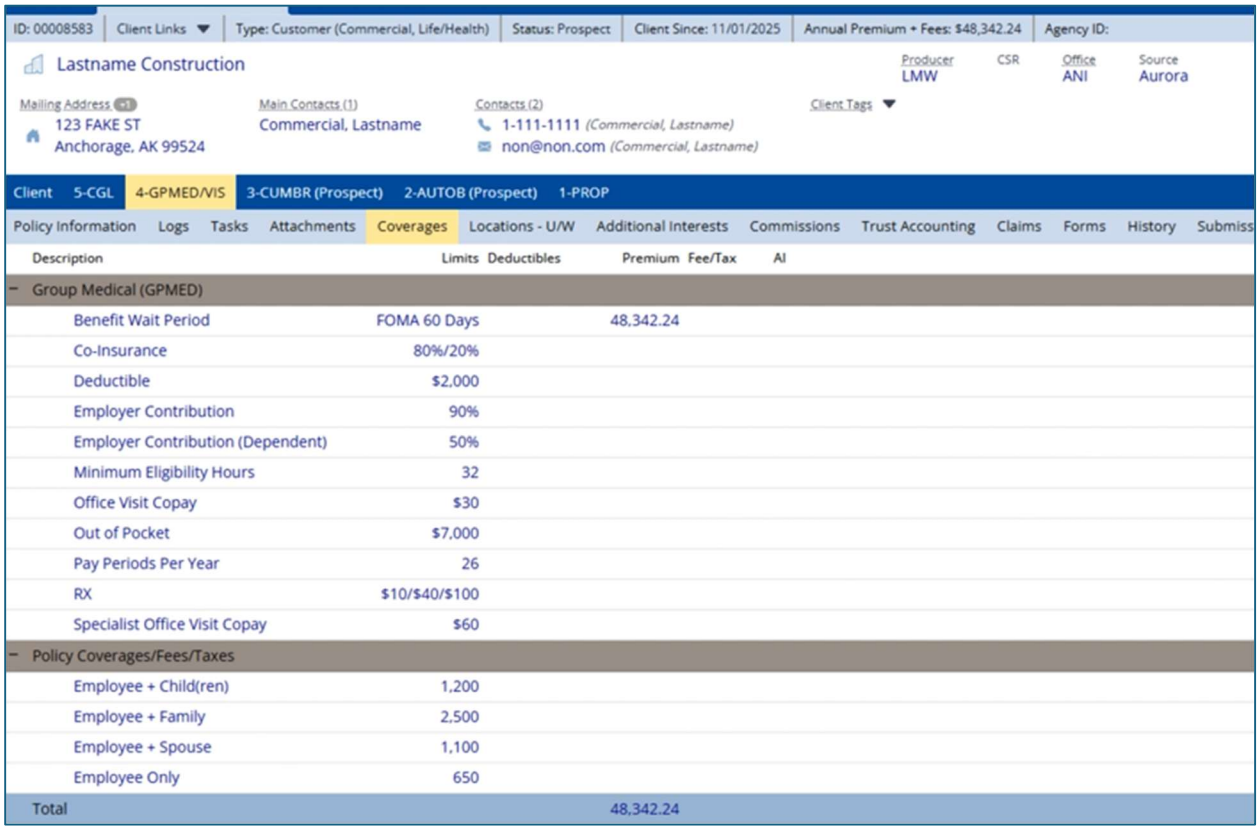
**CUSTOMIZING HAWKSOFT FOR EMPLOYEE BENEFITS**

***(OR ANY SPECIALTY LINE OF BUSINESS)***

Although HawkSoft does not include built-in fields for certain lines of business, agencies can easily create custom data entry fields—called **"coverages"**—for any policy type. While these may not represent traditional P&C insurance coverages, they allow you to record the key policy details your team needs to answer client questions quickly and consistently. This also allows you to push the customized list of policy information to Policy Summaries, Proposals, Email/Letter Templates built in HawkSoft.

Below is an example of a Group Medical policy in HawkSoft with these custom data entry fields ("coverages") completed to capture the information most important to your agency.



ID: 00008583 | Client Links | Type: Customer (Commercial, Life/Health) | Status: Prospect | Client Since: 11/01/2025 | Annual Premium + Fees: $48,342.24 | Agency ID:

Lastname Construction

Producer: LMW | CSR | Office: ANI | Source: Aurora

Mailing Address: 123 FAKE ST, Anchorage, AK 99524

Main Contacts (1): Commercial, Lastname

Contacts (2): 1-111-1111 (Commercial, Lastname); non@non.com (Commercial, Lastname)

