

## Add Scheduled Items (Valuables Plus)

### In Brief

In this Quick Card, you will change the Property policy to add scheduled items (Valuables Plus) to a policyholder's existing policy.

Log in to the [VTO](#) using the appropriate generic user account from the [VTO Information Guide](#) document.

### Quick Card

**IMPORTANT:** This is a test environment. The next seven (7) steps are ONLY used in the VTO.

#### Clone the Policy

1. Click the down arrow to the right of the **Training** button on the **Tab Bar**. Select "Create your own policy for training" from the drop-down list.
2. Enter "9113HR001420" in the **Policy Number** field exactly as it is shown, including spaces and capital letters.
3. Click the **Search Work Orders** button.
4. In the *Originals* section, click the checkbox to the left of the **Submission** Transaction Type for the policy being cloned. In this example, select the checkbox to the left of Transaction # **65640845**.

| Close Date | Transaction # | Policy #     | Type       | Comments | Status | Export as Status* | Export as Submission | Product           |
|------------|---------------|--------------|------------|----------|--------|-------------------|----------------------|-------------------|
| 04/28/2021 | 65640845      | 9113HR001420 | Submission |          | Bound  | Bound             |                      | Personal Property |

  

| Create Date | Transaction # | Type       | Comments | Status | New Policy # | New Account # | Product           | Underwriter      |
|-------------|---------------|------------|----------|--------|--------------|---------------|-------------------|------------------|
| 04/28/2021  | 79185560      | Submission |          | Bound  | 9113HR001421 | 4369089601    | Personal Property | Janine B LaCroix |

5. Click the **Copy Selection** button.  
**Note:** If the *Copies* section does not automatically populate, click on the **Search** tab, then back on the **Training** tab. The clone information should be visible.
6. Scroll down, if necessary, to the *Copies* section.
7. Click the link in the **New Policy #** column.

**IMPORTANT:** This is a test environment. This data is not valid. The VTO is not connected to the rating system, but in production, you will see the correct premium.

### Summary screen

8. Click the **A**ctions button.
9. Select “**C**hange Policy” from the drop-down list.

### Start Policy Change screen

10. PolicyCenter defaults the **E**ffective Date to the current system date. If necessary, you can change the date to a future date. In this example, accept the current date.
11. Click the **N**ext > button.

### Policy Info screen

12. Click the **V**aluable Plus (Inland Marine) link.

### Valuable Plus (Inland Marine) screen

13. Enter “1” in the **N**umber of Items to add: field in the *Jewelry Scheduled Items*.
14. Click the **A**dd button.
15. Enter information into the **D**escription field. For example, “**K**ay Jewelers LEO **D**iamond 4CT Tennis Bracelet”.
16. Enter “3750” in the **V**alue field.
17. Enter “03162021” into the **A**ppraisal Date field.
18. Click the **Q**uote button.

### Quote screen

19. Click the **I**ssue Change button.
20. Click the **O**K button.

### Policy Change Bound screen

PolicyCenter displays the message, “*Your Policy Change (#XXXX) has been bound.*”