Description:

This job aid reviews how to update the coverages on an existing Umbrella policy. Any changes to a current policy require a new policy transaction, re-quoting the policy, and issuing the changes. Once changes are made to an existing policy on the Umbrella policy, the entire Umbrella policy automatically updates.

In this example, you will update the Umbrella Liability limit from 1ML to 2ML. Underwriting approval may be required for limits over 5ML or higher or if another underwriting issue is identified.

Action	Screen
Navigate to an existing Umbrella policy:	PolicyCenter [®] Desktop • Account • Policy • Search • Team Administration • Testing • Training •
Click the Actions button.	Account File Policy Ele Create
Select " Change Policy " from the drop-	
down menu.	Consection: Change Tolly - Producer Code Update sonal Umbrella Period Quode Cancel Policy 3FV200017 Effective Date 10/29/202 Forms Renew Policy 29/2021 Expiration Date 10/29/202
	Date Primary Mamed Insured Number of Terms 1 Name VeroNick Salt Total Cost 5148.25 Policy Address 10 MONROE BLVD Billing Status
	County VIGO Producer of Record County VIGO Producer of Record County VIGO Producer of Record Portacized Standard Producer Code 13001208: Participants Producer of Society

otop =	
Action	Screen
On the <i>Start Policy Change</i> screen, the Effective date field defaults to the current date.	Policy/Center® Desigtop Account Policy Search Iam Administration Testing Training Actions Policy File R Penonal Umbrelia Indiana Veronica Salt Account 5104349175 Policy 5113PU200017 In Porce [D Policy Info Policy Info Underlying Policies
• If needed, you may enter a new date in the Effective Date field.	Household Members Velicke Exposures Coverages Coverages Quote
• Click the <u>N</u> ext > button.	• Forms
Stop 2	
Step 5	
Action	Screen
Action On the Policy Info screen:	Screen
Action On the Policy Info screen:	Screen
Action On the Policy Info screen: • Click the Coverages link.	Screen
Action On the Policy Info screen: • Click the Coverages link.	Screen PolicyCenter® Destop Account Policy Search Jeam Administration Testing Training Account Stor PolicyCenter® Destop Account Policy Search Jeam Administration Testing Training PolicyCenter PolicyCenter® Destop Account Policy Destop
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Job Aid Process (Cont.) :

Step 4



Step 6	
Action	Screen
On the <i>Quote</i> screen:	PolicyCenter* Desktop Account Policy Pelicy Search I eam Administration Testing Training Account PolicyCenter* Desktop PolicyCenter* PelicyCenter* Testing <!--</td-->
 Click the Issue Change button. Policy Change 64020503 Queted Policy Change 64020503 Poli	Policy Change 64020503 QUOTE Rask Next > Edit Issue Change Withdraw Work Order Yerew Bill Calculator Quoted Policy Contract Policy Contract Policy Contract Policy Contract Policy Contract Policy Address Policy Address Policy Contract Policy Address Policy Address Policy Contract Policy Address Policy Address Policy Contract Policy Address Policy Contract Policy Address Policy Contract Policy Address Policy Address Policy Contract Policy Address Policy Contract Policy Address Policy Contract Policy Address Policy Contract Policy Contract Policy Address Policy Contract Policy Address Policy Contract Policy Co
confirmation pop-up window.	Vehicle Exposures Costing Vehicle Exposures Premium 0 Vehicle Exposures Summary Cost Change Details 0 Coverages Description Amount Eff Date Exp Date Promium Underwriting Umbrella Lability Coverage 5237.22 11/04/2021 10/29/2022 0.9836 5233.33



Job Aid Process (Cont.) :

Step 7

Action	Screen
The Policy Change Bound screen displays, confirming the binding of the policy change. The overall Umbrella policy is automatically updated with the change as well.	PolicyCenter** Desktop Account Policy Change (Bound) Personal Umbrella Indiana Effective: 11/04/2021 Primary: Veronica Salt Account: 51045 Policy Change (#64020503) has been bound. View your policy (#9113PU200017) Documents Review Changes Go to your desktop Required Trailing Documents Go to your desktop Required Trailing Documents Electronic Document Agent's Office Yes Optional Optiona

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