Change Mailing Address

In Brief

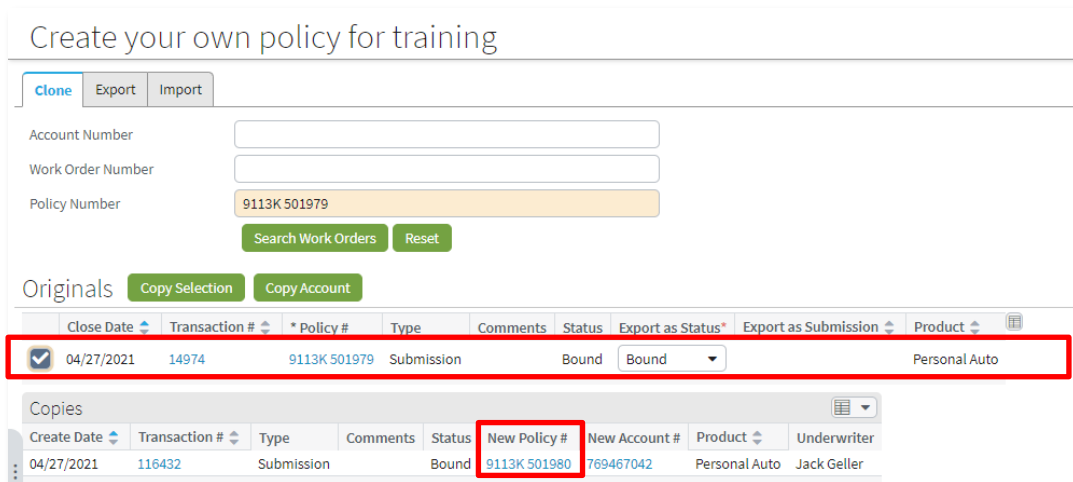A **policyholder** calls and asks to update the mailing address on her Auto policy.

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 "**C**reate your own policy for training" from the drop-down menu.
2. Enter "9113K 501979" 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 #14974.

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 <u>A</u>ctions button.
9. Select "**Change Policy**" from the drop-down menu.

Start Policy Change screen

10. PolicyCenter defaults the **Effective 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 <u>N</u>ext> button.

Policy Info screen

12. In the *Policy Address* section, click the **down arrow** button to the right of **Change To:**
13. Select "**New Address"** from the drop-down list.

Address Detail screen

14. Add the new address: "**40 W WASHINGTON BLVD, INDIANAPOLIS IN 46224**".
15. Click the **OK** button.

NOTE: All changes to a policy require the policy to be requoted.

16. Click the <u>Q</u>uote button.

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.

Quote screen

17. Click the <u>I</u>ssue Change button.
18. Click the **OK** button.

Policy Change Bound screen

PolicyCenter displays the message, *"You Policy Change (#XXXX) has been bound."*