## **Review and Compare Policy Transactions**



#### Description

This job aid describes how to view Policy Transaction history on a policy, and review specific changes made within each transaction. This job aid also includes steps for comparing two Policy Transactions.

#### **Review Policy Transactions**

Step 1						
Action	Screen					
On the <b>Summary</b> screen:	Actions 🕀	<ul> <li>Summary</li> </ul>	Personal Auto Indiana Maria Print ICI Cand	Teledo Account: 39453	25404 Policy: 91138 502757 In Porte (Exp. 04/26	
<ul> <li>Select History from the Actions menu on the left.</li> </ul>	Lienholder/Addition     Quiste     Forms Date     Jo/26/2023	Current Activities Created Date ‡ Dud	e Date ‡ Priority ‡ Subject :	:	Cancelled Agent Override No Underwritting Companies Dependers Insurance Company Assigned To ‡	
	<ul> <li>Fools</li> <li>Summary</li> <li>Contacts</li> <li>Participants</li> <li>Notes</li> </ul>	11/10/2022 09/ 11/10/2022 03/ 11/10/2022 03/ 11/10/2022 03/ 11/10/2022 03/ 03/17/2023 03/ 09/16/2023 09/ Completed Policy	14(2021         Hormal         (A_ACT_3)           15(2022         High         (A_ACT_3)           17/2022         Normal         (A_ACT_3)           16(2022)         Normal         (A_ACT_3)           16(2022)         Normal         (A_ACT_3)           18(2023)         Normal         (A_ACT_3)           18(2023)         Normal         (A_ACT_3)	<ol> <li>Get Mator Vehicle Repo O Blocked - Pending Hene II Get Motor Vehicle Repo II Get Motor Winicle Repo II Get Motor Vehicle Repo II Get Motor Vehicle Repo III Get Motor Vehicle Repo</li></ol>	rts Customer Service wal 37145523 - Action Regulard Customer Service rts Customer Service rts Customer Service rts Customer Service	
	Availlable Coverages     Documents     Documents     Document Valit     Trailing Documents.     Policy Tranactions	Period Eff Date 3     10/26/2023     04/26/2022     10/26/2022     04/26/2022     04/26/2022     04/26/2022     04/26/2022	Trans Eff Date         Trans Class           10/26/2023         09/22/2023           0/26/2023         09/22/2023           11/10/2022         11/10/2022           10/26/2022         09/22/2022           00/26/2022         09/22/2023           10/26/2021         09/22/2023	e Date © Type © H Renewal Hanewal Policy Chang Henewal Henewal Henewal	Teranaction # ©         Premium ©         Tetal Cast ©           10025506         \$1,406.33         \$2,406.33           1000041         \$1,406.33         \$2,406.3           1001041         \$1,406.33         \$2,406.7           442123         \$1,406.35         \$2,406.7           179209         \$1,406.35         \$1,406.7           1294005         \$1,406.70         \$1,406.7	
	Unidenveiting     Inistory     Neference     Financial Transactions	04/26/2021 Pending Policy Tra Period Eff Bate 2	04/26/2021 04/26/202 nsactions Compare Trans Eff Date C Status C Te	Submission Type 1 Transaction # data to display	131918 \$1,406.33 \$1,406.3	
Step 2						
Action			S	Screen		
On the <i>History</i> screen, review the Policy Transactions on the policy:	History					
<ul> <li>Select the Policy Transaction # link to view the changes specific to that transaction.</li> </ul>	User Related To	Policy	: 9113K 502757 Personal	elect User	Date	MM/dd/yyyy
Note: The User column has the name of the	<u>S</u> earch <u>R</u> eset				To	MM/dd/yyyy
user who initiated the Policy Transaction.	Туре	User	Event Timestamp 🌲	Effective Date	Description ≑	Policy Transaction
	Renewal	Renewal Daemon Renewal Daemon	09/22/2023 1:18 AM 09/22/2023 1:18 AM	10/26/2023	Renewal "Version #1" finished issu Renewal "Version #1" finished quo and is pending renewal.	ing. 35825886 ting 35825886
	Renewal	Renewal Daemon	03/23/2023 12:20 AM	04/26/2023	Renewal "Version #1 (1)" finished	30600491
	Renewal	Renewal Daemon	03/23/2023 12:20 AM	04/26/2023	Renewal "Version #1 (1)" finished quoting and is pending renewal.	30600491
	Renewal	System User	02/10/2023 1:18 AM	04/26/2023	Renewal "intermediateSourcePerio with status "New" was withdrawn.	od" 30600491
					Policy Change Issued	A DECEMBER OF THE OWNER
	Policy Change Issued	Diane A Steen	11/10/2022 11:20 AM	11/10/2022	Folicy change issued	508016
	Policy Change Issued PolicyChange created	Diane A Steen Diane A Steen	11/10/2022 11:20 AM 11/10/2022 11:13 AM	11/10/2022	PolicyChange created	508016 508016
	Policy Change Issued PolicyChange created Renewal	Diane A Steen Diane A Steen Renewal Daemon	11/10/2022 11:20 AM 11/10/2022 11:13 AM 09/22/2022 12:05 AM	11/10/2022 11/10/2022 10/26/2022	PolicyChange created Renewal "Version #1 (1)" finished issuing.	508016 508016 442121

