

# 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

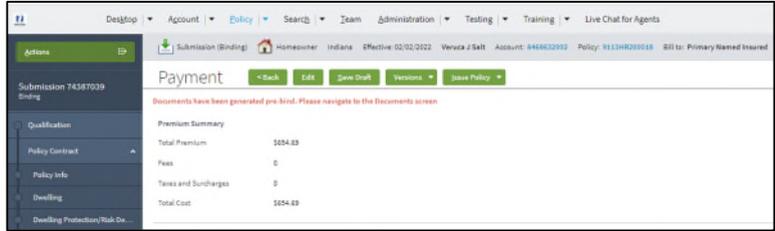
Action	Screen
<p>The submission is in "Quoted" status on the Quote screen</p> <p>Click the <b>Finalize Quote</b> button.</p>	

## Step 2

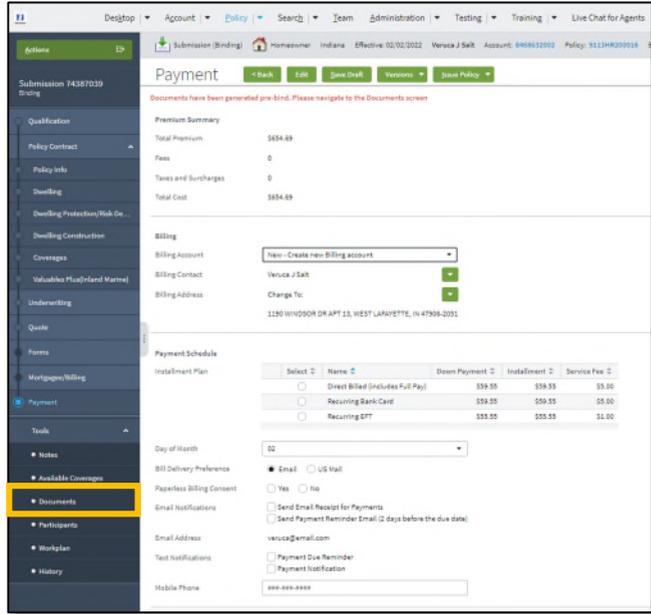
Action	Screen
<p>A pop-up message displays.</p> <p>Click the <b>OK</b> button.</p>	

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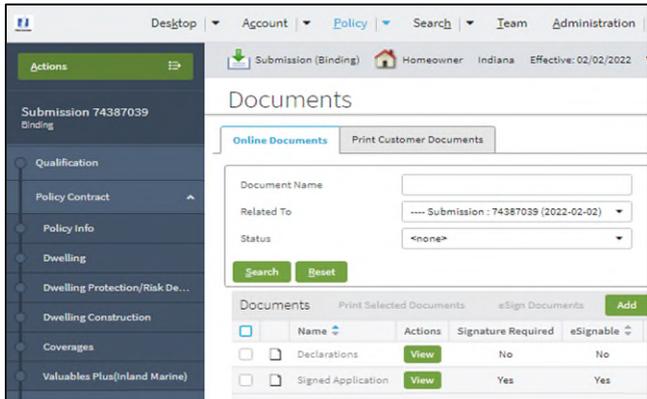
## Step 3

Action	Screen										
<p>A message displays on the Payment screen. The policy has not been issued at this point.</p> <div style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <p>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.</p> </div>	 <table border="1" data-bbox="843 474 1094 569"> <thead> <tr> <th colspan="2">Premium Summary</th> </tr> </thead> <tbody> <tr> <td>Total Premium</td> <td>\$654.89</td> </tr> <tr> <td>Fees</td> <td>0</td> </tr> <tr> <td>Taxes and Surcharges</td> <td>0</td> </tr> <tr> <td>Total Cost</td> <td>\$654.89</td> </tr> </tbody> </table>	Premium Summary		Total Premium	\$654.89	Fees	0	Taxes and Surcharges	0	Total Cost	\$654.89
Premium Summary											
Total Premium	\$654.89										
Fees	0										
Taxes and Surcharges	0										
Total Cost	\$654.89										

## Step 4

Action	Screen
<p>On the Payment screen:</p> <p>Click the <b>Documents</b> link in the Tools section.</p>	

