

Description:

This job aid reviews how to export Farm Personal Property and import Farm Personal Property with deductible changes. Import/Export function can also be utilized for Farm Structures, Business Auto* and Commercial Property*.

* *Business Auto* - available for drivers and vehicles (not for deductible updates), import vehicles on a class basis

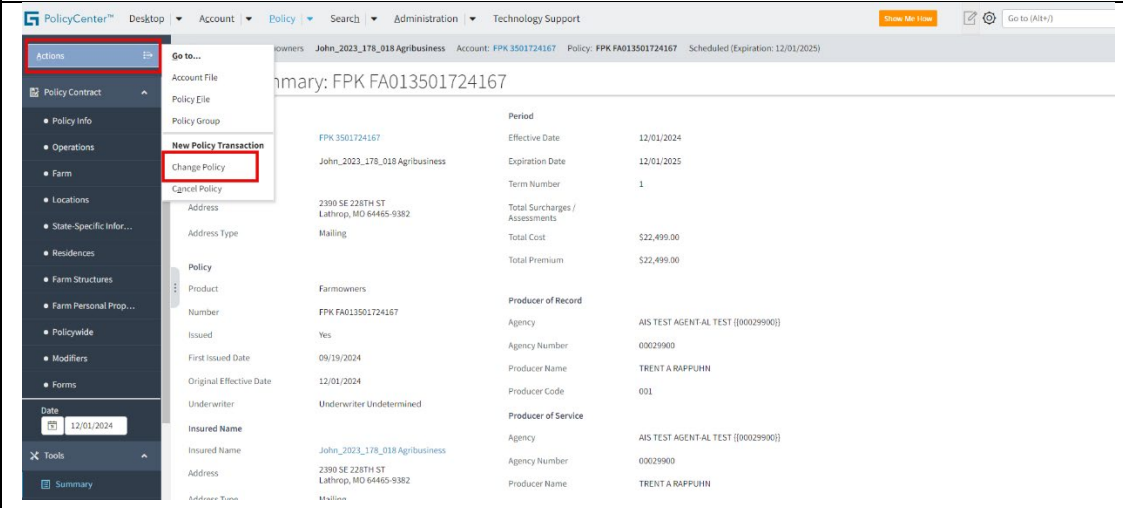
* *Commercial Property* – Only during a change

- To utilize the import function, begin at step 1 completing the export function first
- To utilize export function only begin at step 3

Click each link below to jump to the relevant process steps:

- [Import/Export Personal Property](#)
- [Export Personal Property Only](#)
- [Refer to Underwriting](#)
- [Auto Bulk Edit](#)

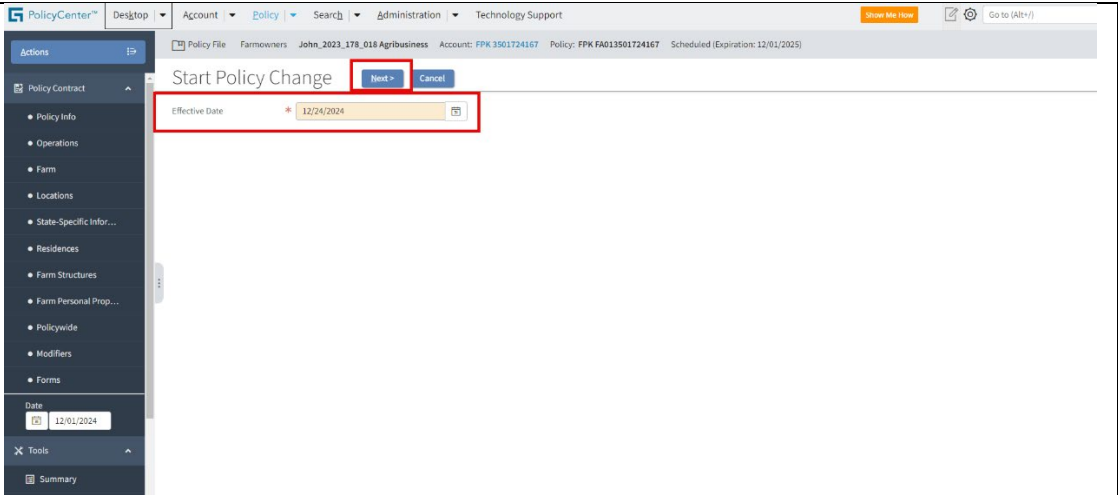
Import/Export Personal Property

Step	Action	Screen
1	Navigate to an existing Farm policy: • See Step 3 to export <u>only</u> • Click Actions • Select Change Policy from the drop-down menu.	

2

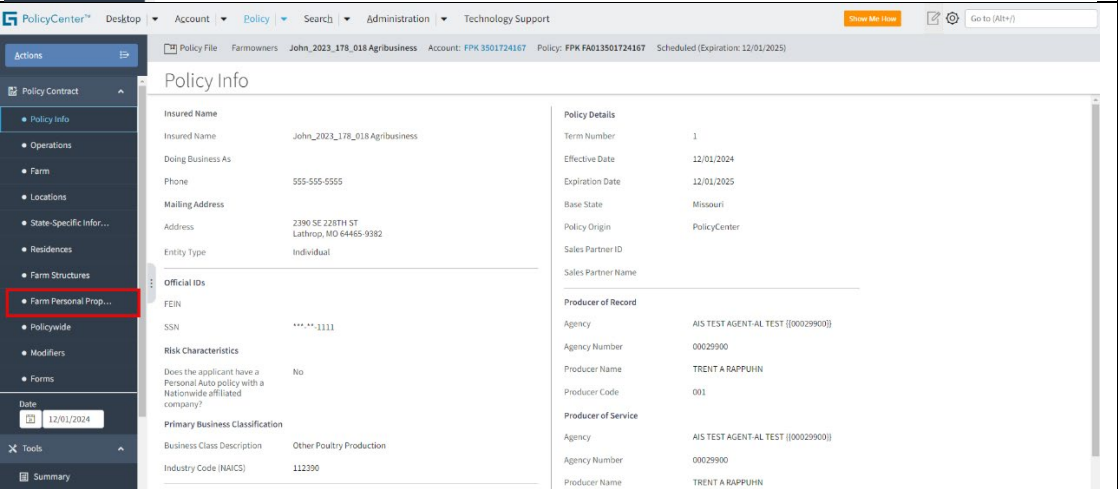
On the *Start Policy Change* screen, the Effective Date field defaults to the current date:

