

Property Proof of Insurance (POI) Availability Pre-Bind PolicyCenter



This step-by-step job aid demonstrates the functionality enabled for you to print an application and declaration for policies that includes the policy number *before* the final issuance of the policy.

The Policy# and Declaration will generate pre-bind, but only if both the effective date and the purchase date for a property policy are both future dated.

The documents and policy number will generate when you click the Finalize Quote button. With this change, an effective date can be changed without a change in Policy Number by allowing you to edit the policy, but only before final issuance.



After a policy is fully issued, the effective date can **ONLY** be changed by contacting PLPC.

Step 1

Action

The submission is in "Quoted" status on the Quote screen

Click the **Finalize Quote** button.

Screen

Step 2

Action

A pop-up message displays.

Click the **OK** button.

Screen

Property Proof of Insurance (POI) Availability Pre-Bind



Step 3

Action

A message displays on the Payment screen. The policy has not been issued at this point.

The Policy# and Declaration will only generate pre-bind if both the effective date and the purchase date for the property are both future dated.

Screen

Step 4

Action

On the Payment screen:

Click the **Documents** link in the Tools section.

Screen

Step 5

Action

On the Documents screen:

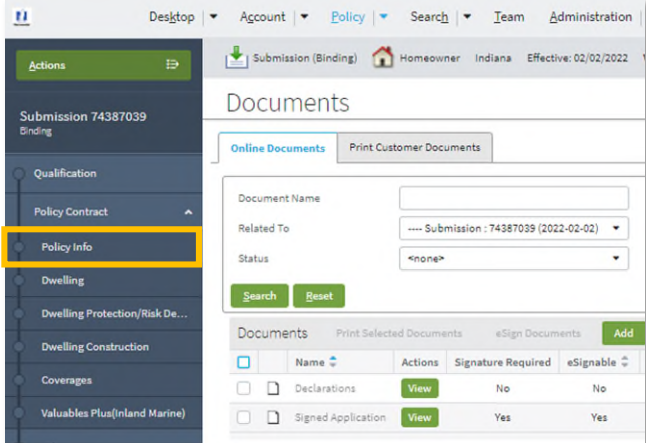
Click the **View** button for the Declarations.

Depending on your internet browser settings, the Declaration may open in a separate browser tab or as a separate download.

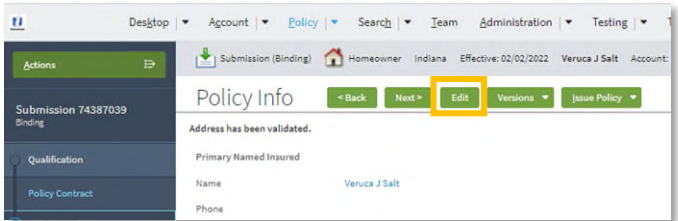
Screen

Property Proof of Insurance (POI) Availability Pre-Bind

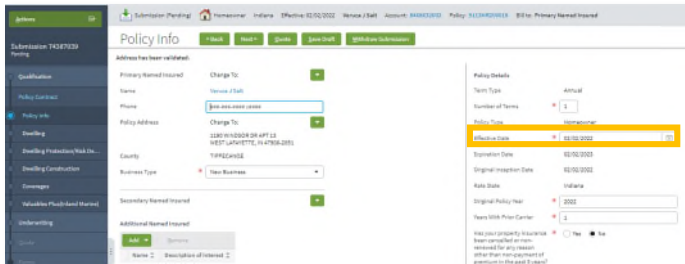
Step 6

Action	Screen
<p>If the closing date of the property changes, you can change the Effective Date and Purchase Date of the policy by editing the submission.</p> <p>Click the Policy Info link in the Left Navigation bar.</p>	

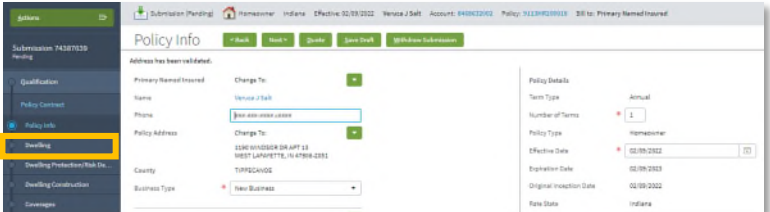
Step 7

Action	Screen
<p>On the <i>Policy Info</i> screen:</p> <p>Click the Edit button.</p>	

Step 8

Action	Screen
<p>Change the date in the Effective Date field.</p>	

Step 9

Action	Screen
<p>Click the Dwelling link in the Left Navigation bar.</p>	

Property Proof of Insurance (POI) Availability Pre-Bind

Step 10

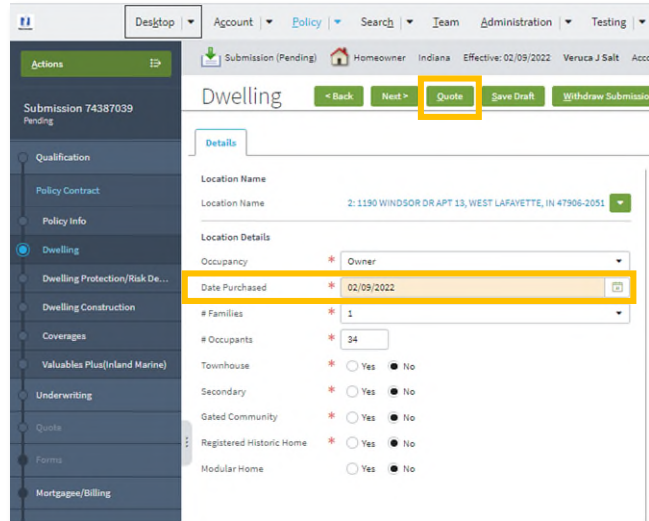
Action

On the Dwelling screen:

Change the date in the **Date Purchased** field to match the new **Effective Date**.

