

Change Dwelling Protection/Risk Details on a Property Policy

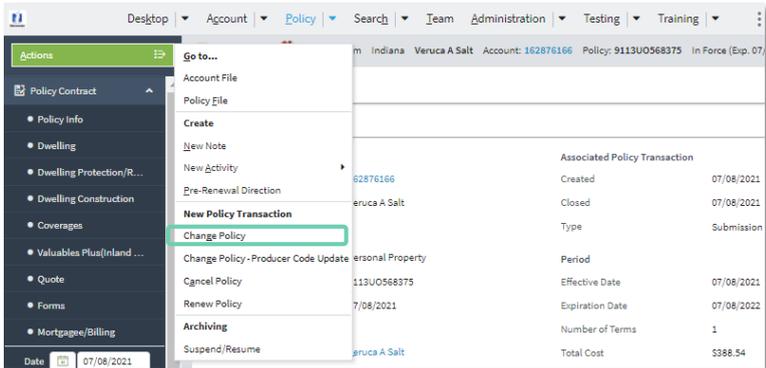
PolicyCenter



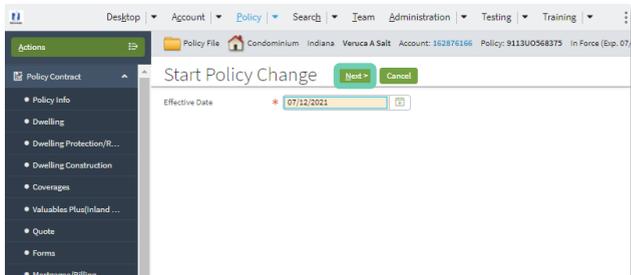
Description:

This job aid describes how to change the dwelling protection and risk details on a Property policy. In this example, a Condominium policy is used.

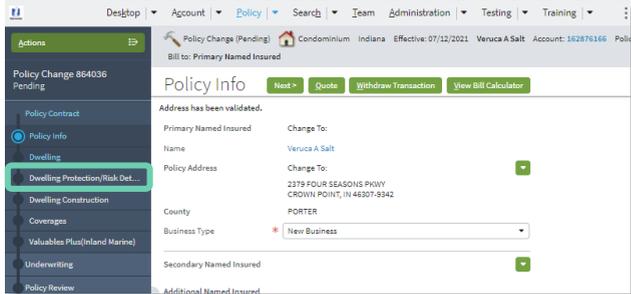
Step 1

Action	Screen
<p>On the <i>Summary</i> screen:</p> <ul style="list-style-type: none"> Click the Actions button. Select “Change Policy” from the drop-down menu. 	

Step 2

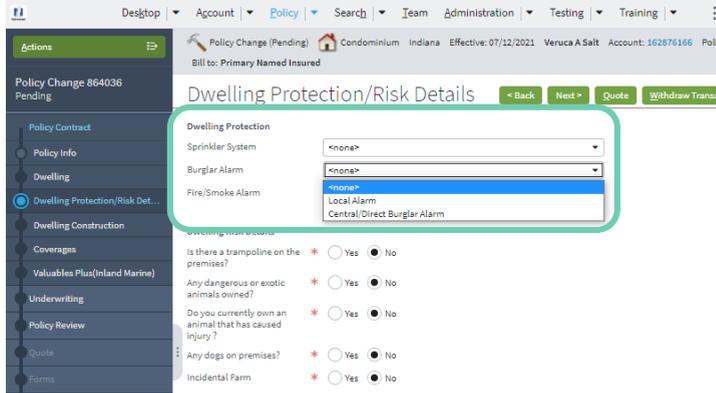
Action	Screen
<p>On the <i>Start Policy Change</i> screen:</p> <ul style="list-style-type: none"> Enter the Effective Date. The Effective Date defaults to today’s date but may be changed. Click the Next button. 	