- Enter the appropriate date in the Effective Date field
- Click **Next**



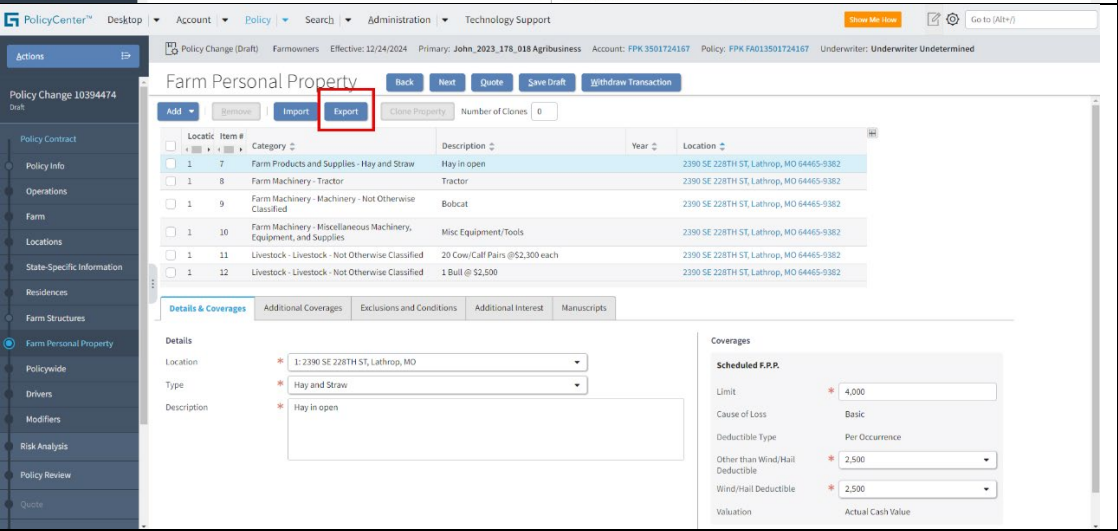
3

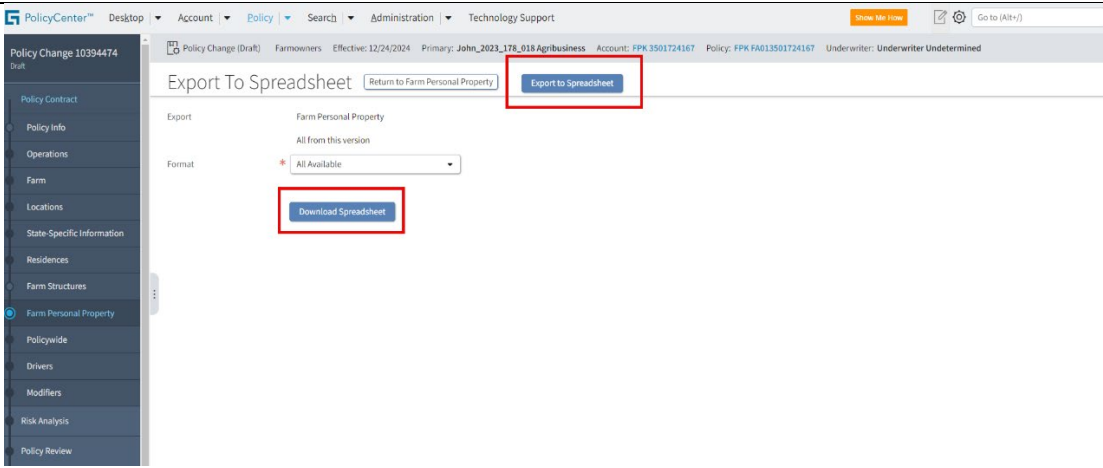
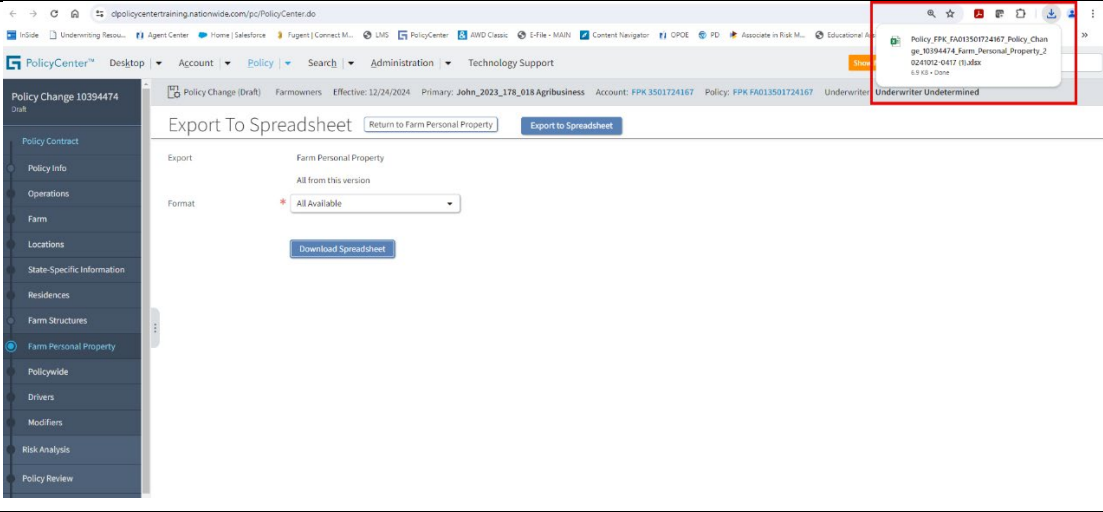
Select **Farm Personal Property** from the left-hand menu