Client Tags

Client | 5-CGL | 4-GPMED/VIS | 3-CUMBR (Prospect) | 2-AUTOB (Prospect) | 1-PROP

Policy Information | Logs | Tasks | Attachments | Coverages | Locations - U/W | Additional Interests | Commissions | Trust Accounting | Claims | Forms | History | Submiss

| Description | Limits | Deductibles | Premium | Fee/Tax | AI |
|---|---|---|---|---|---|
| − Group Medical (GPMED) | | | | | |
| Benefit Wait Period | FOMA 60 Days | | 48,342.24 | | |
| Co-Insurance | 80%/20% | | | | |
| Deductible | $2,000 | | | | |
| Employer Contribution | 90% | | | | |
| Employer Contribution (Dependent) | 50% | | | | |
| Minimum Eligibility Hours | 32 | | | | |
| Office Visit Copay | $30 | | | | |
| Out of Pocket | $7,000 | | | | |
| Pay Periods Per Year | 26 | | | | |
| RX | $10/$40/$100 | | | | |
| Specialist Office Visit Copay | $60 | | | | |
| − Policy Coverages/Fees/Taxes | | | | | |
| Employee + Child(ren) | 1,200 | | | | |
| Employee + Family | 2,500 | | | | |
| Employee + Spouse | 1,100 | | | | |
| Employee Only | 650 | | | | |
| Total | | | 48,342.24 | | |

This document will walk you through setting up a new carrier, creating custom policy titles, and building custom coverages to capture key policy details. The examples provided are simply a starting point—you should tailor your setup to match your carriers, product lines, and the information your agency needs to track.

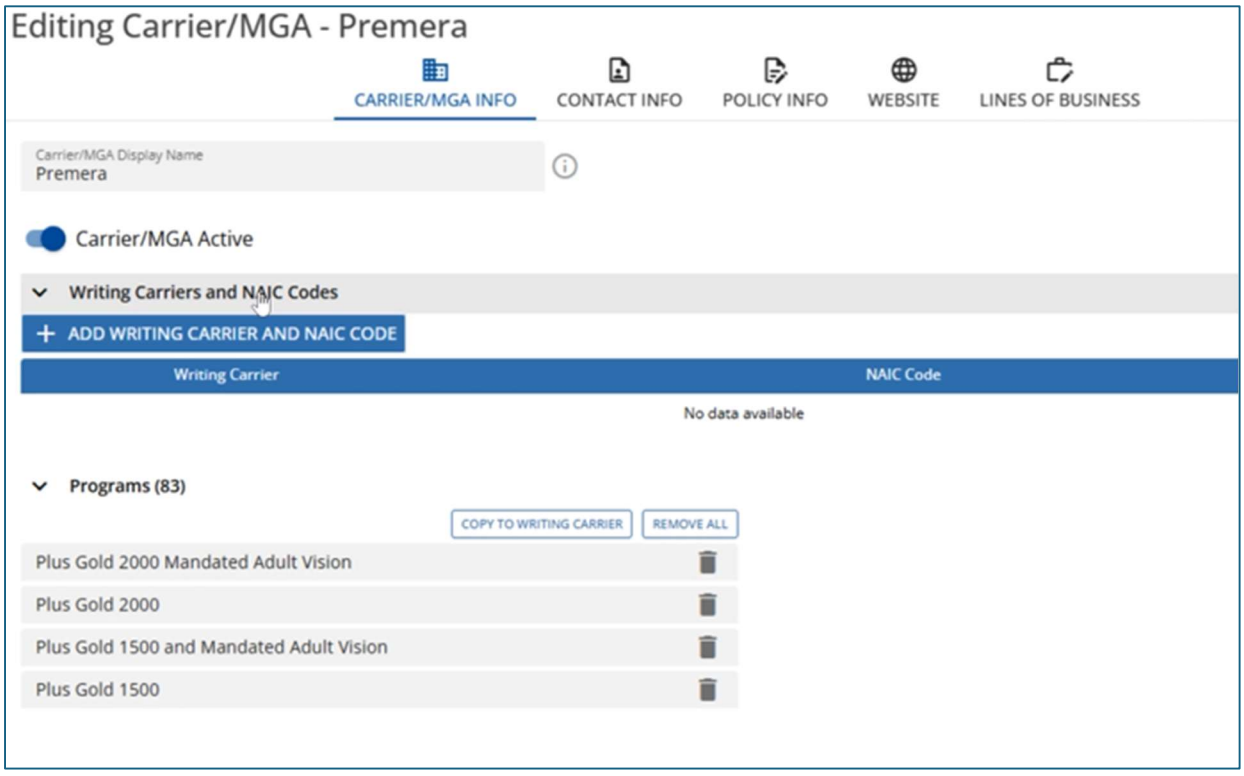
While we illustrate this using Group Medical, the same approach can be applied to configure **any** specialty policy type within HawkSoft.

The setup examples in this guide were provided by **Lynnette Wood of Aurora National Insurance in Anchorage, AK**, who specializes in these lines of business. Lynnette uses HawkSoft extensively to track Group Medical, other employee benefits, and individual life and health policies, and her approach offers a strong starting point for building your own configuration.

While her examples provide valuable guidance, be sure to **adapt and customize** the setup to match your agency's carriers, product lines, and workflow needs.