Click the **Quote** button.

Screen



Step 11

Action

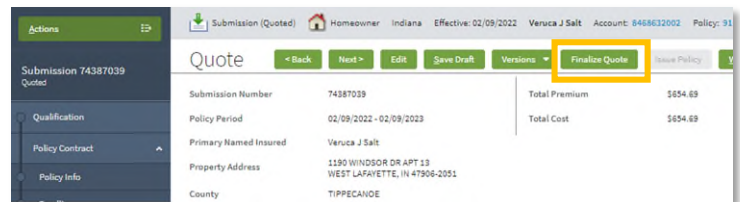
On the Quote screen:



The submission is in "Quoted" status.

Click the **Finalize Quote** button.

Screen



Step 12

Action

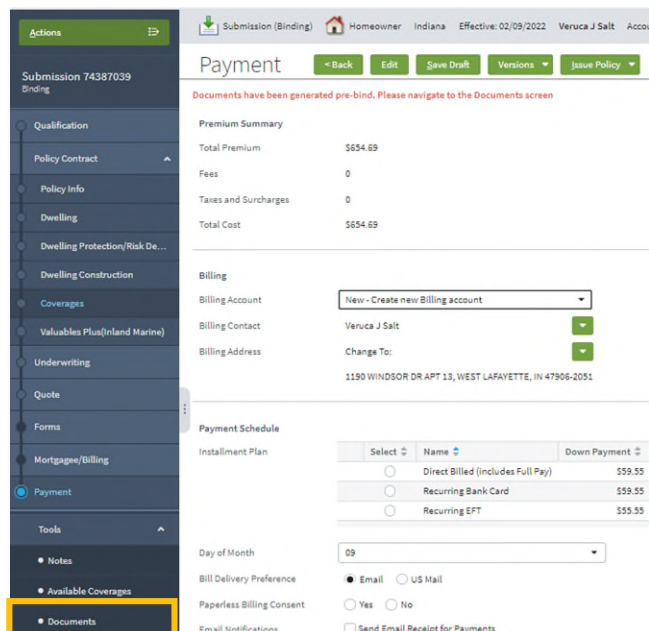
A message displays on the Payment screen. The policy has not been issued at this point.



The submission is in "Binding" status.

Click the **Documents** link in the Tools section.

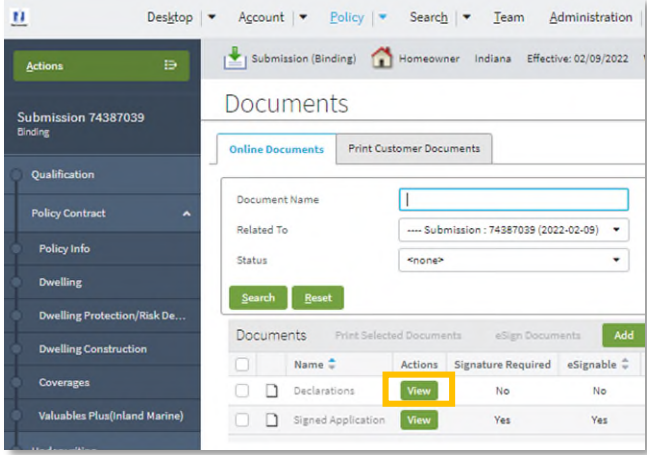
Screen



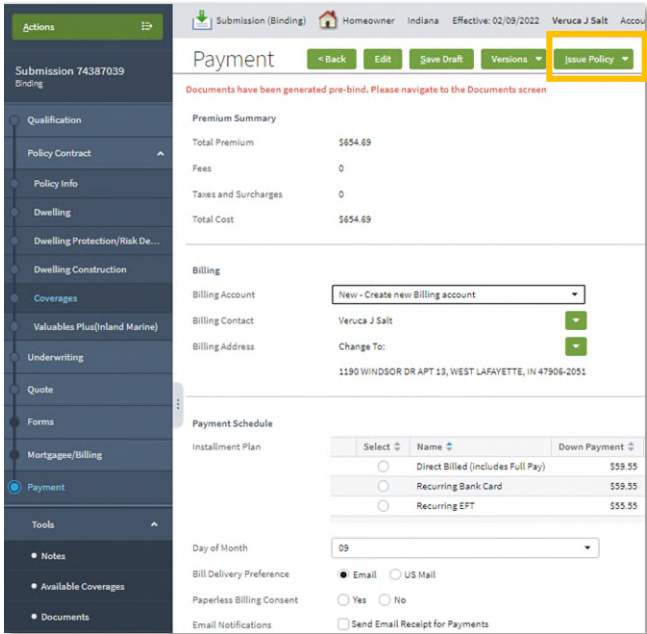
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Step 13

Action	Screen
<p>On the Documents screen:</p> <p>Click the View button for the Declarations.</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>! Depending on your internet browser settings, the Declaration may open in a separate browser tab or as a separate download</p> </div>	

Step 14

Action	Screen
<div style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> <p>! Be sure to set yourself a reminder to reach out to customer and confirm they closed on house!</p> </div> <p>When ready:</p> <p>Return to the Payment screen.</p> <p>Bind and Issue Policy.</p> <p>Collect the down payment for the policy.</p>	

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