4

Select **Export** from the top middle menu



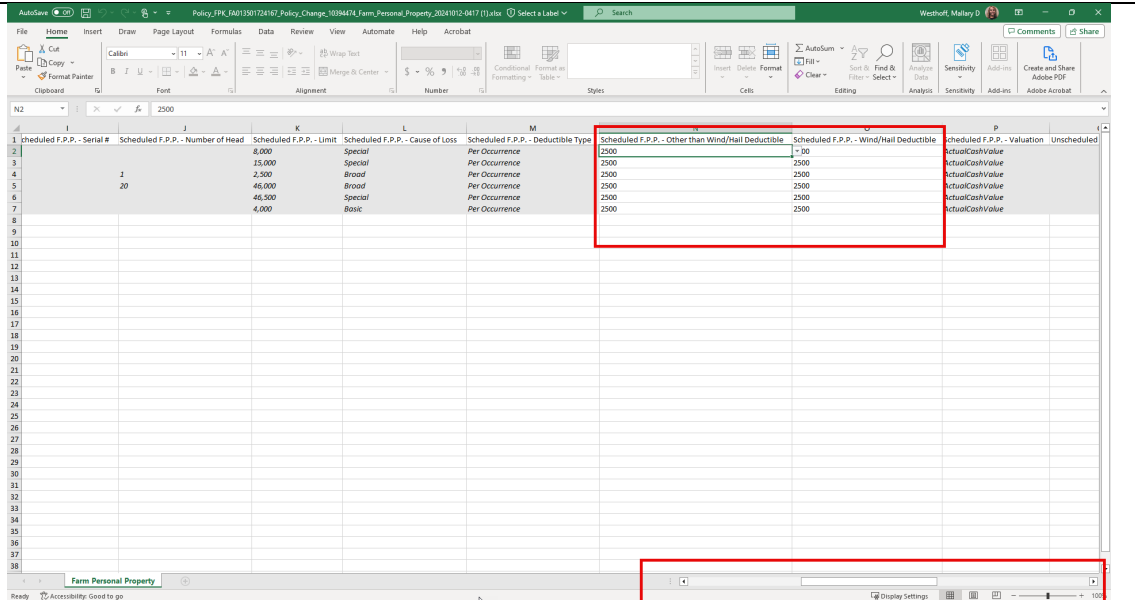
5	On the <i>Export to Spreadsheet</i> screen select Export to Spreadsheet • <i>All Available</i> will default as the format type • Once download is complete select Download Spreadsheet	
6	An Excel Spreadsheet will download. • Open the download from the top of the screen • All Farm Personal Property will be exported to an Excel Spreadsheet	

Export function complete, continue to step 7 for Import function

7

Open downloaded Excel Spreadsheet:

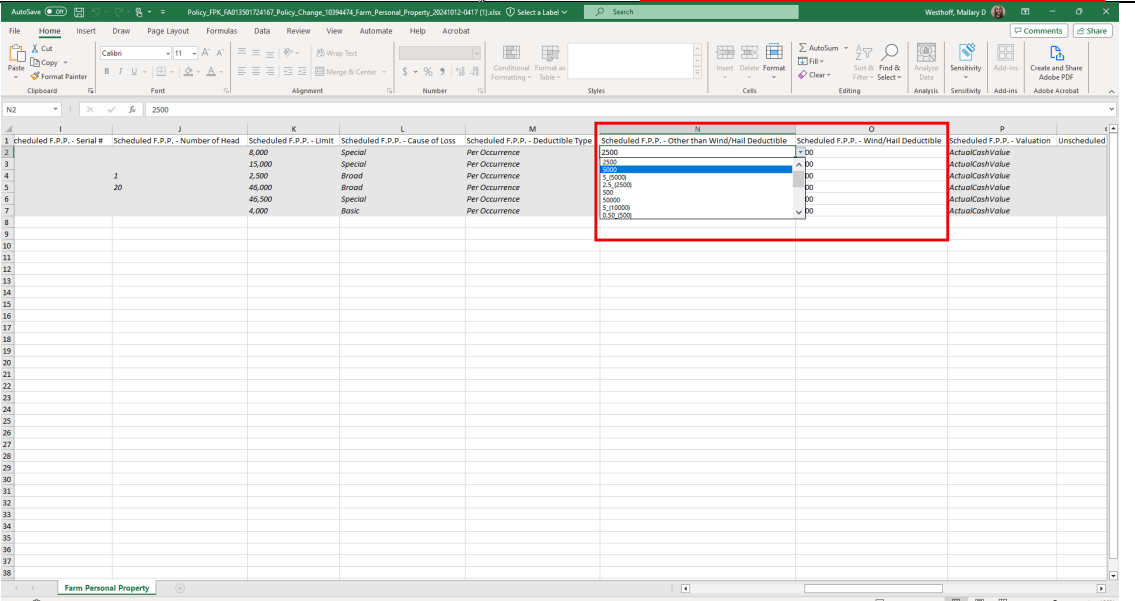
- Scroll to the right to *Scheduled F.P.P. – Other than Wind/Hail Deductible* and *Scheduled F.P.P. – Wind/Hail Deductible*



8

Select new deductible from drop down list in Excel Spreadsheet

- Old deductible options may still show in the dropdown, **do not use them**, it will error and not process
- Once all changes have been made save Excel Spreadsheet



