

Change the Dwelling Location on A Tenant Policy

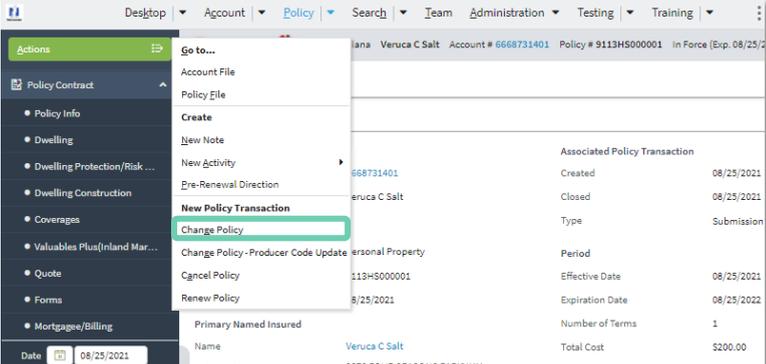
PolicyCenter



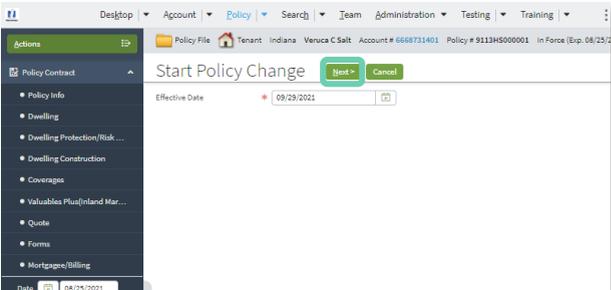
Description:

This job aid describes how to change the dwelling location on a tenant policy. The dwelling location name is the physical location of the property and typically the same as the policy address (mailing address) for the policy. In some instances, the location address and policy address may be different. One example is when the policy address is a post office box. If the location change is for an out-of-state address, you must create a new account, rewrite the policy, and cancel the existing policy.

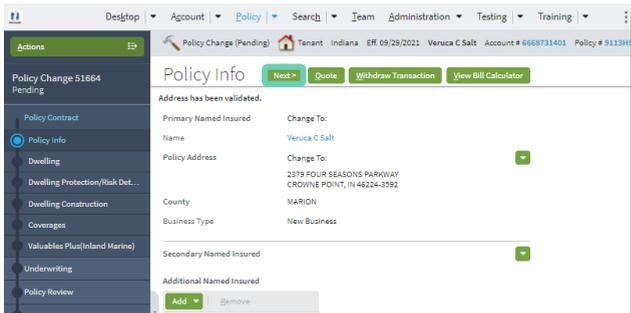
Step 1

Action	Screen
<p>On the <i>Summary</i> screen:</p> <ul style="list-style-type: none"> Click the Actions button. Select “Change Policy” from the drop-down menu. 	

Step 2

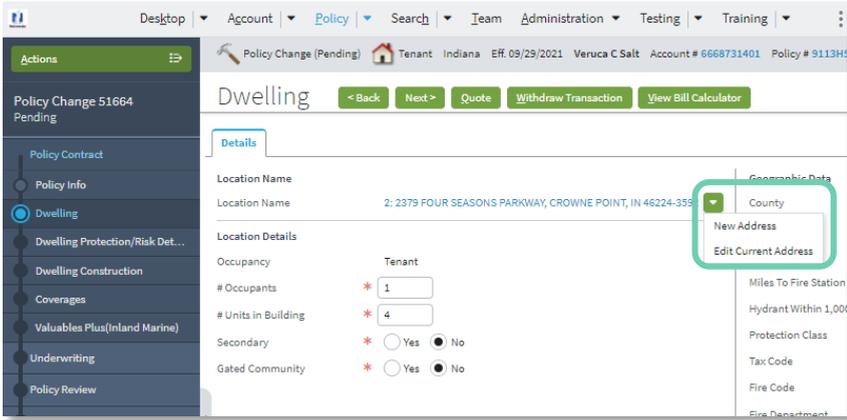
Action	Screen
<p>On the <i>Start Policy Change</i> screen:</p> <ul style="list-style-type: none"> Enter the Effective Date. The Effective Date defaults to today's date but may be changed. Click the Next button. 	

