

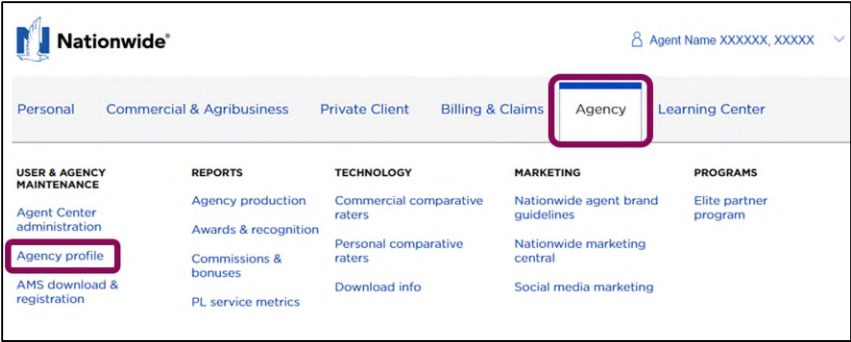
How to Remove a Producer & Transfer Renewals

Agent Center – Personal Lines Only

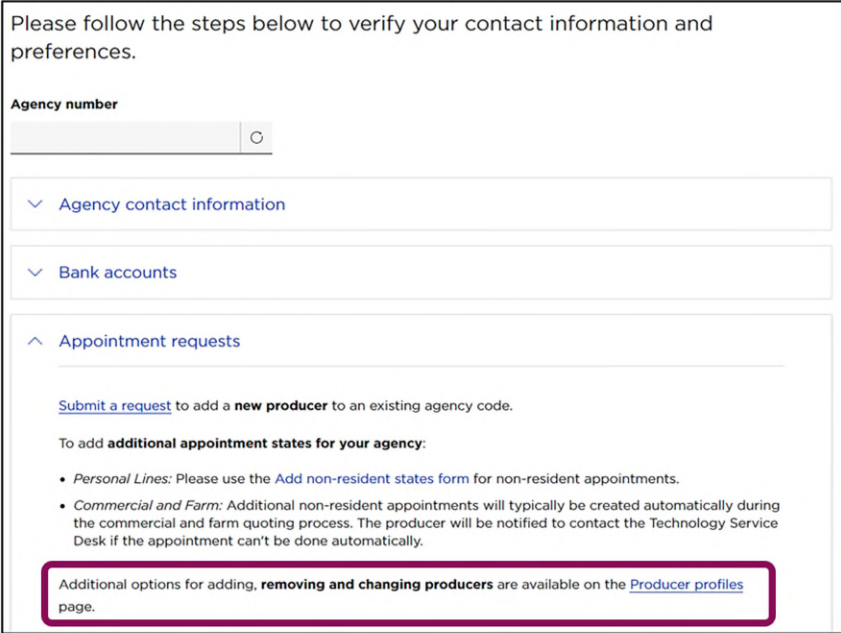


Note: These actions can only be performed by an Agent Center Administrator.

Step 1

Action	Screen
From Agent Center, choose the “Agency” tab and select “Agency Profile”.	

Step 2

Action	Screen
Within the “Appointment requests” section of Agency Profile, select “Producer profiles” page link.	



Step 3

Action

If needed, search for “Producer name” by selecting the “Filter” button.

Select “Terminate” under the “Actions” column.

Screen

[Home](#) / [Agency profile](#) / [Producer profiles](#)

Producer profiles

Select an action below to edit producer information or terminate a producer.

Agency number

Add producer

Filter by last name

Filter

Clear

Producer name ▾	Producer number ▾	Actions
PRODUCER	001	Edit Terminate Update PL print

Cancel

Action	Screen
<p>Select the "Termination reason" from the dropdown.</p>	<div><div>Agency profile / Producer profiles / Terminate producer</div><div><h3>Terminate producer</h3><p>Please select a termination reason and instructions for transferring any related policies.</p><div><div>Name: PRODUCER</div><div>Agency:</div><div>Producer number: 001</div><div>NPN:</div></div><div>Effective date ?<div>02/02/2024</div><div>(no weekends or holidays)</div></div><div><div>Termination reason</div><div><div>Select</div><div>Select</div><div>Agency request</div><div>Deceased</div><div>Retired</div><div>License not renewed</div></div></div><div><div>Cancel</div><div>Submit</div></div></div></div>



Action	Screen
<p>To move policies from that producer to you (or anyone else you choose as the producer) at renewal, select "Transfer book to" dropdown.</p> <p>Select "Submit".</p>	<div><div>Agency profile / Producer profiles / Terminate producer</div><div><h3>Terminate producer</h3><p>Please select a termination reason and instructions for transferring any related policies.</p><p>Name: PRODUCER</p><p>Agency:</p><p>Producer number: 001</p><p>NPN:</p><p>Effective date ?</p><div>02/02/2024</div><p>(no weekends or holidays)</p><p>Termination reason</p><div>Retired</div><p>Transfer book to</p><div>Select</div><div><div>Cancel</div><div>Submit</div></div></div></div>

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