Description:

Ctop 2

This job aid describes the process for creating a new State Transfer (IRT). Whenever a policyholder moves from one state to another, an IRT is necessary. A new set of state regulations is applicable, so PolicyCenter must apply a different set of rules. Once the account information is updated or a new account is created, start a new submission for the new state. The policy providing coverage in the former state must be cancelled by the original agent.

This process is very similar between product lines; the only difference is the cancellation reason selected for Property.

Click the appropriate hyperlink to view the steps:

- o Start the State Transfer's New Submission with Updated State
 - o Cancel the Original Policy in the Previous State

Start the State Transfer's New Submission with Updated State

Steph				
Action			Screen	
On the Account File Summary screen,	Goto(Alt			
after a new account is created or the	<u>A</u> ctions ⋮⇒	Create	Account # 7968782127	
policyholder's account information is	I Summary	New Submission	UMMAIV Refresh Change Account Holder To 💌	
updated:		Move Policies to this Account		
1		Merge Account into this Account	7968782127	
 Click the <u>Actions</u> button. Select "New Submission" from the drop-down menu. 	Policy Transactions	Account Name	Veronica Salt	
	🔛 Submission Manager	Status	Pending	
	ଟି Underwriting Files	Address	Crowne Point, IN 47307	
	A	Country	United States of America	
	2 Related Accounts	SSN	***-**-5516	
	Ω <u>H</u> istory	Current Activities		
		Created Date 🚖 Due Date 🚖	Priority 🚖 Subject 🚖 🕹 Assign	ned To

Action	Screen		
On the <i>New Submissions</i> screen:	PolicyCenter [™] Desktop ▼ Agcount ▼ Policy ▼ Search ▼ Ieam Administration ▼ : ② ③ Goto (A New Submissions		
• Ensure the correct Rate State is selected.	Select Producer Organization PC Training Agency Producer Code * 130010258 Training Agent •		
• Select the radio button to the left of the appropriate Product Name .	Product Dires Rate State * Indiana		
Click the Select button.	Product Name \$ Product Description \$ Personal Auto Private Passenger, Named Non-Owner, Utility Trailers Homeowner Homeowner Condominium Condominium		
	Dwelling Fire Dwelling Fire Personal Umbrelia Personal Liability Motorcycles and Off-Road Motorcycles, Snowmobiles, ATVs, Utility Trailers Pleasure Boatowners Boats, Personal Watercraft, Trailers Pleasure Boatowners Autorcycles and Velace Motorchomes. Travel Trailers. Utility Trailers		

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Job Aid Process (New Submission Cont.) :

Step 3



Warning: The policy providing coverage in the former state must be cancelled by the original agent. Steps in the next section describe how to cancel the original policy written for the previous state.



Cancel the Original Policy in the Previous State

Step 1		
Action	Screen	
On the <i>Summary</i> screen, note the Number of Terms field in the <i>Period</i>	PolicyCenter [®] Desktop Account Bolicy Search Ieam Administration	Go to (Alt
section.	Actions Go to North Carolina Veronica Sait Account # 142633149 Policy # 61	.32V 900001 IN Force (
Click the <u>Actions</u> button.	Policy Info Create Drivers New Activity Associated Policy Trav	nsaction
 Select "Cancel Policy" from the drop- down menu. 		11/27/2021 11/27/2021 Submissioi
	Usage Based Insurance New Policy Transaction sonal Auto Period Coverages Change Policy 2V 900001 Effective Date	11/23/2021
	Lienholder/Additional Change Policy - Producer Code Update 23/2021 Expiration Date Cancel Policy Renew Policy TableCod	05/23/2022

Step 2

Action

On the *Start Cancellation For Policy* #XXXX XXXX screen:

- Select "**Insured**" from the **Source** field drop-down list.
- Select "**Transfer**" from the **Reason** field drop-down list.
- Enter "**Regional Transfer**" into the **Reason Description** field.

PolicyCenter defaults the **Cancellation Effective Date** field to the current date. If necessary, you can change the default date.

