

Add Scheduled Items (Valuables Plus)

In Brief

In this Quick Card, you will change the Property policy to add scheduled items (Valuables Plus) to a policyholder's existing policy.

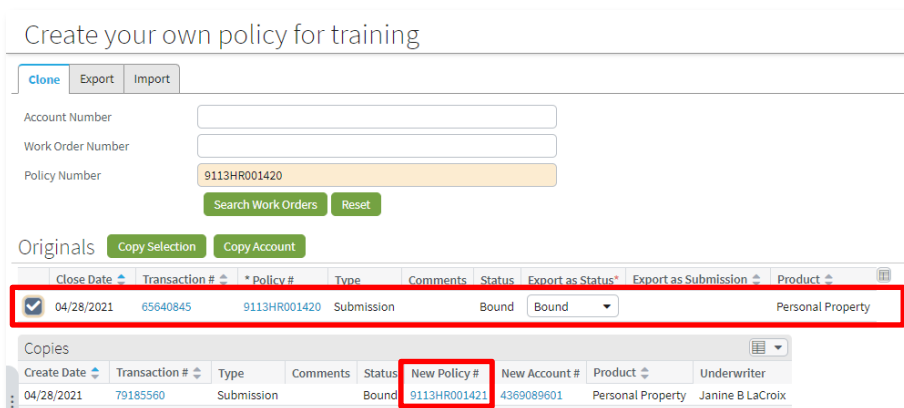
Log in to the [VTO](#) using the appropriate generic user account from the **VTO Information Guide** document.

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 list.
2. Enter "9113HR001420" in the **Policy 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 Transaction # **65640845**.



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 “**Change Policy**” from the drop-down list.

Start Policy Change screen

10. PolicyCenter defaults the **Effective Date** to the current system date. If necessary, you can change the date to a future date. In this example, accept the current date.
11. Click the **Next >** button.

Policy Info screen

12. Click the **Valuables Plus (Inland Marine)** link.

Valuables Plus (Inland Marine) screen

13. Enter “1” in the **Number of Items to add:** field in the *Jewelry Scheduled Items*.
14. Click the **Add** button.
15. Enter information into the **Description** field. For example, “**Kay Jewelers LEO Diamond 4CT Tennis Bracelet**”.
16. Enter “3750” in the **Value** field.
17. Enter “03162021” into the **Appraisal Date** field.
18. Click the **Quote** button.

Quote screen

19. Click the **Issue Change** button.
20. Click the **OK** button.

Policy Change Bound screen

PolicyCenter displays the message, “*Your Policy Change (#XXXX) has been bound.*”