

Change Dwelling Protection/Risk Details on a Property Policy

PolicyCenter



Description:

This job aid describes how to change the dwelling protection and risk details on a Property policy. In this example, a Condominium policy is used.

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

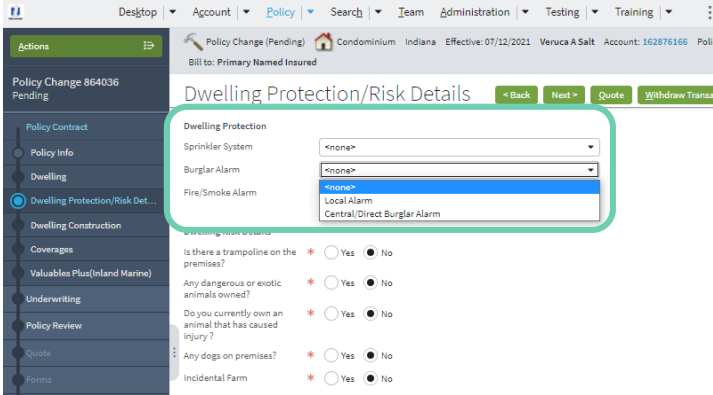
Action	Screen
<p>On the <i>Start Policy Change</i> screen:</p> <ul style="list-style-type: none"> Enter the Effective Date. The Effective Date defaults to today's date but may be changed. Click the Next button. 	

Step 3

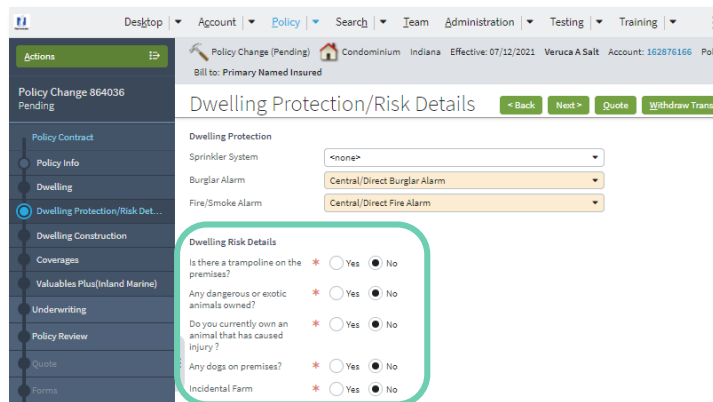
Action	Screen
<p>On the <i>Policy Info</i> screen:</p> <ul style="list-style-type: none"> Click the Dwelling Protection/Risk Details link. 	

Job Aid Process (Cont.) :

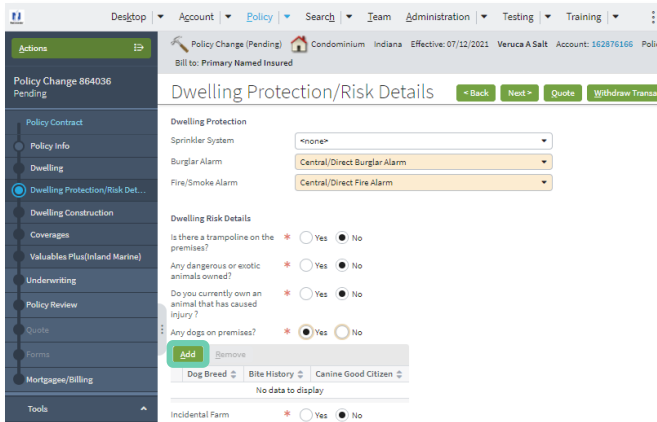
Step 4

Action	Screen
<p>On the <i>Dwelling Protection/Risk Details</i> screen:</p> <ul style="list-style-type: none"> Use the drop-down lists to set Dwelling Protection specifications for: <ul style="list-style-type: none"> Sprinkler System Burglar Alarm Fire/Smoke Alarm <p>Note: Specifications vary for each drop-list list.</p>	

Step 5

Action	Screen
<p>On the <i>Dwelling Protection/Risk Details</i> screen:</p> <ul style="list-style-type: none"> Select the needed radio buttons for Yes or No for each Dwelling Risk Details question. <p>Note: This example will add a dog to the member's policy.</p> <ul style="list-style-type: none"> Select Yes to the right of the Any dogs on premises? question. 	

