

## Edit an Auto Submission

### In Brief

In PolicyCenter after quoting, but before issuing a policy, you can edit the Work Order.

In this Quick Card, you will edit the pending Auto submission for the potential policyholder. After quoting, something comes up and **the policyholder** must call you back. After 30 minutes, **the policyholder** calls back and wants to make additional edits to the submission. You will edit the Work Order and re-quote the policy.

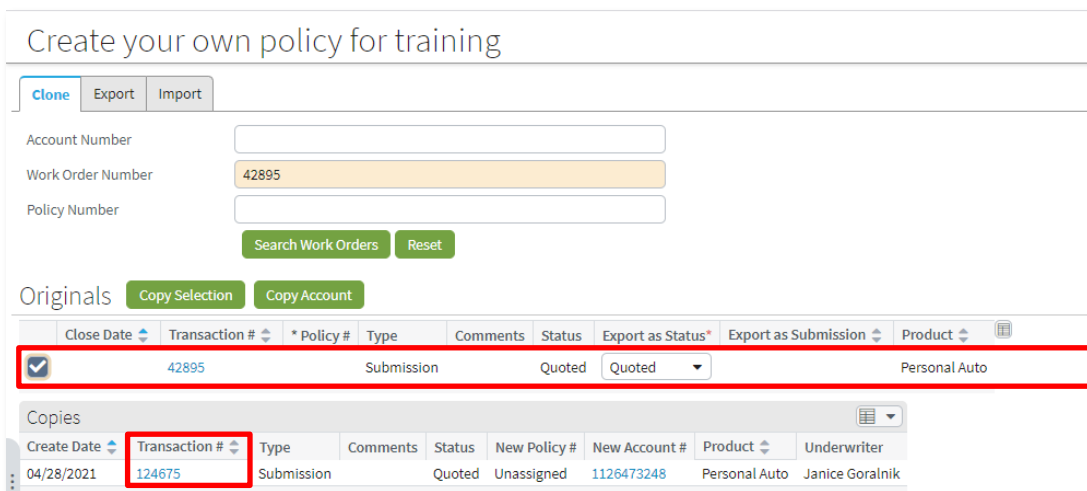
Log in to the [VTO](#) using the appropriate generic user account from the **VTO Information Guide** document.

### 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 **"42895"** in the **Work Order Number** field exactly as it is shown, including spaces and capital letters.
3. Click the **Search Work Orders** button.
4. In the *Originals* section, click the checkbox to the left of the **Submission** Transaction Type for the policy being cloned. In this example, select the checkbox to the left of Work Order # **124675**.



Create your own policy for training

Clone Export Import

Account Number

Work Order Number

Policy Number

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"/>	42895		Submission		Quoted	Quoted		Personal Auto

Copies

Create Date	Transaction #	Type	Comments	Status	New Policy #	New Account #	Product	Underwriter
04/28/2021	124675	Submission		Quoted	Unassigned	1126473248	Personal Auto	Janice Goralnik



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. On the *Create your own policy for training* screen, scroll down, if necessary, to the *Copies* section.
7. Click the link in the **Work Order #** column under the *Copies* section.

**IMPORTANT:** PolicyCenter automatically created a **New Account #**. The new account is linked to the *cloned* policy, not the original.

#### Quote screen

8. Click the **Edit** button.
9. Click the **OK** button.

**NOTE:** PolicyCenter may display the message “*All reports were not returned. Quoted premium may change.*” This is normal and will disappear once you bind the policy.

#### Coverages screen

10. In the *Vehicle Level Coverages* section, change **Comprehensive** coverage from 500 to 1,000.
11. Click the **Policy Info** link.

#### Policy Info screen

12. Change the date in the **Effective Date** field to today's date.
13. Click the **Quote** button.

**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.

After quoting, the policyholder has decided to think about it further and will call back soon with a decision.