## Step 5

Action	Screen															
<p>On the Documents screen:</p> <p>Click the <b>View</b> button for the Declarations.</p> <div style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <p>Depending on your internet browser settings, the Declaration may open in a separate browser tab or as a separate download.</p> </div>	 <table border="1" data-bbox="940 1881 1349 1986"> <thead> <tr> <th></th> <th>Name</th> <th>Actions</th> <th>Signature Required</th> <th>eSignable</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>Declarations</td> <td><a href="#">View</a></td> <td>No</td> <td>No</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Signed Application</td> <td><a href="#">View</a></td> <td>Yes</td> <td>Yes</td> </tr> </tbody> </table>		Name	Actions	Signature Required	eSignable	<input type="checkbox"/>	Declarations	<a href="#">View</a>	No	No	<input type="checkbox"/>	Signed Application	<a href="#">View</a>	Yes	Yes
	Name	Actions	Signature Required	eSignable												
<input type="checkbox"/>	Declarations	<a href="#">View</a>	No	No												
<input type="checkbox"/>	Signed Application	<a href="#">View</a>	Yes	Yes												

## 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 <b>Policy Info</b> link in the Left Navigation bar.</p>	

## Step 7

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

## Step 8

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

## Step 9

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

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## Step 10

Action	Screen
<p>On the Dwelling screen:</p> <p>Change the date in the <b>Date Purchased</b> field to match the new <b>Effective Date</b>.</p> <p>Click the <b>Quote</b> button.</p>	

## Step 11

Action	Screen
<p>On the Quote screen:</p> <div style="border: 1px solid black; padding: 5px; display: inline-block;">  The submission is in "Quoted" status.         </div> <p>Click the <b>Finalize Quote</b> button.</p>	

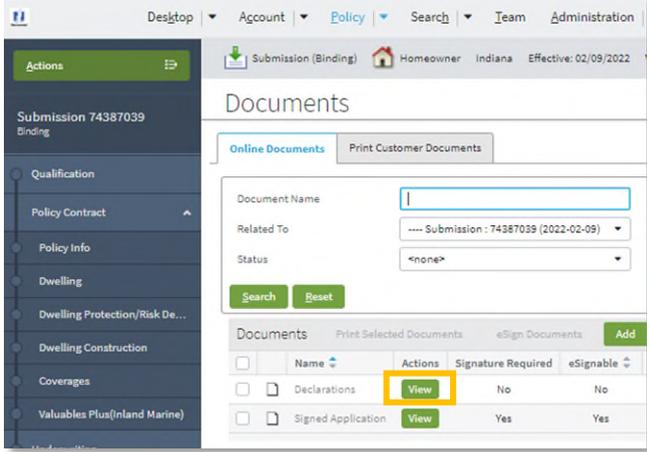
## Step 12

Action	Screen
<p>A message displays on the Payment screen. The policy has not been issued at this point.</p> <div style="border: 1px solid black; padding: 5px; display: inline-block;">  The submission is in "Binding" status.         </div> <p>Click the <b>Documents</b> link in the Tools section.</p>	

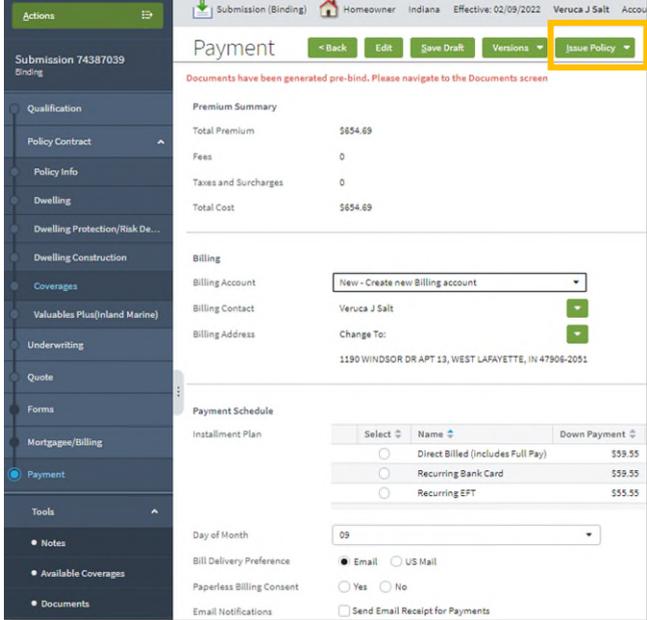
# Property Proof of Insurance (POI) Availability Pre-Bind



## Step 13

Action	Screen
<p>On the Documents screen:</p> <p>Click the <b>View</b> button for the Declarations.</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p><b>!</b> 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><b>!</b> 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 <b>Payment</b> screen.</p> <p>Bind and <b>Issue Policy</b>.</p> <p>Collect the down payment for the policy.</p>	

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