Step 6

Action	Screen
<p>On the <i>Dwelling Protection/Risk Details</i> screen:</p> <ul style="list-style-type: none"> Click the Add button in the new section that displays under the Any dogs on premises? question. 	

Job Aid Process (Cont.) :

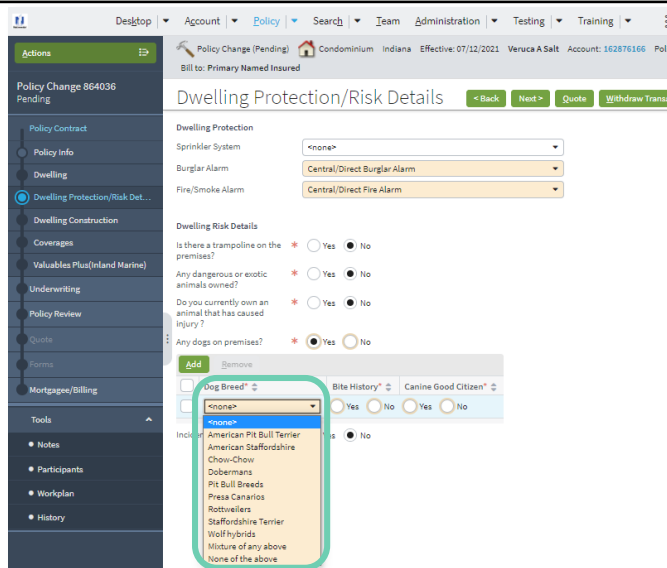
Step 7

Action

On the *Dwelling Protection/Risk Details* screen:

- Click the **Dog Breed** drop-down menu and select the applicable entry from the **Dog Breed** drop-down list.

Screen



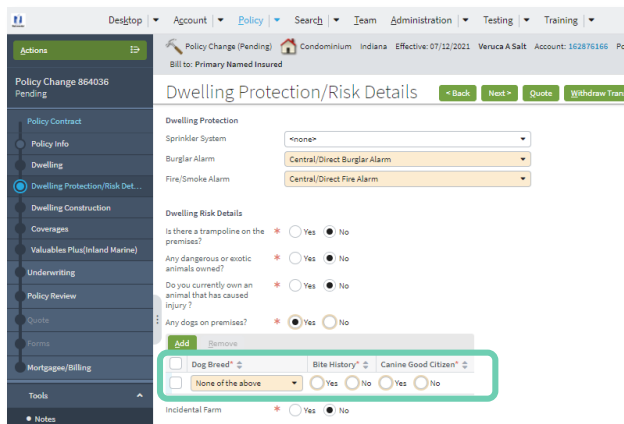
Step 8

Action

On the *Dwelling Protection/Risk Details* screen:

- Select the needed radio buttons for **Yes** or **No** for the **Bite History** and **Canine Good Citizen** questions.

Screen



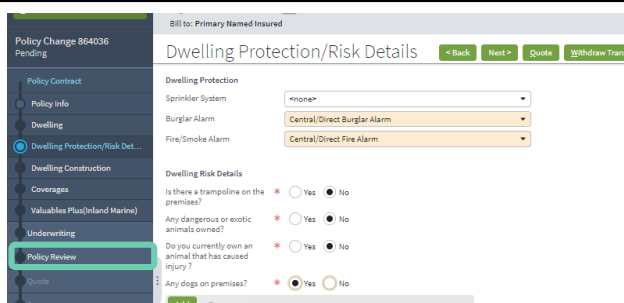
Step 9

Action

On the *Dwelling Protection/Risk Details* screen:

- Click the **Policy Review** link.

Screen



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Job Aid Process (Cont.) :

Step 10

Action

On the *Policy Review* screen:

- Click the **Quote** button.

Screen

Step 11

Action

On the *Quote* screen:

- Click the **Issue Change** button.
- Click the **OK** button on the pop-up confirmation window.

Screen

Step 12

Action

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.

If any new trailing documents are generated because of the policy change, you must handle them per the current policy.

Screen

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