• Click the **Start Cancellation** button.



Note: If it is a **Property** policy, select **"Inter-Regional Transfer"** from the **Reason** field dropdown list.





Job Aid Process (Cancel the Original Cont.):

Step 3

		Screen		
PolicyCenter [™] Des <u>k</u> top	 Account 	Searc <u>h</u> ▼ <u>I</u> eam <u>A</u> dministration ▼	: 🛛 🕲 💿	to (Alt
Actions ⋮∋	Confirmation (Quoted)	Personal Auto North Carolina Eff. 11/27/2021 Vero Sack Edit Cancel Options Close Op	onica Salt Account # 142633149	Polic
Quoted Entry Confirmation	To finalize your cancellation, ple Policy Number Primary Named Insured Policy Address	ase select a Cancel Optic 6132V 900001 Veronica Salt 2226 HAVERSHAM CT	Policy Period Previous Policy Full Term Premium	11 56
 Tools Notes Available Coverages 	County Residual Market Policy Placement	CHARLOTTE, NC 282.16 MECKLENBURG RM 05 Voluntary		
Documents Participants	Summary Premium Details	Cost Change Details		
	PolicyCenter [™] Desktop Actions IP Cancellation 414871 IP Quoted IP Entry Confirmation X Tools Notes Available Coverages Documents Participants	PolicyCenter [®] Desktop Account Policy Actions PolicyCenter [®] Desktop Account Policy Cancellation (Quoted) Confirmation To finalize your cancellation, ple Policy Number Policy Number Policy Number Policy Number Policy Number Policy Address County Residual Market Policy Placement Summary Prenium Details Anoliced Discounts (St	Screen PolicyCenter* Desktop Account Bolicy Search Iam Administration Actions Concellation (Quoted) Personal Auto Noth Caroling of 11/27/202 Vero Entry Confirmation Base Carcellation Spedule Carcellation Entry Ofinalize your cancellation, please select a Carcel option Spedule Carcellation Option Spedule Carcellation Entry Ofinalize your cancellation, please select a Carcel option Spedule Carcellation Option Option Carcellation Entry Option Mumber 6132/90001 Option Mumber Carcellation Carcellation Entry Notes Option Mumber Filloy Aldres Carcellation Carcellation Entry Notes Notes Seadual Marke Mumber Nothice Discon unts /Surce	Screen PolicyCenter* Desktor Account @ Deicy @ Search @ Tem @dministration @ E 11/27/202 Veronica Sett Account # 142633140 Consellation (Quoted @ Personal Auto North Carolina @ Ef 11/27/202 Veronica Sett Account # 142633140 Consellation (Quoted @ Personal Auto North Carolina @ Ef 11/27/202 Veronica Sett Account # 142633140 Consellation (Quoted @ Personal Auto North Carolina @ Ef 11/27/202 Veronica Sett Account # 142633140 Consellation (Quoted @ Personal Auto North Carolina @ Ef 11/27/202 Veronica Sett Account # 142633140 Consellation (Quoted @ Personal Auto North Carolina @ Ef 11/27/202 Veronica Sett Account # 142633140 Confirmation Confirmation, please setet a Cancel Optive @ Genel Nov Policy Audress Carolica Veronica Satt Policy Audress Carolica Veronica Satt Policy Audress Carolica Market Bitizy Placement Voluntary Sensitive Veronica Sett Voluntary Anolicad Discountes /Surchardset Anolicad Discountes /Surchardset

Step 4	
Action	Screen
The <i>Cancellation Bound</i> screen displays confirming the cancellation of the policy.	PolicyCenter [®] Desătop • Account • Policy • Search • Jeam Administration • Cancellation (Bound) • Personal Auto North Carolina Eff. 11/27/2021 Verenica Sait Account # 142633149 Cancellation Bound Vour Cancellation (#414871) has been bound, pending billing account setup. • View your pelicy (#6320/900001) • Documenta • Co to your desitop

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