Schedule a Cancellation

In Brief

In this Quick Card, you will schedule a policy cancellation for a future date. For example, a policyholder calls and requests his policy be cancelled on the 1st of the next month.
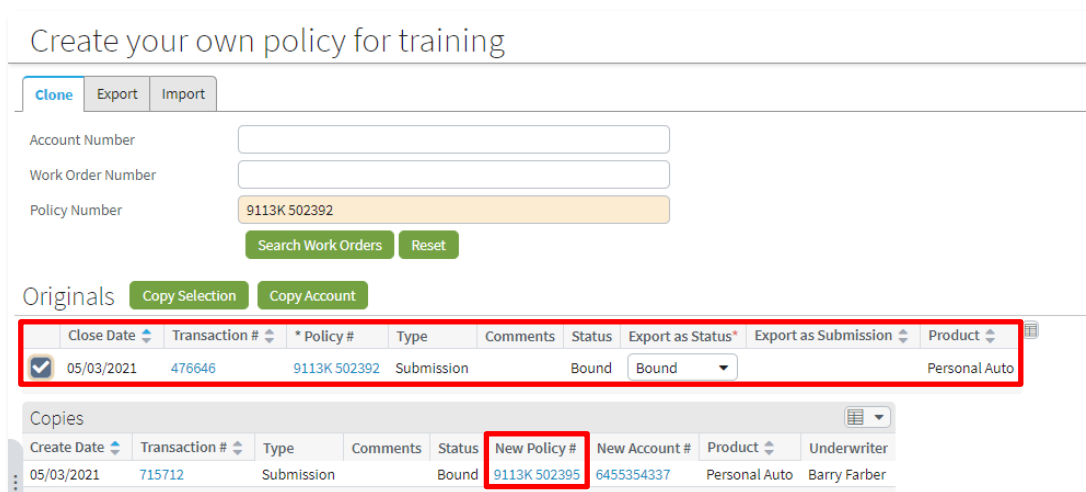
Log in to the VTO using the appropriate generic user account from the **VTO Information Guide** document.

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 "9113K 502392" in the **Policy Number** field exactly as it is shown.
3. Click the **Search Work Orders** button.
4. In the *Originals* section, click the checkbox to the left of the **Submission** Policy Tansaction Type for the policy being cloned. In this example, select the checkbox to the left of Transaction # 476646.

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 "**Cancel Policy**" from the drop-down menu.

Start Cancellation For Policy # screen

10. Select "**Insured**" from the **Source** field drop-down list.
11. Select "**Request**" from the **Reason** field drop-down list.
12. Enter a description in the **Reason Description** field. For example, "*Policyholder cancelling policy*"
13. Enter the first day of next month in the **Cancellation Effective Date** field.
14. Click the **Start Cancellation** button.

Confirmation screen

15. Click the **Cancel Options** button.
16. Select "**Schedule Cancellation**" from the drop-down list.
17. Click the **OK** button.

Cancellation Scheduled screen

The system displays the message, "*Your cancellation (#XXXX) has been scheduled for…*"