Step 3

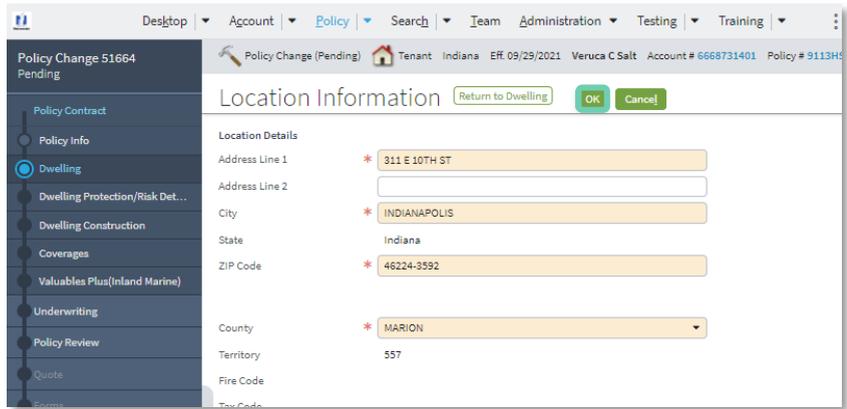
Action	Screen
<p>On the <i>Policy Info</i> screen:</p> <ul style="list-style-type: none"> Click the Next > button. 	

Job Aid Process (Cont.) :

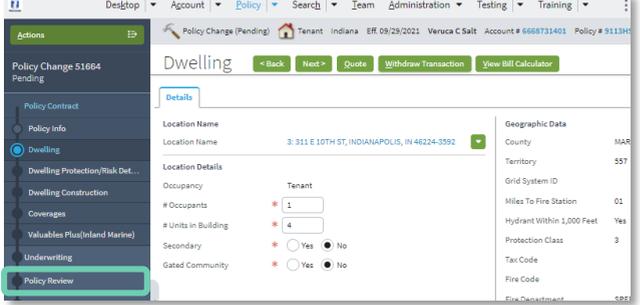
Step 4

Action	Screen
<p>On the <i>Dwelling</i> screen:</p> <ul style="list-style-type: none"> Click the down arrow to the right of the Location Name field. Select one of the following from the drop-down list: <ul style="list-style-type: none"> “New Address” if you wish to enter a new location address. “Edit Current Address” if you wish to modify the current address (such as correcting a street number or a misspelling). <p>Note: The steps are the same regardless of your selection in the drop-down list.</p>	

Step 5

Action	Screen
<p>On the <i>Location Information</i> screen:</p> <ul style="list-style-type: none"> Enter the new location information into the required fields. Click the OK button. <p>Note: PolicyCenter may require you to confirm the policy address.</p>	

Step 6

Action	Screen
<p>On the <i>Dwelling</i> screen, the system updates the address in the Location Name field.</p> <p>If other data is changed, those updates will be reflected in the Geographic Data section.</p> <ul style="list-style-type: none"> Click the Policy Review link 	

Job Aid Process (Cont.) :