9

In *Policy Center* select **Return to Farm Personal Property**

PolicyCenter™ Desktop

Account | Policy | Search | Administration | Technology Support

Policy Change 10394474 Draft

Policy Change (Draft) Farmowners Effective: 12/24/2024 Primary: John_2023_178_018 Agribusiness Account: FPK 3501724167 Policy: FPK FA013501724167 Underwriter: Underwriter Undetermined

Export To Spreadsheet

Return to Farm Personal Property

Export to Spreadsheet

Export Farm Personal Property All from this version Format: All Available Download Spreadsheet

10

Select **Import**

PolicyCenter™ Desktop

Account | Policy | Search | Administration | Technology Support

Policy Change 10394474 Draft

Policy Change (Draft) Farmowners Effective: 12/24/2024 Primary: John_2023_178_018 Agribusiness Account: FPK 3501724167 Policy: FPK FA013501724167 Underwriter: Underwriter Undetermined

Farm Personal Property

Import

Export

Close Property

Number of Clones 0

Locat	Item #	Category	Description	Year	Location
☐	1 7	Farm Products and Supplies - Hay and Straw	Hay in open		2390 SE 228TH ST, Lathrop, MO 64465-9382
☐	1 8	Farm Machinery - Tractor	Tractor		2390 SE 228TH ST, Lathrop, MO 64465-9382
☐	1 9	Farm Machinery - Machinery - Not Otherwise Classified	Bobcat		2390 SE 228TH ST, Lathrop, MO 64465-9382
☐	1 10	Farm Machinery - Miscellaneous Machinery, Equipment, and Supplies	Misc Equipment/Tools		2390 SE 228TH ST, Lathrop, MO 64465-9382
☐	1 11	Livestock - Livestock - Not Otherwise Classified	20 Cow/Call Pairs @\$2,300 each		2390 SE 228TH ST, Lathrop, MO 64465-9382
☐	1 12	Livestock - Livestock - Not Otherwise Classified	1 Bull @\$2,500		2390 SE 228TH ST, Lathrop, MO 64465-9382

Details & Coverages

Additional Coverages

Exclusions and Conditions

Additional Interest

Manuscripts

Details

Location 1: 2390 SE 228TH ST, Lathrop, MO

Type Hay and Straw

Description Hay in open

Coverages

Scheduled F.P.P.

Limit 4,000

Cause of Loss Basic

Deductible Type Per Occurrence

Other than Wind/Hail Deductible 2,500

Wind/Hail Deductible 2,500

Valuation Actual Cash Value

11

Select **Browse**

- Select *saved excel spreadsheet*
- Select **Import**

PolicyCenter™ Desktop

Account | Policy | Search | Administration | Technology Support

Policy Change 10394474 Draft

Policy Change (Draft) Farmowners Effective: 12/24/2024 Primary: John_2023_178_018 Agribusiness Account: FPK 3501724167 Policy: FPK FA013501724167 Underwriter: Underwriter Undetermined

Import From Spreadsheet

Return to Farm Personal Property

Import

Cancel

Policy_FPK_FA013501724167

Browse...

12

Select **Accept Changes**

PolicyCenter™

Desktop

Account

Policy

Search

Administration

Technology Support

Print Me Later

Go to (Alt+)

Policy Change 10394474

Draft

Policy Contract

Policy Info

Operations

Farm

Locations

State-Specific Information

Residences

Farm Structures

Farm Personal Property

Policywide

Drivers

Modifiers

Risk Analysis

Policy Review

Quote

Forms

Policy Change (Draft)

Farmowners

Effective: 12/24/2024

Primary: John_2023_178_018 Agribusiness

Account: FPK3501724167

Policy: FPK FA013501724167

Underwriter: Underwriter Undetermined

Import From Spreadsheet

Return to Farm Personal Property

Cancel

Save Log

Accept Changes

Show Changes

Import Summary:

Number of Farm Personal Property Entities Read: 6

Number of Farm Personal Property Entities Edited: 6

Number of Farm Personal Property Entities Added: 0

Number of Farm Personal Property Entities Removed: 0

Number of Rows with Errors: 0

13

Select **Quote**

PolicyCenter™

Desktop

Account

Policy

Search

Administration

Technology Support

Print Me Later

Go to (Alt+)

Actions

Policy Change 10394474

Draft

Policy Contract

Policy Info

Operations

Farm

Locations

State-Specific Information

Residences

Farm Structures

Farm Personal Property

Policywide

Drivers

Modifiers

Risk Analysis

Policy Review

Quote

Forms

Policy Change (Draft)

Farmowners

Effective: 12/24/2024

Primary: John_2023_178_018 Agribusiness

Account: FPK3501724167

Policy: FPK FA013501724167

Underwriter: Underwriter Undetermined

Farm Personal Property

Back

Next

Quote

Save Draft

Withdraw Transaction

Add

Remove

Import

Export

Clone Property

Number of Clones: 0

Locality	Item #	Category	Description	Year	Location
☐	1	7	Farm Products and Supplies - Hay and Straw		2390 SE 228TH ST, Lathrop, MO 64465-9362
☐	1	8	Farm Machinery - Tractor		2390 SE 228TH ST, Lathrop, MO 64465-9362
☐	1	9	Farm Machinery - Machinery - Not Otherwise Classified		2390 SE 228TH ST, Lathrop, MO 64465-9362
☐	1	10	Farm Machinery - Miscellaneous Machinery, Equipment, and Supplies		2390 SE 228TH ST, Lathrop, MO 64465-9362
☐	1	11	Livestock - Livestock - Not Otherwise Classified		2390 SE 228TH ST, Lathrop, MO 64465-9362
☐	1	12	Livestock - Livestock - Not Otherwise Classified		2390 SE 228TH ST, Lathrop, MO 64465-9362

Details & Coverages

Additional Coverages

Exclusions and Conditions

Additional Interest

Manuscripts

Details

Location

Type

Description

1: 2390 SE 228TH ST, Lathrop, MO

Hay and Straw

Hay in open

Coverages

Scheduled F.P.P.