**Create the New Carrier**

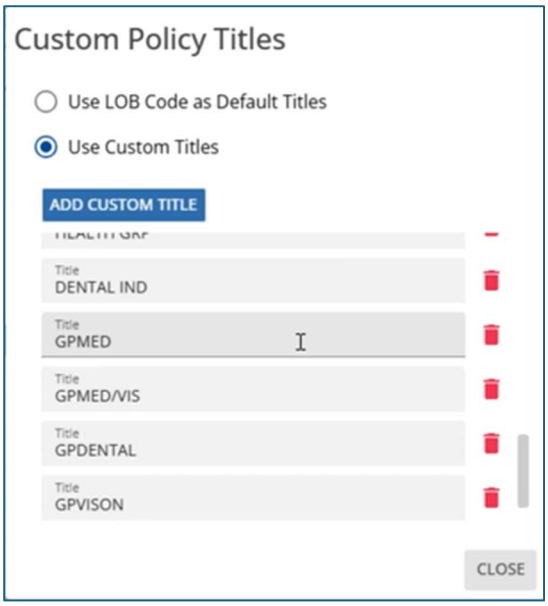
- Go to the Gear icon (Setup Menu) in upper right corner
- Select Carrier/MGA Setup
- Click ADD CARRIER/MGA button
- Select <new Blank Carrier/MGA> in the "Create a new carrier/MGA…" drop-down
- Click CREATE NEW CARRIER/MGA button
- Enter the carrier name
- Enter in any Programs (the types of policies they can sell)



Every year, go through your carriers and update the Programs section (type of policies they can issue/sell). Add new plans, remove plans that no longer exist.

**Creating Custom Lines of Business**

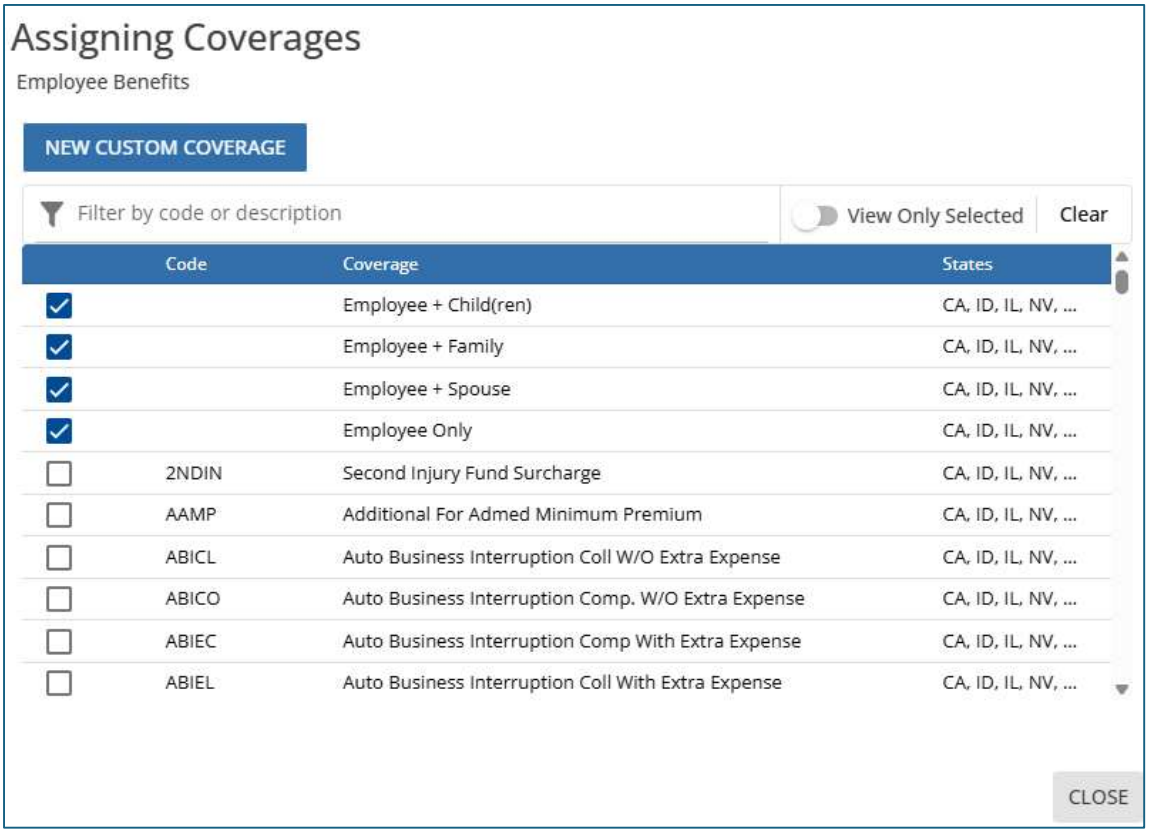
- Go to the Lines to Business tab
- Go to the Employee Benefits tab
- Click the Custom Policy Titles button
- You can Use the LOB codes as Default Titles e.g. GPDEN, GPDIS, GPLIF, GPMED (the codes for the LOB) or you can Use Custom Titles and create your own e.g. DENTAL-GRP, HEALTH-GRP, Vision -GRP . Whatever you do, be mindful of whether these codes have been previously used or not and maintain consistency throughout the system. To use Custom Titles:
    - Place dot in Use Custom Titles
    - Click ADD CUSTOM TITLE
    - Add the following: DENTAL-GRP, HEALTH-GRP, Vision -GRP



**Creating Policy Coverages/Fees/Taxes**

In this section we are entering in the monthly premium based on the type of coverage the employee has. This could also be placed under the coverages for a Line of Business, but it is nice to see it separated out.

