

Review and Compare Policy Transactions



Description

This job aid describes how to view Policy Transaction history on a policy, and review specific changes made within each transaction. This job aid also includes steps for comparing two Policy Transactions.

Review Policy Transactions

Step 1

Action	Screen
<p>On the Summary screen:</p> <ul style="list-style-type: none"> Select History from the Actions menu on the left. 	<p>The screenshot shows the 'Summary' screen for a policy. On the left, there is a navigation menu with 'History' highlighted in green. The main content area displays 'Current Activities' and 'Completed Policy Transactions' tables. The 'Completed Policy Transactions' table has columns for Period Eff Date, Trans Eff Date, Trans Close Date, Type, Transaction #, Premium, and Total Cost. The 'History' link in the left menu is highlighted with a green box.</p>

Step 2

Action	Screen
<p>On the <i>History</i> screen, review the Policy Transactions on the policy:</p> <ul style="list-style-type: none"> Select the Policy Transaction # link to view the changes specific to that transaction. <p>Note: The User column has the name of the user who initiated the Policy Transaction.</p>	<p>The screenshot shows the 'History' screen for a policy. It includes a search bar, a 'Select User...' button, and a dropdown menu for 'Related To'. Below these are 'Search' and 'Reset' buttons. The main table has columns for Type, User, Event Timestamp, Effective Date, Description, and Policy Transaction. The 'User' column is highlighted in green. The table contains several rows of transaction data, including renewals and policy changes.</p>

Step 3

Action	Screen
<p>The <i>Quote</i> screen displays the selected Policy Transaction.</p> <p>To view more detailed information, go to the <i>Policy Review</i> screen.</p> <ul style="list-style-type: none"> Select Policy Review from the Actions menu on the left. 	

Step 4

Action	Screen																																				
<p>On the <i>Policy Review</i> screen, you can review the differences by comparing the information in the Existing Policy and Policy Change columns.</p> <p>It may be necessary to scroll down to view all the changes made on the policy.</p> <p>Note: This screen displays different information depending on the policy type.</p>	<table border="1"> <thead> <tr> <th>Item</th> <th>Existing Policy</th> <th>Policy Change: 508016</th> </tr> </thead> <tbody> <tr> <td>Policy Info</td> <td></td> <td></td> </tr> <tr> <td>Primary Named Insured: Maria Toledo</td> <td></td> <td></td> </tr> <tr> <td>Marital Status</td> <td>Single</td> <td>Married</td> </tr> <tr> <td>SmartRide Texting No</td> <td></td> <td></td> </tr> <tr> <td>SmartRide Text Notification</td> <td>Yes</td> <td>No</td> </tr> <tr> <td>Drivers</td> <td></td> <td></td> </tr> <tr> <td>Driver: Maria Toledo</td> <td></td> <td></td> </tr> <tr> <td>Marital Status</td> <td>Single</td> <td>Married</td> </tr> <tr> <td>Driver: Victor Salt</td> <td></td> <td>√</td> </tr> <tr> <td>SmartRide</td> <td></td> <td></td> </tr> <tr> <td>SmartRide</td> <td></td> <td>√</td> </tr> </tbody> </table>	Item	Existing Policy	Policy Change: 508016	Policy Info			Primary Named Insured: Maria Toledo			Marital Status	Single	Married	SmartRide Texting No			SmartRide Text Notification	Yes	No	Drivers			Driver: Maria Toledo			Marital Status	Single	Married	Driver: Victor Salt		√	SmartRide			SmartRide		√
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Compare Policy Transactions

Step 1

Action	Screen
<p>From the <i>Policy Transactions</i> screen, you can compare two transactions.</p> <p>You can review Policy Transaction details by clicking the arrow button to the left of the Type column.</p> <ul style="list-style-type: none"> Select the checkbox to the left of the two Policy Transactions you would like to compare. In this example, select the checkboxes to the left of the Policy Change and Reinstatement Work Orders. Select the Compare button. 	

Step 2

Action	Screen
<p>The <i>Differences Between Pending Policy Transactions</i> screen displays the difference between the two Policy Transactions.</p> <ul style="list-style-type: none"> Click the arrow to the left of Vehicles to see the detailed differences. <p>In this example, the Policy Change affected the premium amount.</p> <p>Note: An “x” indicates the line item has been removed from the policy. A check mark indicates the line item has been added to the policy. (Not shown in this example.)</p> <ul style="list-style-type: none"> Click the Return to Policy Transactions link to return to the <i>Policy Transactions</i> screen, where you can compare additional Policy Transactions, if desired. 	

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