Limit

Cause of Loss

Deductible Type

Other than Wind/Hail Deductible

Wind/Hail Deductible

Valuation

4,000

Basic

Per Occurrence

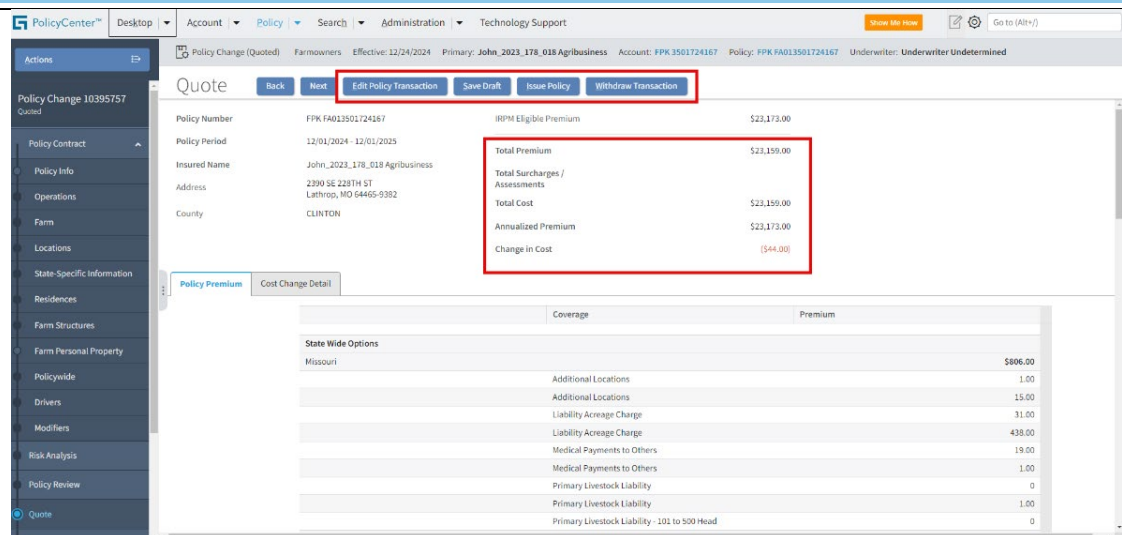
5,000

5,000

Actual Cash Value

14 Once quoted:

- The **Total Premium** is the full-term premium including the prorated amount for this change.
- The **Annualized Premium** is full-term premium assuming that all changes, including this change, were effective for a full-term
- The **Change in Cost** is the prorated premium related to this change



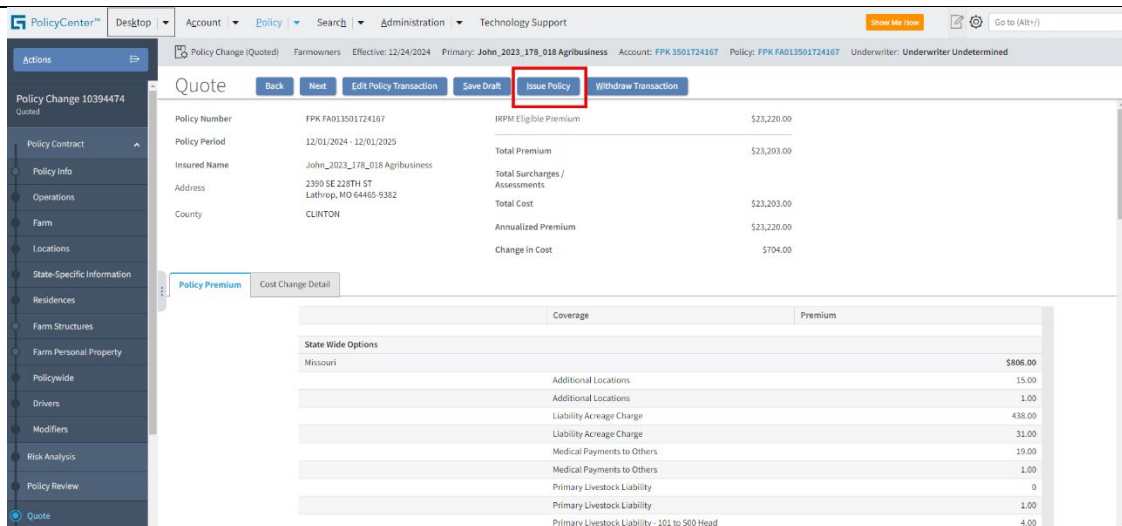
Policy Number	Policy Period	Insured Name	Address	County
FPK FA012501724167	12/01/2024 - 12/01/2025	John_2023_178_018 Agribusiness	2390 SE 228TH ST Lathrop, MO 64465-9382	CLINTON

Item	Amount
IRPM Eligible Premium	\$23,173.00
Total Premium	\$23,159.00
Total Surcharges / Assessments	
Total Cost	\$23,159.00
Annualized Premium	\$23,173.00
Change in Cost	(\$44.00)

Coverage	Premium
State Wide Options	
Missouri	\$806.00
Additional Locations	1.00
Additional Locations	15.00
Liability Acreage Change	31.00
Liability Acreage Change	438.00
Medical Payments to Others	19.00
Medical Payments to Others	1.00
Primary Livestock Liability	0
Primary Livestock Liability	1.00
Primary Livestock Liability - 101 to 500 Head	0