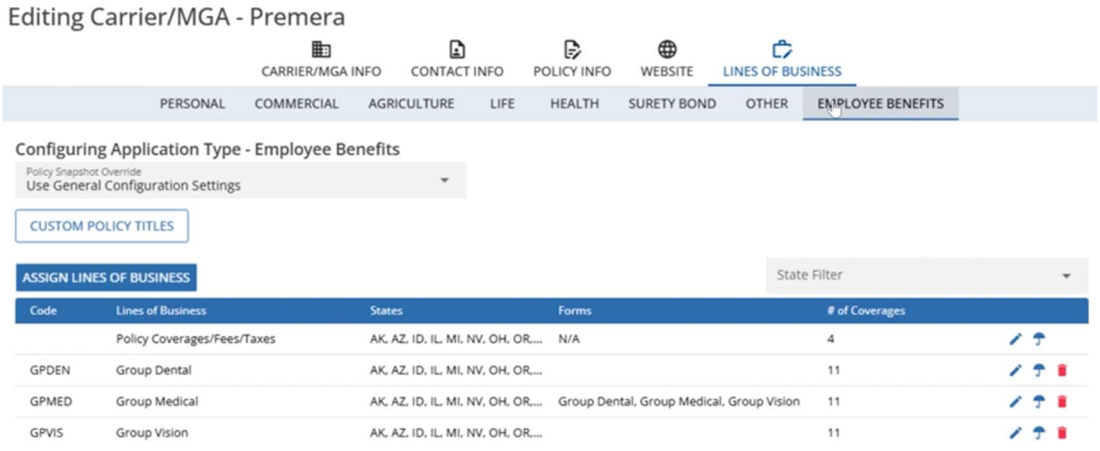
- Click the Policy Coverages/Fees/Taxes line
- Click ADD COVERAGES
- Click NEW CUSTOM COVERAGE
    - Coverage Description: Employee + Child(ren)
    - Limit:
        - Enter all possible amounts or leave blank for free form entry
    - Click ADD
- Recommended "coverages"
    - Employee+Child(ren)
    - Employee + Family
    - Employee + Spouse
    - Employee Only
- When finished adding the "coverages", click CLOSE
- Click ACCEPT



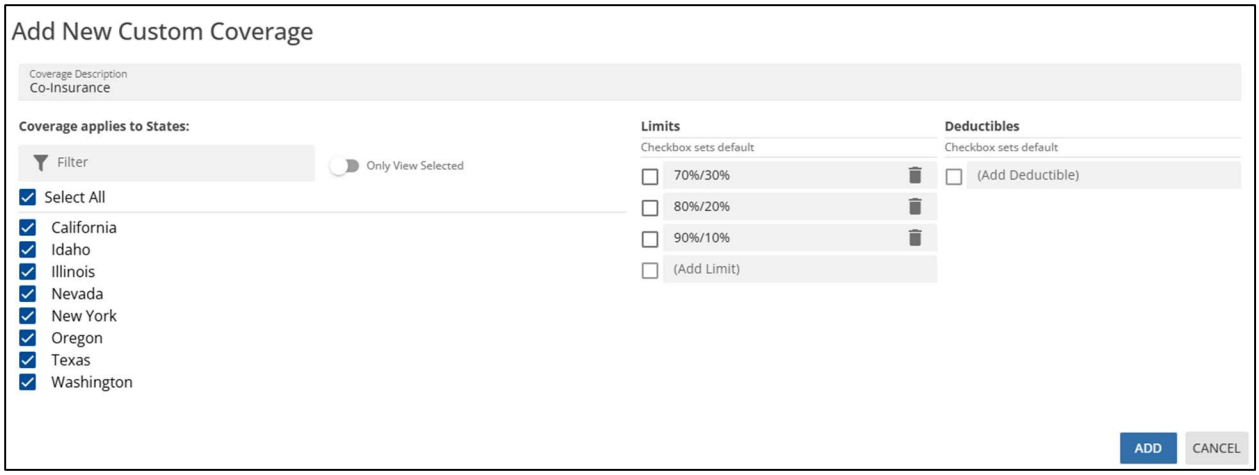
**Creating Custom "Coverages" for Each Line of Business**

Now we're going to enter in any additional things that we might want to know about the policy if the client calls to ask questions.

