Create an Activity

In Brief

In this Quick Card, you will create an activity on an existing policy and assign it to a specific user in PolicyCenter.

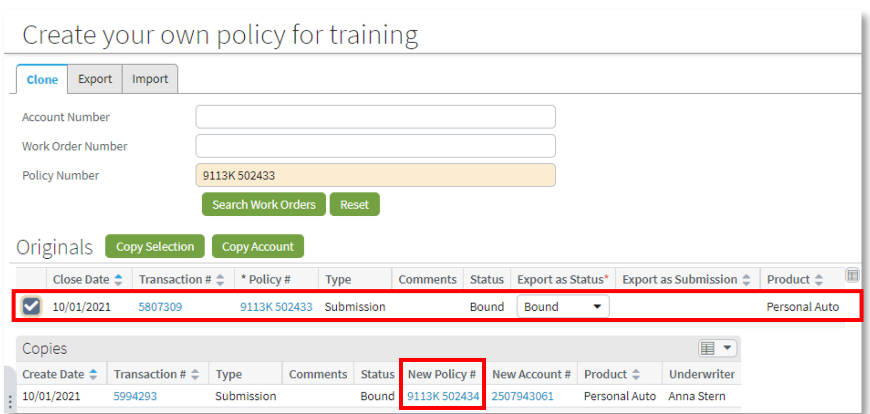
Log in to the VTO using the appropriate generic user account from the **VTO Information Guide** document.

Quick Card

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

Clone a Policy

1. In the PolicyCenter VTO, 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 "9113K 502433" 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 #5807309.



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: PolicyCenter automatically created a **New Account #**. The new account is linked to the *cloned* policy, not the original.

Summary screen

8. Click the **Actions** button.
9. Select "**New Activity** > **Request to Underwriting > Underwriter > Accident/Violation Correction**" from the drop-down list. The *New Activity* section opens at the bottom of the *Summary* screen.

NOTE: On the left side of the screen, the **Subject**, **Description**, **Due Date,** and **Escalation Date** fields default but you can change the fields as necessary.

10. Accept the default for the **Subject** field.
11. Enter "**Verification of Violation Removal**" in the **Description** field.
12. Accept the defaults for the **Due Date**, and **Escalation Date** fields.
13. Ensure "**Underwriter"** defaults in the **Assigned To** field.
14. Complete the *New Note* section on the right side of the screen.
15. Select "**Policy Verification**" from the **Topic** drop-down list.
16. Enter "**Verification of Violation Removal**" in the **Subject** field.
17. Enter "**Proof the violation was removed from the policyholder's driving record has been received.**" in the **Text** field.
18. Click the **OK** button to send the activity to the assignee.

Once the activity has been sent, it displays on the *Summary* screen of the policy in the *Current Activities* section. It also displays in the Recent Notes section at the bottom of the screen.