- Agent can select **Issue Policy** if change is requested
- To amend the quote, click **Edit Policy Transaction**
- If agent needs to come back to quote, select **Save Draft**
- If change is not needed, **Withdraw Transaction**
- *If the quote print(s) are needed, click the Forms link on the left side of the screen*
- *Quotes stay on PolicyCenter for 30 days*

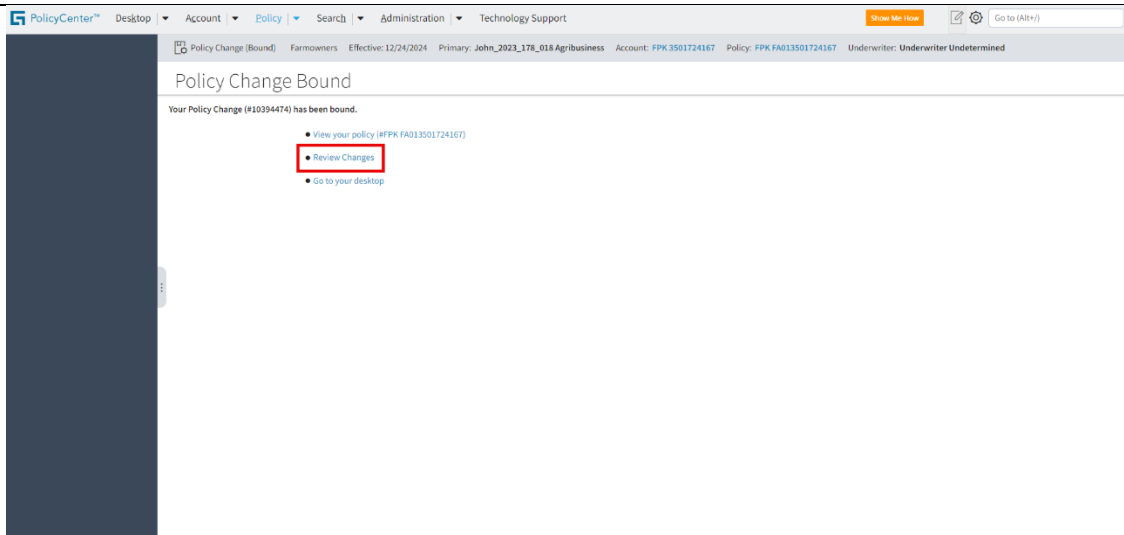
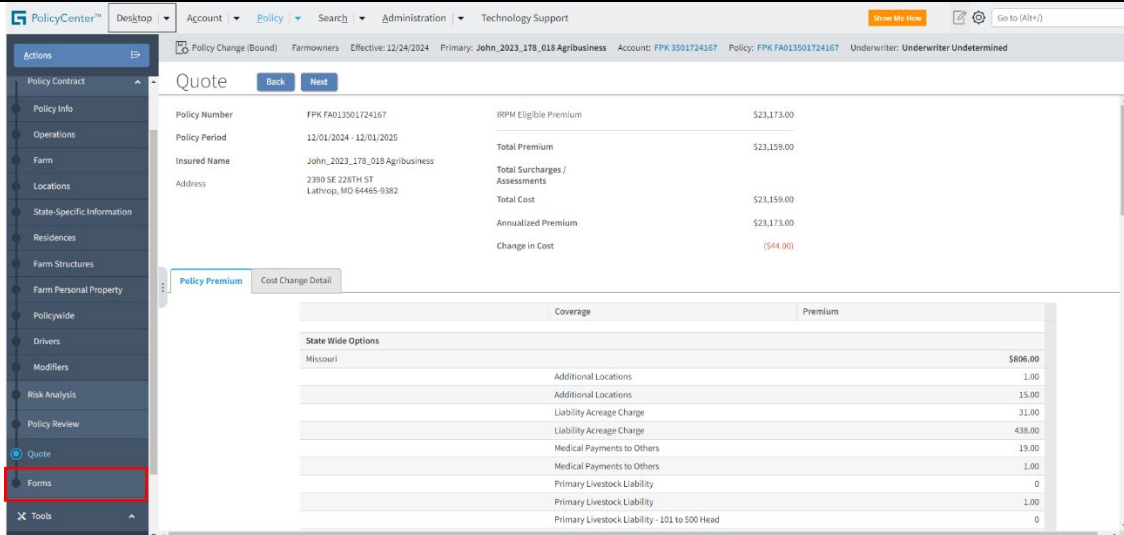
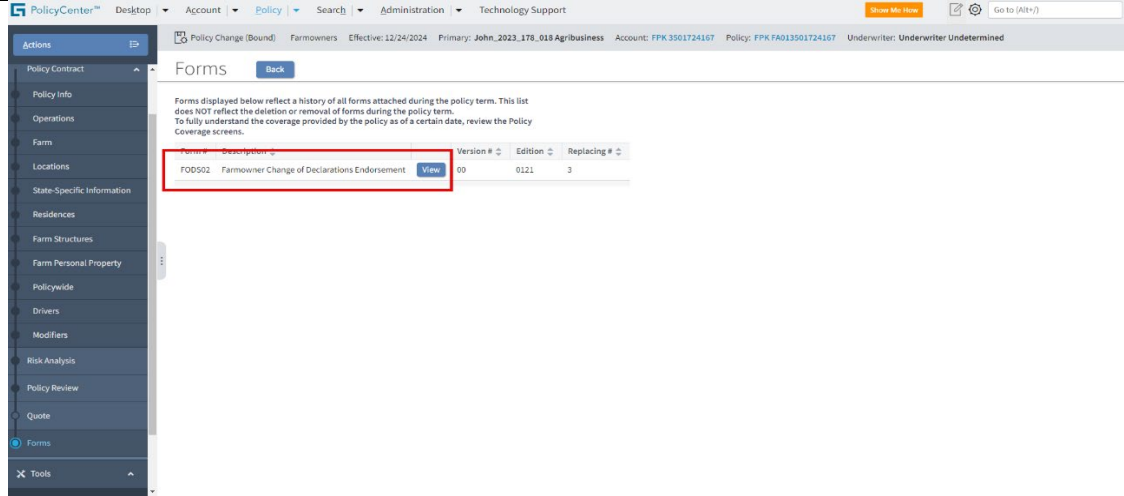
15 Select Issue Policy