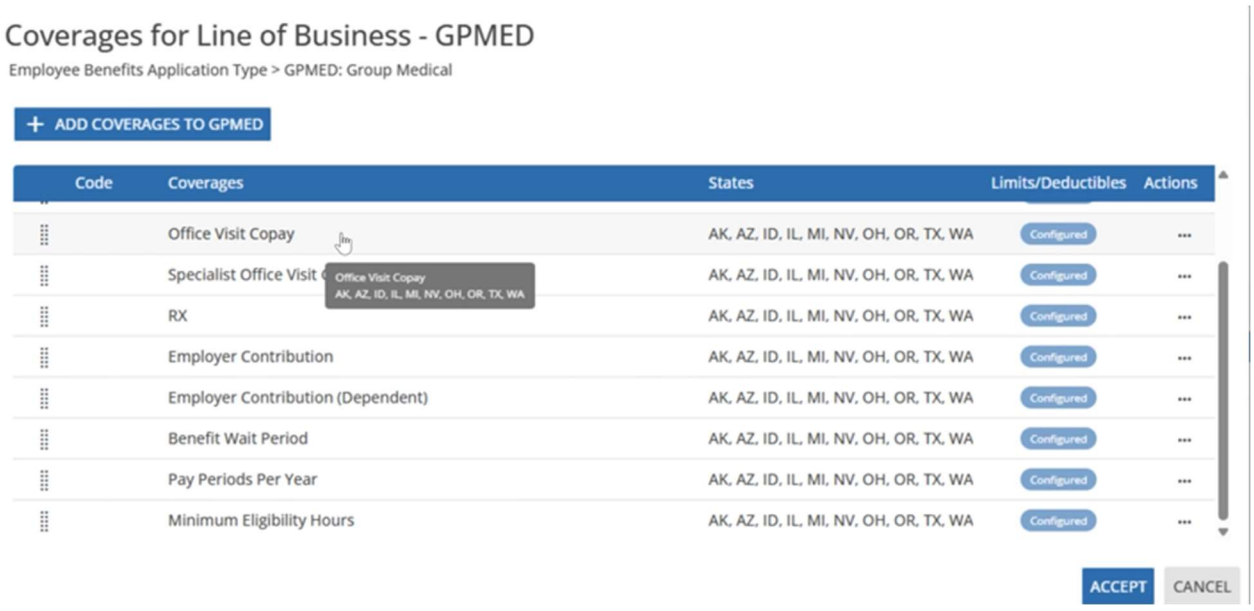
- Click the Assign Lines of Business button
- Check mark any LOBs where you want to create customer "coverages" e.g. GPDEN, GPMED, GPVIS
- Click CLOSE




- Click on the Line of Business you want to create "coverages" for (GPMED)
- Click ADD COVERAGES TO GPMED
- Click NEW CUSTOM COVERAGE
    - Enter in a Coverage Description
    - In either the Limits or Deductible field enter in the standard options that can be selected on the policy for this Coverage. It does not matter which field you use, just be consistent across all coverages and carriers.
    - You can also leave the limits/deductible fields empty to be a free form response.
    - Click ADD
    - Continue the above process for all "coverages" that you wish to track.
    - When all coverages are entered, click CLOSE
    - Click ACCEPT
    - Repeat the above process for all lines of business that you offer with this carrier.
    - Once complete, click SAVE




- Examples of "coverages" you may want to enter for GPMED:
  - Benefit Wait Period
  - Co-Insurance
  - Deductible
  - Employer contribution
  - Employer Contribution (Dependent)
  - Minimum Eligibility Hours
  - Office Visit Copay
  - Out of Pocket
  - RX
  - Specialist Office Visit Copay



Recommended “coverages” for Group Dental

- Policy Coverages/Fees/Taxes
    - Employee Only
    - Employee + Spouse
    - Employee + Family
    - Employee + Child(ren)
- Group Dental Specifically
    - Deductible
    - Max Benefit
    - Preventative Services
    - Basic Services
    - Major Services
    - Orthodontia
    - Employer Contribution
    - Employer Contribution (Dependent)
    - Benefit Waiting Period
    - Pay Periods Per Year
    - Minimum Eligibility Hours