### **Review and Compare Policy Transactions**



#### Step 3

Otch 2	
Action	Screen
The <i>Quote</i> screen displays the selected Policy Transaction.	Actions  Policy Change (Bound)  Personal Auto Indiana Effective: 11/10/2022 Maria Toledo Account: 1969325404 Policy: 9113K1 Policy Change Stöth16 QUOTE  Ratk Next>
<ul> <li>To view more detailed information, go to the <i>Policy Review</i> screen.</li> <li>Select <b>Policy Review</b> from the <b>Actions</b> menu on the left.</li> </ul>	Policy Change 508016 Bound       Policy Lange 508016 Policy Contract.       Policy Humber       \$113K 502757       Policy Period       10/26/2022 - 04/26/2023         Policy Contract.       Policy Address       \$55 FERRA KE_ PONTAGE, IN 46368-2410       Previous Policy Full Term       \$1,333.40         Policy Info       Drivers       County       PORTER       New Policy Full Term       \$1,333.40         Previous Policy Full Term       \$1,333.40       Premium       New Policy Full Term       \$1,333.40         Previous Policy Full Term       \$1,333.40       Premium       New Policy Full Term       \$1,333.40         Vehicles       Underwriting Company       Depositors Insurance Company       Premium       0         Vehicles       Summary       Premium Details       Fees       Cost Change Details       Applied Discounts/Surcharges       Rate Capping         Lenholder/Additional Int       Inderwriting       No Discounts Applied       No Discounts Applied       Vehicle Level Discounts/Surcharges         No Discounts Applied       No Discounts Applied       No Discounts Applied       No Discounts Applied
Step 4 Action	Screen
On the <i>Policy Review</i> screen, you can review the differences by comparing the information in the <b>Existing Policy</b> and <b>Policy Change</b> columns.	Policy Review     < Back     Next>       Differences       Comparing Existing Policy and Policy Change: 508016
the changes made on the policy. Note: This screen displays different	Item     Existing Policy     Policy Change: 50801 <ul> <li>Policy Info</li> <li>Primary Named Insured: Maria Toledo</li> </ul>
information depending on the policy type.	Marital Status     Single     Married       SmartRide Texting No     SmartRide Text Notification     Yes     No
	✓ Drivers       ✓ Driver: Maria Toledo       I Marital Status       ✓ Driver: Victor Salt
	<ul> <li>✓ SmartRide</li> <li>SmartRide</li> <li>√</li> </ul>

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#### **Compare Policy Transactions**

#### Step 1 Action Screen From the Policy Transactions screen, you can F PolicyCenter™ Desktop ▼ Account V Policy V Search V Team Administration V Tes compare two transactions. Actions 🧰 Policy File Personal Auto Indiana Veronica S Salt Account: 2656709063 P You can review Policy Transaction details by **Policy Transactions** Policy Contract clicking the arrow button to the left of the Type Policy Info - 1 column. Drivers Type 🗅 Effective Date 🚖 Transaction Status 🚖 Current Status 🛎 Policy Change 10/16/2021 Bound In Force Select the checkbox to the left of the two Accidents/Violations Policy Change 10/16/2021 Bound In Force Policy Transactions you would like to Vehicles Policy Change 10/16/2021 Bound In Force compare. In this example, select the • Usage Based Insurance Policy Change 10/16/2021 Withdrawn Withdrawn checkboxes to the left of the Policy Policy Change 10/16/2021 Bound In Force Coverages Change and Reinstatement Work Orders. Policy Change 10/16/2021 Bound In Force Lienholder/Additional.. Policy Change 10/15/2021 Withdrawn Withdrawr Ouote Select the Compare button. Policy Change 10/15/2021 Withdrawn Withdrawn Forms Policy Change 10/15/2021 Bound In Force Submission 10/15/2020 Bound In Force Date 🗊 10/16/2021 👶 Tools **Policy Change Details** Step 2 Action Screen The Differences Between Pending Policy F PolicyCenter" Desktop ▼ Account ▼ Policy ▼ Search ▼ Ieam Administration ▼ Testing ▼ Training ▼ : 🛛 🙆 Go to Transactions screen displays the difference Policy Contract Policy File 🚓 Personal Auto Indiana Veronica S Salt Account: 2656709063 Policy: 9113J 100080 In Force (Expiration: 04/15/2022) between the two Policy Transactions. Policy Info Differences Between Pending Policy Transactions [Return to Policy Transact Drivers Policy Change: 16784218 Policy Change: 16853873 Click the arrow to the left of Vehicles to Create Time 10/16/2021 1:48 PM 10/16/2021 1:54 PM Effective Date 10/16/2021 12:01 AM 10/16/2021 12:01 AM see the detailed differences. ersion Statu Bound Premium Totals \$1,358.32 \$1,431,24 In this example, the Policy Change affected Comparing Policy Change 16784218 and Policy Change 16853873 the premium amount. Item Policy Change 16784218 Preemptions: Policy Change 16853873 • Quote 2016 HOND ODYSSEY EX 2: 40 W WASHINGTON ST, INDIANAPOLIS, IN 46204-3402 1: 100 S MUESSING ST, INDIANAPOLIS, IN 46229-2927 Note: An "x" indicates the line item has been 10/16/2021 Garage Location removed from the policy. A check mark indicates the line item has been added to the policy. (Not shown in this example.) Click the Return to Policy Transactions link to return to the Policy Transactions screen, where you can compare additional Policy Transactions, if desired.

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