Policy Number	Policy Period	Insured Name	Address	County
FPK FA013501724167	12/01/2024 - 12/01/2025	John_2023_178_018 Agribusiness	2390 SE 228TH ST Lathrop, MO 64465-9382	CLINTON

Item	Amount
IRPM Eligible Premium	\$23,220.00
Total Premium	\$23,203.00
Total Surcharges / Assessments	
Total Cost	\$23,203.00
Annualized Premium	\$23,220.00
Change in Cost	\$704.00

Coverage	Premium
State Wide Options	
Missouri	\$806.00
Additional Locations	15.00
Additional Locations	1.00
Liability Acreage Change	438.00
Liability Acreage Change	31.00
Medical Payments to Others	19.00
Medical Payments to Others	1.00
Primary Livestock Liability	0
Primary Livestock Liability	1.00
Primary Livestock Liability - 101 to 500 Head	4.00

16	This is the Policy Change Bound screen. Agents can print endorsements by clicking Review Changes	
17	Select Forms from the left-hand menu	
18	Select View next to the Change of Declarations Endorsement	

[Return to the top](#)

Auto Bulk Edit

1

Select Vehicles

- Check boxes to the left of the vehicles
- Select Bulk Edit

Actions

Policy Change 10393211

Policy Contract

Policy Info

Commercial Auto

Drivers

Locations

State-Specific Information

Vehicles

Modifiers

Risk Analysis

Policy Review

Quote

Forms

Tools

Notes

Participants

Policy Change (Draft)

Commercial Auto (v7)

Effective: 12/01/2024

Primary: John 2023, 178, 018 Agribusiness

Account: FPK 3501724167

Policy: FPK 0A013501724167

Underwriter: Underwriter Undetermined

Vehicles

Back

Next

Quote

Save Draft

Withdraw Transaction

Add

Remove

Bulk Edit

Import

Export

Suspend

Reinstate

Clone Vehicle

Number of Clones

1

View

All

Filter By

Vehicle #

Vehicle Type

Year

Make

Model

VIN

VIN Validated

Class Code

Location

1

2

3

4

Truck/Trailer

2014

FORD

F350F350 XLT 4x2 Chassis & Cab Super Duty with Hydraulic Brakes

1FDUP55V1EEA78707

Yes

23135

1: 2390 SE 228TH ST, Lathrop, MO

Truck/Trailer

1997

DODGE

2500Club 4x4 25 HD

3B1KF23D9W651142

Yes

60235

1: 2390 SE 228TH ST, Lathrop, MO

Truck/Trailer

2015

FORD

F350F350 4x4 Chassis & SuperCab Super Duty

1FTFX3B8FEEC15001

Yes

23235

1: 2390 SE 228TH ST, Lathrop, MO

Truck/Trailer

2017

Other

Other

260

No

68169

1: 2390 SE 228TH ST, Lathrop, MO

Details & Coverages

Additional Coverages

Exclusions & Conditions

Additional Interests

Details

Coverages

Location

1: 2390 SE 228TH ST, Lathrop, MO

New Location

Vehicle Sequence

1

Vehicle Unique ID

Year

2014

Vehicle Identification Number

1FDUP55V1EEA78707

Make

FORD

Model

F350F350 XLT 4x2 Chassis & Cab Super Duty w/ Hydraulic Brakes

Liability

Liability Coverage Type

Combined Single Limit

Liability Limit

1,000,000

Liability Deductible

No Deductible

Medical Payments

Medical Payments Limit

5,000

Uninsured Motorist

Uninsured Motorist Coverage

Yes

Underinsured Motorist

- Do not use Import/Export for auto deductible edits; use the Bulk Edit function
- Will not work if less than 2 vehicles are selected and/or different vehicle classes are selected together
- All selected vehicles must be the same type to edit

Refer to Underwriting

1

If underwriter referral is required, select Risk Analysis

Actions

Policy Change 10355481

Quoted

Policy Contract

Policy Info

Commercial Auto

Drivers

Locations

State-Specific Information

Vehicles

Covered Vehicles

Modifiers

Risk Analysis

Policy Review

Quote

Forms

PolicyCenter™

Desktop

Account

Policy

Search

Administration

Technology Support

Policy Change (Quoted)

Commercial Auto (v7)

Effective: 10/16/2023

Primary: R5_Scenario094_00008

Account: FPK 3501697567

Quote

Back

Next

Edit Policy Transaction

Save Draft

Issue Policy

Withdraw Transaction

This quote will require underwriting approval prior to issuance.

Policy Number

FPK 3A013501697567

Schedule Rating Premium

Policy Period

12/01/2022 - 12/01/2023

Total Premium

Insured Name

R5_Scenario094_00008

Total Surcharges / Assessments

Address

24335 NW WEST UNION RD

Hillsboro, OR 97124-8527

Total Cost

County

WASHINGTON

Annualized Premium

Change in Cost

Policy Premium

Cost Change Detail

Coverage

Rate

Annual Premium

Eft. Date

Exp. Date

Commercial Auto

Business Auto Protection

237.5

\$238.00

Thu Dec 01 00:01:00 EST 2022

Mon Oct 16 00:00:00 EDT 2023

Business Auto Protection

250

\$250.00

Mon Oct 16 00:00:00 EDT 2023

Fri Dec 01 00:00:00 EST 2023

1: 24335 NW WEST UNION RD, Hillsboro, OR

Vehicles

1: Truck/Trailer, 2016 FORD F-150Crew XL 4x4 (1FTEW1EP2GFD52780)