Recommended “coverages” for Group Vision

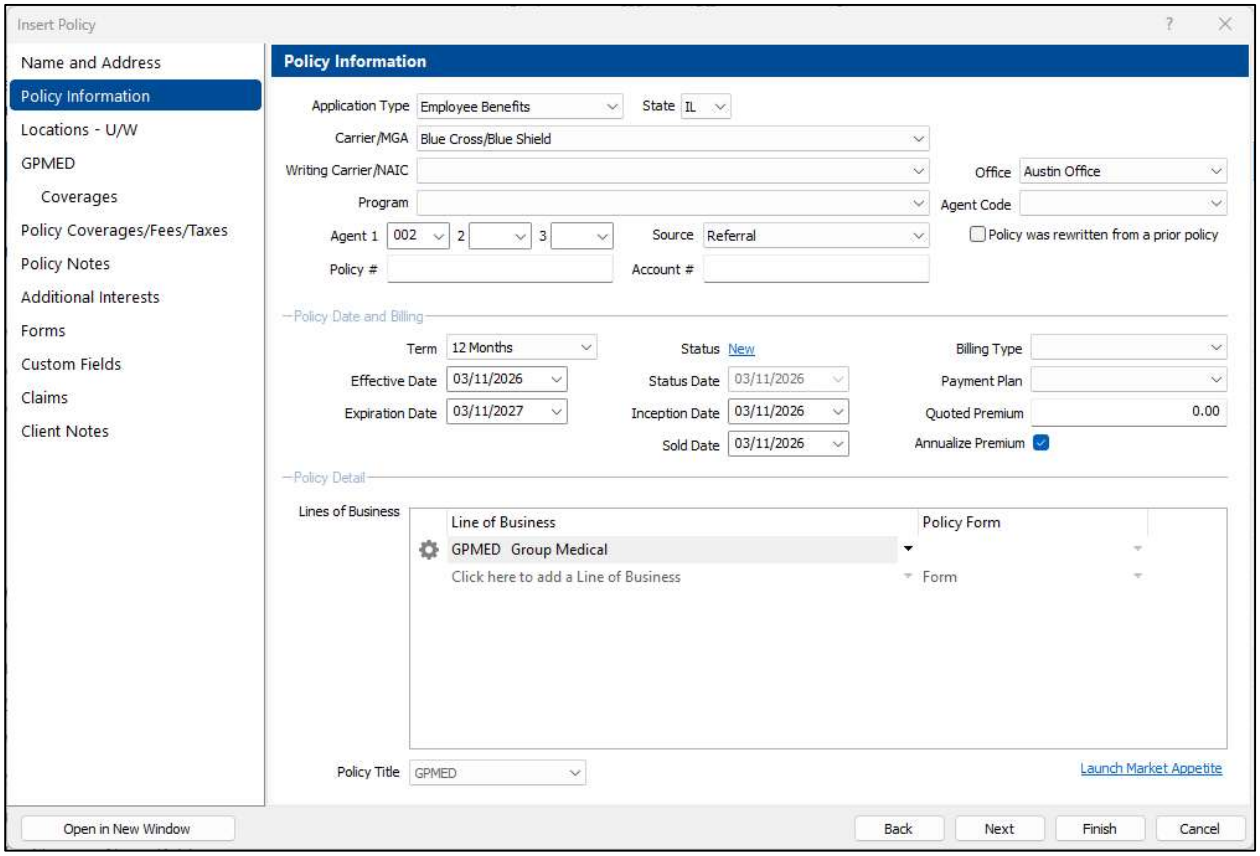
Lines of Business/Coverages

- Policy Coverages/Fees/Taxes
    - Employee Only
    - Employee + Spouse
    - Employee + Family
    - Employee + Child(ren)
- Group Vision Specifically
    - Vision
    - Exams/Lens/Frames Interval
    - Exam, Test and Hardware
    - Vision Exam Copay
    - Lenses
    - Frames
    - Contacts
    - Employer Contribution
    - Employer Contribution (Dependent)
    - Benefit Waiting Period

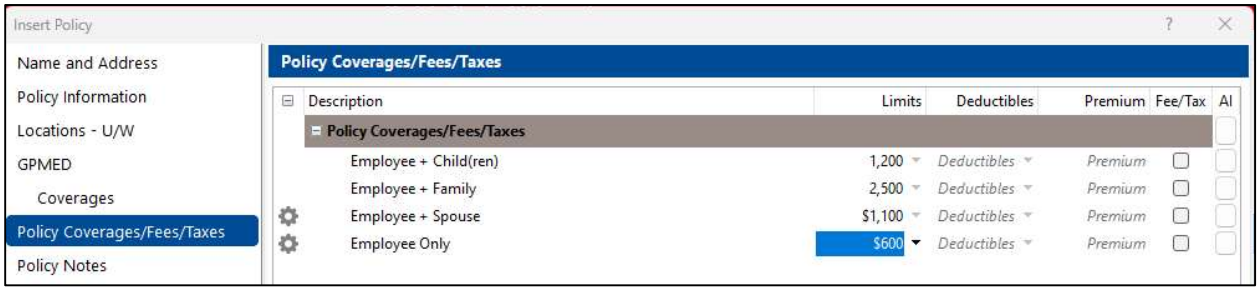
- Pay Periods Per Year
- Minimum Eligibility Hours

