

## Cancel Policy – Policyholder Request

### In Brief

In this Quick Card, you will cancel a policy at the policyholder's request. In this example, you will cancel an Property policy.

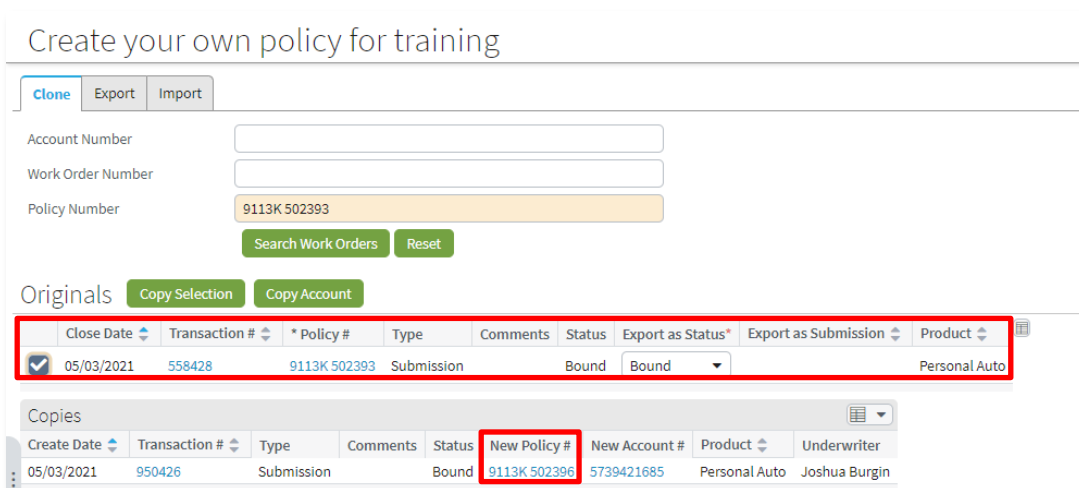
Log in to the [VTO](#) using the appropriate generic user account from the **VTO Information Guide** document.

### Quick Card

**IMPORTANT:** This is a test environment. The next seven (7) steps are ONLY used in the VTO.

### Clone the Policy

1. Click the down arrow to the right of the **Training** button on the **Tab Bar**. Select "**Create your own policy for training**" from the drop-down menu.
2. Enter "**9113K 502393**" in the **Policy Number** field exactly as it is shown.
3. Click the **Search Work Orders** button.
4. In the *Originals* section, click the checkbox to the left of the **Submission** Policy Transaction Type for the policy being cloned. In this example, select the checkbox to the left of Transaction # **558428**.



Create your own policy for training

Clone Export Import

Account Number

Work Order Number

Policy Number 9113K 502393

Search Work Orders Reset

Originals Copy Selection Copy Account

	Close Date	Transaction #	* Policy #	Type	Comments	Status	Export as Status	Export as Submission	Product
<input checked="" type="checkbox"/>	05/03/2021	558428	9113K 502393	Submission		Bound	Bound		Personal Auto

Copies

	Create Date	Transaction #	Type	Comments	Status	New Policy #	New Account #	Product	Underwriter
	05/03/2021	950426	Submission		Bound	9113K 502396	5739421685	Personal Auto	Joshua Burgin

5. Click the **Copy Selection** button.  
**Note:** If the *Copies* section does not automatically populate, click on the **Search** tab, then back on the **Training** tab. The clone information should be visible.
6. Scroll down, if necessary, to the *Copies* section.
7. Click the link in the **New Policy #** column.

**IMPORTANT:** This is a test environment. This data is not valid. The VTO is not connected to the rating system, but in production, you will see the correct premium.



### Summary screen

8. Click the **Actions** button.
9. Select “**Cancel Policy**” from the drop-down menu.

### Start Cancellation For Policy # screen

10. Select “**Insured**” from the **Source** field drop-down list.
11. Select “**Request**” from the **Reason** field drop-down list.
12. Enter “*Policyholder cancelling policy.*” into the **Reason Description** field.
13. Enter the first day of next month in the **Cancellation Effective Date** field.
14. Click the **Start Cancellation** button.

### Confirmation screen

15. Click the **Cancel Options** button.
16. Select “**Schedule Cancellation**” from the drop-down list.
17. Click the **OK** button.

### Cancellation Bound screen

The system displays the message “*Your cancellation (#XXXXX) has been bound.*”