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	Screen			
The submission is in "Quoted" status on the Quote screen Click the Finalize Quote button.	Deglog Account Estry Search Testing Training Live Chat for Agents Testing Training Live Chat for Agents Testing Training Live Chat for Agents Testing Testing Training Live Chat for Agents Testing Testing Testing Test			





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.

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	Submission (Binding)	Anneowner Indiana Effective 02/02/2022 Verwaa 3 Salt Account: 8466622002 Policy: 911314R203018 821 ta: Primary Named Insure
Submission 74187030	Payment	<back *="" *<="" dait="" edit="" jame="" jaw="" policy="" td="" versions=""></back>
Binding	Documents have been general	ted pre-bind. Please navigate to the Documents screen
	Premium Summary	
	Total Premium	1054,03
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	Taves and Surcharges	0

Screen

Step 4

Action	Screen
On the Payment screen:	11 Desigtop + Account + Estroy + Search + Team Administration + Testing + Training + Live Chart for Account in the search in
Click the Documents link in the roois section.	Submitted r4387333 Qualification Presentent hore two propried pre kMd. Please sergistic this Documents series Presentent hore two propried pre kMd. Please sergistic this Documents series Presentent hore two propried pre kMd. Please sergistic this Documents series Presentent hore two propried pre kMd. Please sergistic this Documents series Presentent hore two propried pre kMd. Please sergistic this Documents series Presentent hore two propried pre kMd. Please sergistic this Documents series Presentent hore two propried pre kMd. Please sergistic this Documents series Presentent hore two propried pre kMd. Please sergistic this Documents series Presentent hore two propried pre kMd. Please sergistic this Documents series Presentent hore two propried pre kMd. Please sergistic this Documents series Presentent hore two propried pre kMd. Please sergistic this Documents series Presentent free free free presentent hore two propried pre kMd. Please sergistic this Documents series Presentent free free free presentent

Step 5 Action Screen On the Documents screen: Agcount - Policy - Search - Team Administration n Desktop -Submission (Binding) 🚮 Homeowner Indiana Effective: 02/02/2022 Click the View button for the Declarations. Documents Submission 74387039 Online Documents Print Customer Documents Depending on your internet Document Name browser settings, the Related To ----- Submission : 74387039 (2022-02-02) 🔻 Declaration may open in a Status <none> . separate browser tab or as a Search Reset separate download. Documents Print Sel A Name 韋 Actions Signature Required eSignable 🌻 Declarations View No No Valuables Plus(Inland Marine) Signed Application View Yes Yes



Step 6

Olep 0	
Action	Screen
If the closing date of the property changes, you can change the Effective Date and Purchase Date of the policy by editing the submission.	Desktop ▼ Agcount ▼ Policy ▼ Search ▼ Ieam Administration Actions I⇒ I⇒ I⇒ I⇒ I⇒ I⇒ Homeowner Indiana Effective: 02/02/2022 I Cubering Documents I⇒ I⇒
Click the Policy Info link in the Left Navigation bar.	Online Documents Print Customer Documents Qualification Document Name Policy Info Document Name Dwelling Online Documents Dwelling Potection/Risk De Dwelling Construction Reset Documents Print Selected Documents Actions Signature Required Valuables Plus(Inland Marine) Signed Application
Step 7	
	Oarraan

Screen	
Desktop • Agcount • Bolicy • Ieam Administration • Testing • 1	
Actions ED Submission (Binding) 🟠 Homeowner Indiana Effective: 02/02/2022 Veruca J Salt Account:	
Submission 74387039 Policy Info <back next=""> Edit Versions * Jasue Policy *</back>	
Binding Address has been validated.	
Qualification Primary Named Insured	
Policy Contract Name Veruca J Salt	
Phone	
	Screen

Step 8

Action	Scre	een
Change the date in the Effective Date field.	browner b	Access 18.000.00 May 20.000.000.00 Mile Analysis Access Ac

Step 9

Action	Screen
Click the Dwelling link in the Left Navigation bar.	State Description Processor Index State Description Description



Step 10		
Action	Screen	
On the Dwelling screen: Change the date in the Date Purchased field to match the new Effective Date . Click the Quote button.	Image: Contraction Desktop Account Eolicy Search Image: I	
	Mortgaget/Billing	
Step 11		
Action	Screen	
Click the Finalize Quote button.	Actions ED Submission (Quoted) Momeowner Indiana Effective: 02/09/2022 Varuea J Salt Account: 8468/32002 Policy: 91 Submission 74387039 Quote Reads Redo Edit Save Draft Version: • Finalize Quole Reade Y Submission 74387039 Submission 74387039 Submission Number 74387039 Total Premium \$454.69 Qualification Policy Period 02/09/2022 02/09/2023 Total Cost \$454.69 Policy Contract Primary Hamed Insured Versica J Salt Primary Hamed Insured Versica J Salt Policy Info Country THE COLOR UNINDSO DR APT 13 VEST CAPARETTE (N. 47504-2051)	
Step 12		
Action	Screen	
A message displays on the Payment screen. The policy has not been issued at this point.	Actions Image: Submission (Binding) Image: Homeowner Indiana Effective: (02/03/2022) Veruca J Salt Account of the submission (Binding) Submission 74337039 Payment Back Eddt Submission 74337039 Documents have been generated pre-bind. Please navigate to the Documents screen June Policy Documents have been generated pre-bind. Please navigate to the Documents screen Documents have been generated pre-bind. Please navigate to the Documents screen Documents have been generated pre-bind. Please navigate to the Documents screen 	
The submission is in "Binding" status.	Qualification Premium Summary Policy Contract. Total Fremium \$554.69 Policy Info Fees 0 Develling Taxes and Surcharges 0 Develling Total Cost \$654.69	
Click the Documents link in the Tools section.	Develling Construction Billing Coverages Billing Account Valuables Plus(Inland Marine) Billing Contact Valuables Plus(Inland Marine) Billing Contact Valuables Plus(Inland Marine) Billing Contact Valuables Plus(Inland Marine) Billing Adress Change To: Image: State of the state of	

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Step	13	
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
		Image: Design P Agcount Policy Info Image: Policy Poli
Step	14	
Action		Screen
	Be sure to set yourself a reminder to reach out to customer and confirm they closed on house!	Actions ED Submission (Binding) Homeowner Indiana Effective: 02 (09/2022 Veruce J Sait Accou Submission 74387039 Payment Back Edit Save Policy Isave Policy Isave Policy Qualification Premium Sate Same Documents screen Policy Contract Total Premium S654.69
When	ready:	Policy Info Taxes and Surcharges 0 Dwelling Total Cost \$654.69
Returi Bind a	n to the Payment screen. Ind Issue Policy .	Owelling Protection VRAK UP Billing Owelling Construction Billing Account Coverages Billing Account Valuables Plus(Inland Marine) Billing Contact Underwriting Billing Address Charge To: 1190 WINDSOR DR APT 19, WEST LAFAYETTE, IN 47506-2051
Collec	t the down payment for the policy.	Forms Payment Schedule Mortgagee/Billing Installment Plan © Payment Down Payment © @ Payment Direct Billed (includes Full Pay) Tools Recurring EArk Card
		Notes Day of Month O9 O Available Coverages Available Coverages Paperless Billing Consent Ves No Documents Email Notifications Send Email Receipt for Payments

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