**Completing the Policy on a Client Screen**

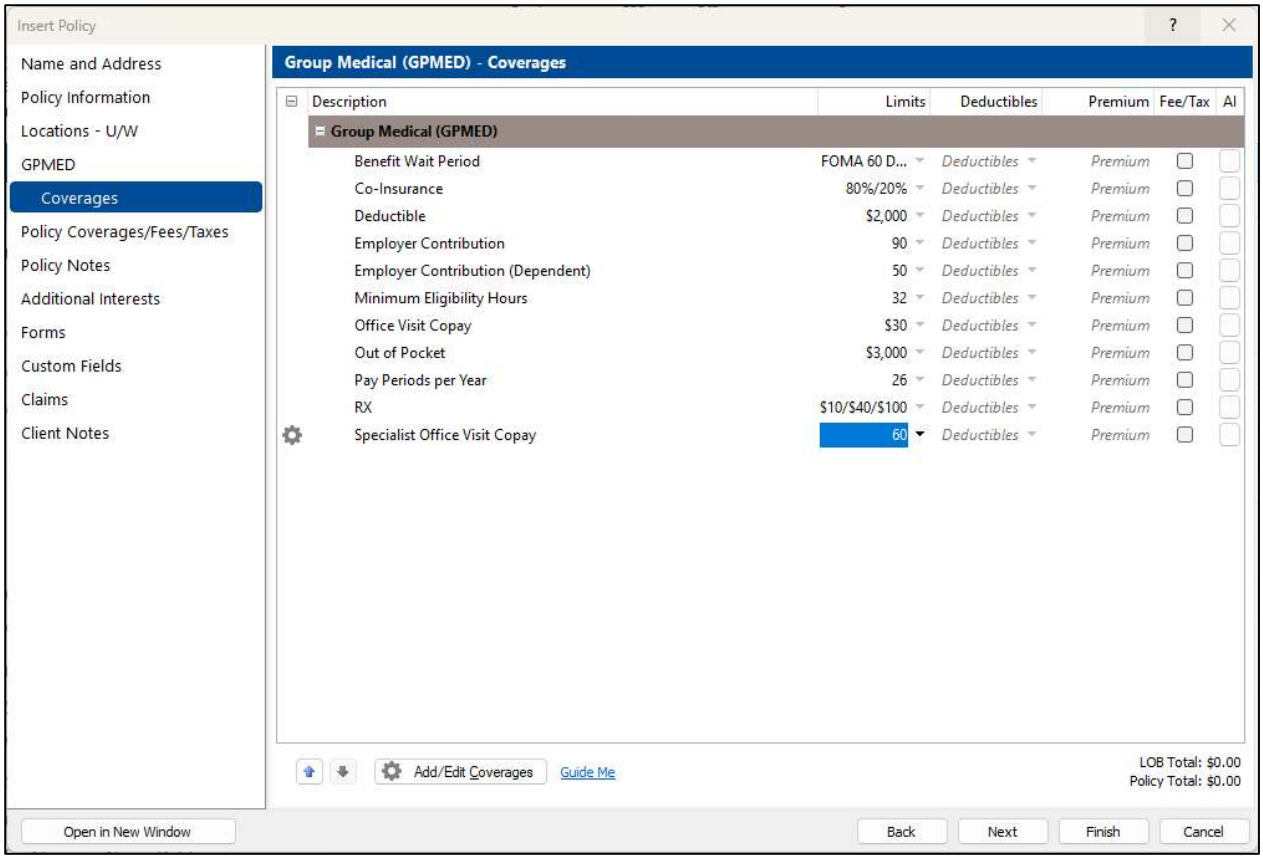
1. Add the policy as you would any new policy selecting Employee Benefits as the type of policy.
2. On the **Policy Information** page, select the company, program, enter the effective and expiration date. You can also enter the annual premium based on the initial month of premium. This premium may fluctuate monthly, but it's up to your agency as to whether or not it's important to update – or when it will be updated (major change to plan, or at renewal, every time there is a change).
3. Under **Lines of Business**, select Group Medical (GRMED).
4. This should change the Policy Title to GPMED as well. If you are using "Custom Policy Titles, " you can open the Policy Title drop-down and select from the list.



5. Go to the **Policy Coverages/Fees/Taxes** tab
6. Click the gear icon in the **Policy Coverages/Fees/Taxes** data entry area, select Add Company/Default Coverages and click OK.
7. Enter the cost of Employee Only, Employee + Spouse, Employee + Family, Employee + Child(ren) in the **Limits** field to the right of each "coverage."