Step 3

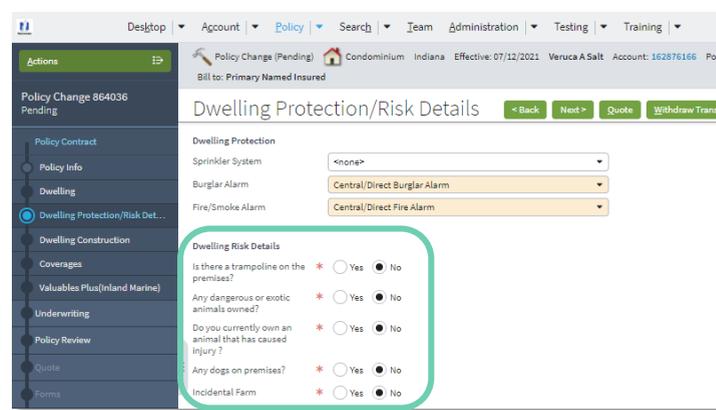
Action	Screen
<p>On the <i>Policy Info</i> screen:</p> <ul style="list-style-type: none"> Click the Dwelling Protection/Risk Details link. 	

Job Aid Process (Cont.) :

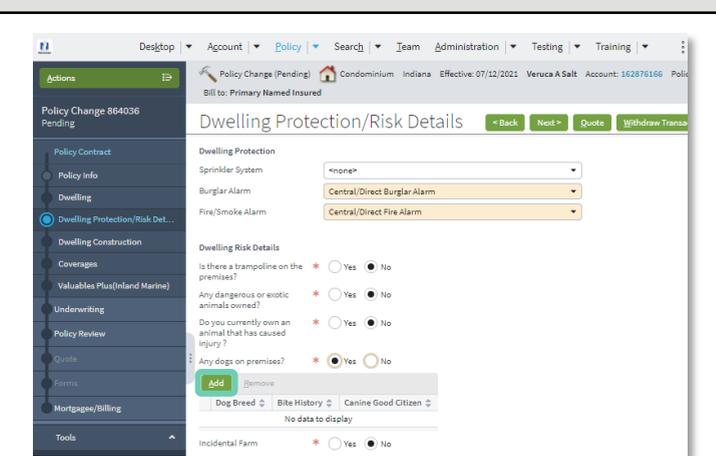
Step 4

Action	Screen
<p>On the <i>Dwelling Protection/Risk Details</i> screen:</p> <ul style="list-style-type: none"> Use the drop-down lists to set Dwelling Protection specifications for: <ul style="list-style-type: none"> Sprinkler System Burglar Alarm Fire/Smoke Alarm <p>Note: Specifications vary for each drop-list list.</p>	

Step 5

Action	Screen
<p>On the <i>Dwelling Protection/Risk Details</i> screen:</p> <ul style="list-style-type: none"> Select the needed radio buttons for Yes or No for each Dwelling Risk Details question. <p>Note: This example will add a dog to the member's policy.</p> <ul style="list-style-type: none"> Select Yes to the right of the Any dogs on premises? question. 	

Step 6

Action	Screen
<p>On the <i>Dwelling Protection/Risk Details</i> screen:</p> <ul style="list-style-type: none"> Click the Add button in the new section that displays under the Any dogs on premises? question. 	

Job Aid Process (Cont.) :

Step 7

Action	Screen
<p>On the <i>Dwelling Protection/Risk Details</i> screen:</p> <ul style="list-style-type: none"> Click the Dog Breed drop-down menu and select the applicable entry from the Dog Breed drop-down list. 	

Step 8

Action	Screen
<p>On the <i>Dwelling Protection/Risk Details</i> screen:</p> <ul style="list-style-type: none"> Select the needed radio buttons for Yes or No for the Bite History and Canine Good Citizen questions. 	

Step 9

Action	Screen
<p>On the <i>Dwelling Protection/Risk Details</i> screen:</p> <ul style="list-style-type: none"> Click the Policy Review link. 	

Job Aid Process (Cont.) :

Step 10

Action	Screen
<p>On the <i>Policy Review</i> screen:</p> <ul style="list-style-type: none"> Click the Quote button. 	

Step 11

Action	Screen
<p>On the <i>Quote</i> screen:</p> <ul style="list-style-type: none"> Click the Issue Change button. Click the OK button on the pop-up confirmation window. 	

Step 12

Action	Screen
<p>The policy change has been bound. You can view the entire policy, review the changes to the policy, or return to your desktop from this screen.</p> <p>If any new trailing documents are generated because of the policy change, you must handle them per the current policy.</p>	

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