

DESK REFERENCE GUIDE TO

CLARITY

LOG IN

1. Go to the login page <https://clarity.agencykpi.com>
2. Enter your Username*
3. Enter your Password
4. Click **Log In**

* Username is usually your email address

RESET A PASSWORD

1. Go to the login page <https://clarity.agencykpi.com>
2. Click "**Don't remember your password**"
3. Enter your email address*
4. Click **Send Email**
5. Follow password reset instructions in your email

UPLOADING REPORTS

1. In the AKPI Tools menu, click **Upload Portal**
2. Click the Upload Reports button
3. Select the time period (the last month included in the report)
4. In the reports upload section, either drag and drop files or click Browse to select files on your computer.
5. Once the files are uploaded, click Submit Reports.

CUSTOMER ACCOUNTS COLUMN SETTINGS

1. Click the Customer Accounts tab from the left menu.
2. Click Column Settings at the top of the table
3. Check the columns you wish to view in the table
4. You may click, hold and drag columns in the order you prefer.
5. Click Save

AGENCY KPI

HOW TO CLASSIFY NAICS CODES

1. Navigate to Customer Accounts section from the left menu
2. Click headers to reorder data in the table. (Example, double click the Premium header to sort the data from greatest to least.) You could arrange by Premium, by like NAICS code, or by like Carrier.
3. You may sort by Code Status at the top of the table.
4. Begin verifying codes and entering codes line by line.
5. A modal will appear to assist in your selection. Once you have made the appropriate edits, click Submit, Override Codes, or Verify Codes.

ALIGN CARRIER APPETITE

1. Click on Carrier Appetite Alignment from the left menu
2. Click on "Select Carriers with Appetite..."
3. Select one or more carriers that you would like to view how their appetite aligns with your book of business.
4. Click on Expand All to view all NAICS codes.
5. Click on any NAICS codes to navigate to the Alignment Dashboard for that NAICS.

NAICS/SIC CODES OR PREMIUM/REVENUE VIEW

1. On the main Clarity Dashboard
2. Under "Business Classification Dashboard," click the toggle button to switch between NAICS/SIC codes or Premium/Revenue

DOWNLOAD YOUR CUSTOMER ACCOUNTS INFO

1. Click the Customer Accounts tab from the left menu
2. Choose either XLSX or CSV from the dropdown menu, located at the top of the table next to the "Columns Settings" button.
3. Click the export icon to download.

CONFIGURE A COMPARATIVE ALIGNMENT REPORT

1. Click the Carrier Appetite Alignment tab
2. Click "Select carriers with appetite..."
3. Select the Carrier you would like to compare
4. Click "Configure Report"
5. To configure your comparative alignment report, click "Select writing carriers in appetite..."
6. Select the Carrier you would like to compare
7. Click "Generate Report" and the report will automatically download to your computer.

NAICS CODES - DID YOU KNOW?

ABOUT NAICS CODES

The North American Industry Classification System (NAICS) is the 6-digit standard used by Federal agencies to classify business establishments for the purpose of collecting, analyzing, and publishing statistical data related to the U.S. economy.

The NAICS standard was adopted in 1997 to replace the 4-digit Standard Industrial Classification (SIC) system, which was initiated in 1937.

The newer standard provides a uniform comparison and presentation of statistical data by grouping businesses and establishments into industries in line with similar processes used to produce goods and services.

WHEN ARE NAICS CODES CHANGED OR UPDATED?

NAICS codes are updated every five years (in years that end in 2 or 7).

WHY DO NAICS CODES CHANGE OVER TIME?

In order to keep on track with the changing economy, NAICS codes are scheduled to be reviewed every five years (in years that end in 2 or 7).

New and emerging industries, revised content, title changes and clarifications of industry definitions are also reviewed.

The review period is the only time new NAICS codes can be considered.

WHO MAKES CHANGES TO NAICS CODES?

The Economic Classification Policy Committee (ECPC) reviews NAICS codes every five years to determine if any changes are needed. After reviewing suggestions from the public, the ECPC submits recommendations to the Office of Management and Budget (OMB). After gathering further public comments, and in consultation with the ECPC, the OMB makes the ultimate decisions on changes.

WHAT HAPPENS TO MY CLASSIFICATIONS WITHIN CLARITY WHEN CHANGES OCCUR?

Clarity is ready for NAICS codes changes. Please note that it may take some time before the new codes appear in Clarity.

When you log into Clarity, you will see "Obsolete NAICS codes found" if codes have changed. A link will be provided for you to jump directly to the Customer Accounts screen to find appropriate NAICS codes. If you dismiss the message, you may return to the Customer Accounts section at a later date and sort by "obsolete" to find them again.

When you click on an "obsolete" code, a modal window will open and suggest new codes based on a NAICS code crosswalk. However, the code crosswalk may not suggest a new code in some cases.

It is important to note that all codes with an "obsolete" status will not be shown in any of the other screens within Clarity. "Obsolete" codes must all be changed to an appropriate NAICS code to become visible in the dashboard and alignment screens.

Still need help? Email our support team:

help@agencykpi.com