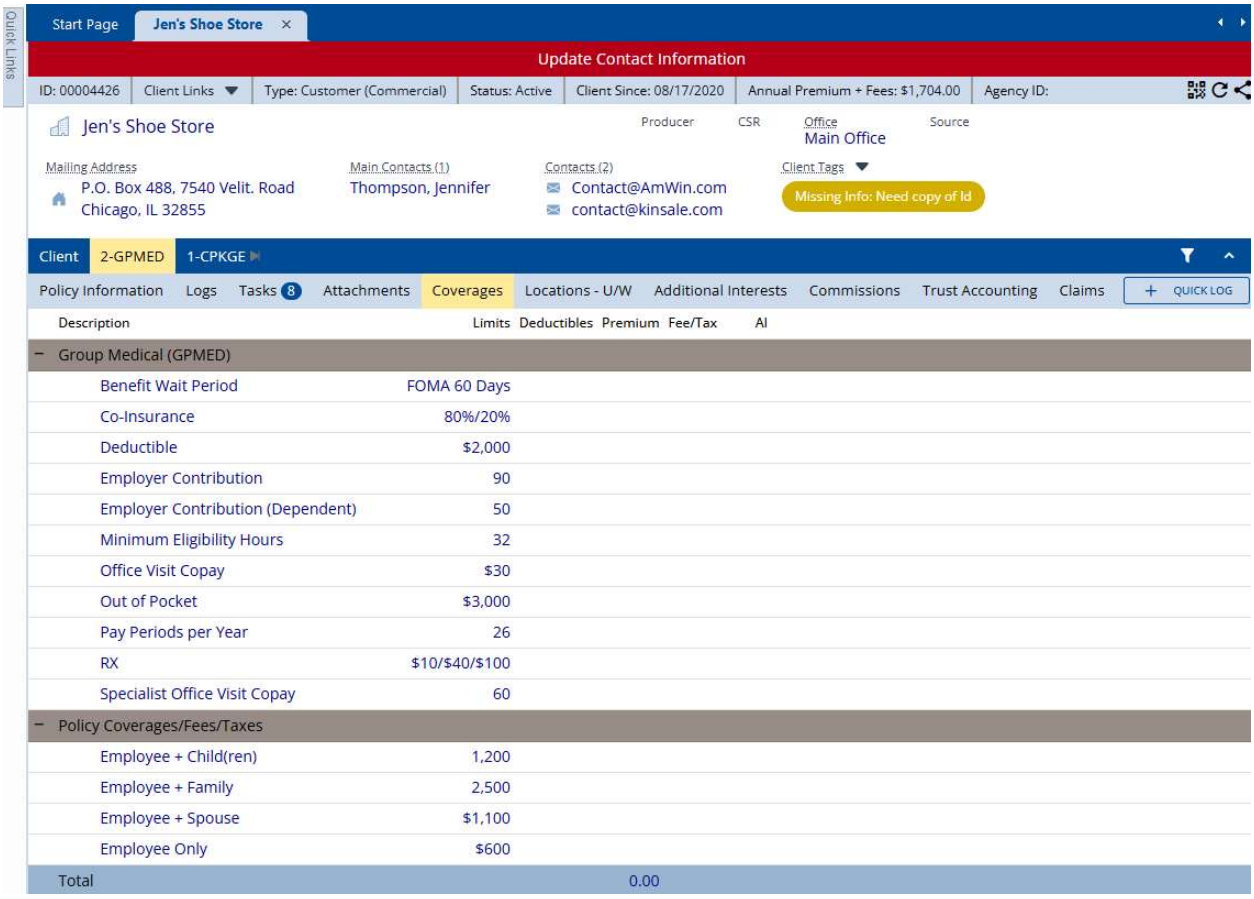



8. Go to the **GPMED ->Coverages tab** tab (if this is not visible, you did not select Group Medical as the line of business in the Policy Information page.
9. Enter the amounts/data for each field in either the limits or deductible fields depending on your agency preference. The data can be selected from the drop-down list if you entered it in Carrier/MGA Setup or typed in manually.




10. Click **Finish** to save and exit.

Adding the information in this way, allows you to see all of it immediately directly from the Client Screen by clicking on the Policy and then clicking on the Coverages tab.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Start Page
Jen's Shoe Store
Update Contact Information
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Client Links
Type: Customer (Commercial)
Status: Active
Client Since: 08/17/2020
Annual Premium + Fees: $1,704.00
Agency ID:
Jen's Shoe Store
Producer
CSR
Office
Main Office
Source
Mailing Address
P.O. Box 488, 7540 Velit. Road
Chicago, IL 32855
Main Contacts (1)
Thompson, Jennifer
Contacts (2)
Contact@AmWin.com
contact@kinsale.com
Client Tags
Missing Info: Need copy of Id
Client
2-GPMED
1-CPKGE
Policy Information
Logs
Tasks 8
Attachments
Coverages
Locations - U/W
Additional Interests
Commissions
Trust Accounting
Claims
QUICK LOG
Description
Limits
Deductibles
Premium
Fee/Tax
AI
Group Medical (GPMED)
Benefit Wait Period
FOMA 60 Days
Co-Insurance
80%/20%
Deductible
$2,000
Employer Contribution
90
Employer Contribution (Dependent)
50
Minimum Eligibility Hours
32
Office Visit Copay
$30
Out of Pocket
$3,000
Pay Periods per Year
26
RX
$10/$40/$100
Specialist Office Visit Copay
60
Policy Coverages/Fees/Taxes
Employee + Child(ren)
1,200
Employee + Family
2,500
Employee + Spouse
$1,100
Employee Only
$600
Total
0.00