Liability

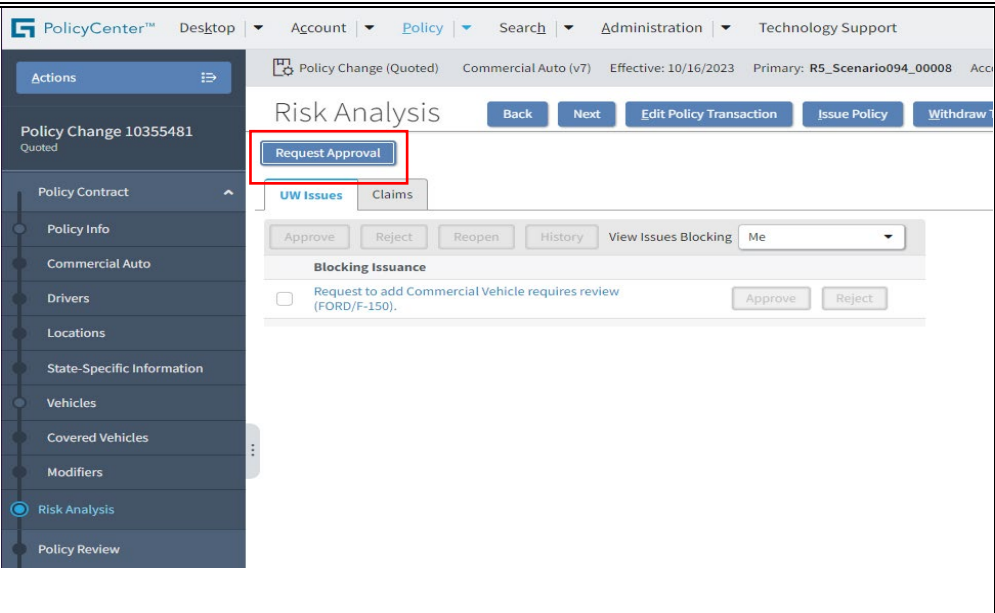
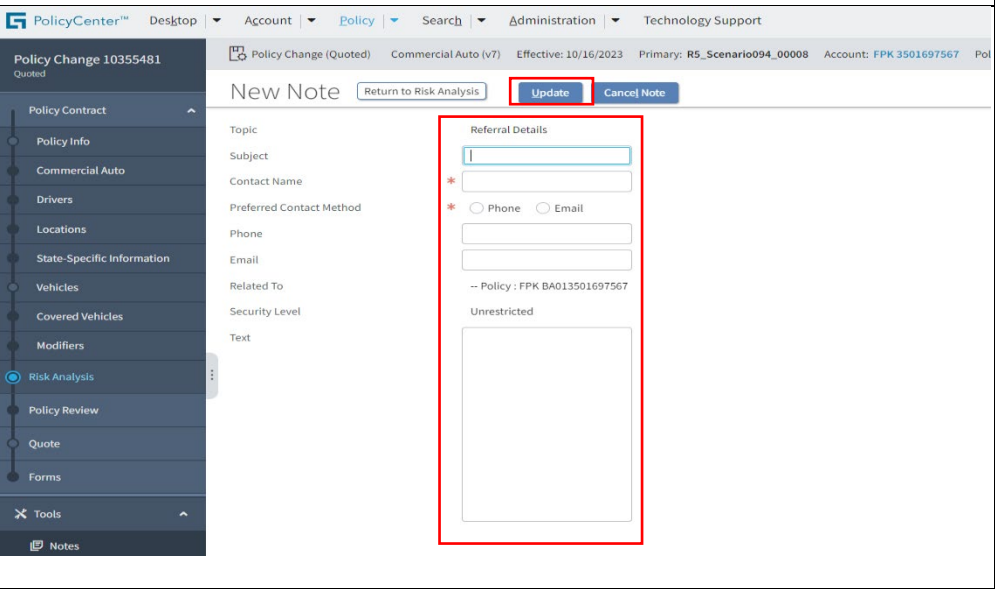
523.45

\$523.00

Thu Dec 01 00:01:00 EST 2022

Mon Oct 16 00:00:00 EDT 2023

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2	Select Request Approval	 The screenshot shows the PolicyCenter interface for a 'Policy Change 10355481 Quoted'. The left sidebar lists various sections, with 'Risk Analysis' selected. The main content area is titled 'Risk Analysis' and includes buttons for 'Request Approval' (highlighted with a red box), 'Back', 'Next', 'Edit Policy Transaction', 'Issue Policy', and 'Withdraw'. Below this, there are tabs for 'UW Issues' and 'Claims'. The 'UW Issues' tab is active, showing a 'Blocking Issuance' section with a checkbox and the text 'Request to add Commercial Vehicle requires review (FORD/F-150)'. There are 'Approve' and 'Reject' buttons for this issue.
3	Complete the requested information: • Referrals to underwriting lock that line of business until reviewed by underwriting, but do not affect other lines of business on the account • Select Update • Complete <i>Are you sure you want to request approval?</i> • Select OK	 The screenshot shows the 'New Note' page in PolicyCenter. The left sidebar is the same as in the previous screenshot. The main content area has a 'New Note' title and buttons for 'Return to Risk Analysis', 'Update' (highlighted with a red box), and 'Cancel Note'. Below these are fields for 'Topic', 'Subject', 'Contact Name', 'Preferred Contact Method', 'Phone', 'Email', 'Related To', 'Security Level', and 'Text'. A 'Referral Details' section is highlighted with a red box, containing a text input field, a radio button for 'Phone' (selected), a radio button for 'Email', and a text input field. Below this, it says '-- Policy : FPK BA013501697567' and 'Unrestricted'.

[Return to the top](#)