information please send an email to **OMC@jhancock.com.**