Step 7

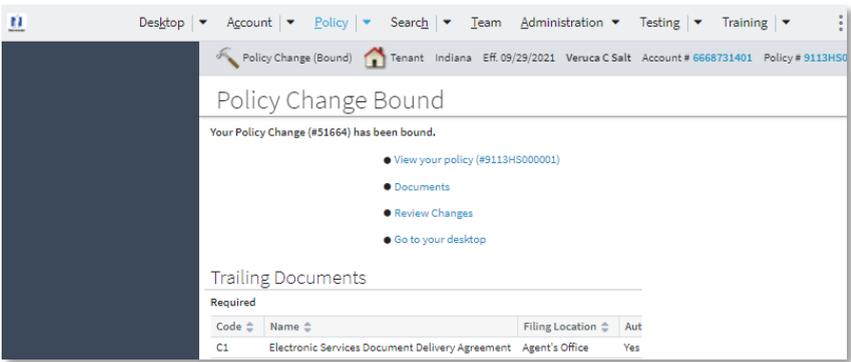
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<p>On the <i>Policy Review</i> screen:</p> <ul style="list-style-type: none"> Click the Quote button. 	<table border="1"> <caption>Comparing Existing Policy and Policy Change: 51664</caption> <thead> <tr> <th>Item</th> <th>Existing Policy</th> <th>Preemptions: Policy Change: 51664</th> </tr> </thead> <tbody> <tr><td>County</td><td>√</td><td>x</td></tr> <tr><td>County Code</td><td>√</td><td>x</td></tr> <tr><td>Dist/Coast</td><td>√</td><td>x</td></tr> <tr><td>Distance to Wildfire Risk Zone</td><td>√</td><td>x</td></tr> <tr><td>Distance to Wildlands</td><td>√</td><td>x</td></tr> <tr><td>EQ Zone</td><td>√</td><td>x</td></tr> <tr><td>FD Subscription</td><td>√</td><td>x</td></tr> </tbody> </table>	Item	Existing Policy	Preemptions: Policy Change: 51664	County	√	x	County Code	√	x	Dist/Coast	√	x	Distance to Wildfire Risk Zone	√	x	Distance to Wildlands	√	x	EQ Zone	√	x	FD Subscription	√	x
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Step 8

Action	Screen																								
<p>On the <i>Quote</i> screen:</p> <ul style="list-style-type: none"> Click the Issue Change button. Click the OK button on the pop-up confirmation window. 	<table border="1"> <caption>Quote Summary</caption> <thead> <tr> <th>Field</th> <th>Value</th> </tr> </thead> <tbody> <tr><td>Policy Number</td><td>9113HS000001</td></tr> <tr><td>Primary Named Insured</td><td>Veruca C Salt</td></tr> <tr><td>Property Address</td><td>311 E 10TH ST, INDIANAPOLIS, IN 46224-3592</td></tr> <tr><td>County</td><td>MARION</td></tr> <tr><td>Policy Period</td><td>08/25/2021</td></tr> <tr><td>Previous Policy Full Term Premium</td><td>\$190.00</td></tr> <tr><td>New Policy Full Term Premium</td><td>\$190.00</td></tr> <tr><td>Full Term Change in Premium</td><td>0</td></tr> </tbody> </table> <p>Property Line - Policy Type Tenant</p> <p>Dwelling at 311 E 10TH ST, INDIANAPOLIS, IN</p> <p>Applied Discounts/Surcharges</p> <p>No Discounts Applied</p> <p>Coverages</p> <table border="1"> <thead> <tr> <th>Section I Coverages</th> <th>Included in Base</th> </tr> </thead> <tbody> <tr> <td>Description</td> <td>Included in Base</td> </tr> <tr> <td>Section I Product/Description</td> <td>All Bases: 500</td> </tr> </tbody> </table>	Field	Value	Policy Number	9113HS000001	Primary Named Insured	Veruca C Salt	Property Address	311 E 10TH ST, INDIANAPOLIS, IN 46224-3592	County	MARION	Policy Period	08/25/2021	Previous Policy Full Term Premium	\$190.00	New Policy Full Term Premium	\$190.00	Full Term Change in Premium	0	Section I Coverages	Included in Base	Description	Included in Base	Section I Product/Description	All Bases: 500
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Job Aid Process (Cont.) :

Step 9

Action	Screen
<p>The policy change has been bound. You can view the entire policy, review the changes to the policy, or return to your desktop from this screen.</p> <p>If any new trailing documents are generated because of the policy change, you must handle them per the current policy.</p>	

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