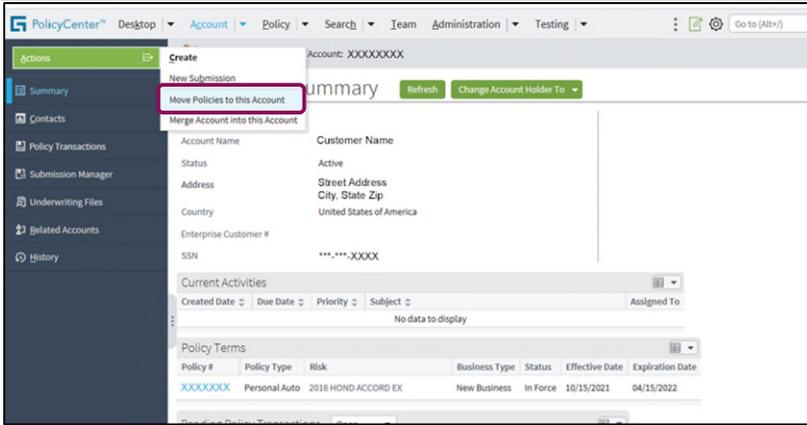
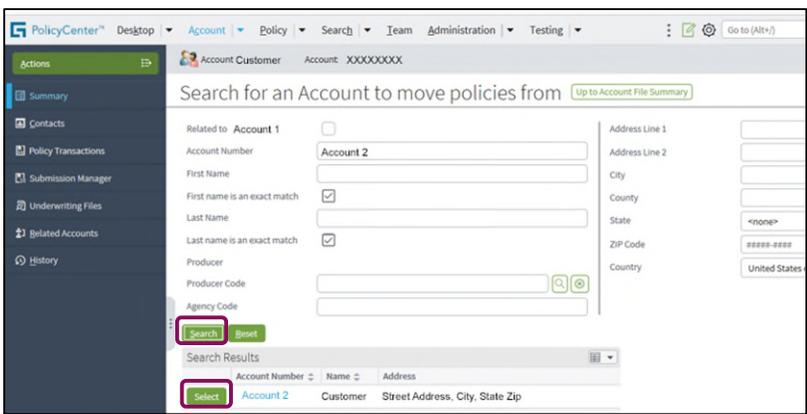
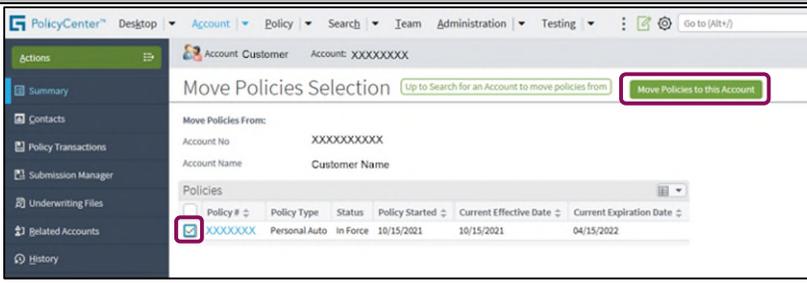


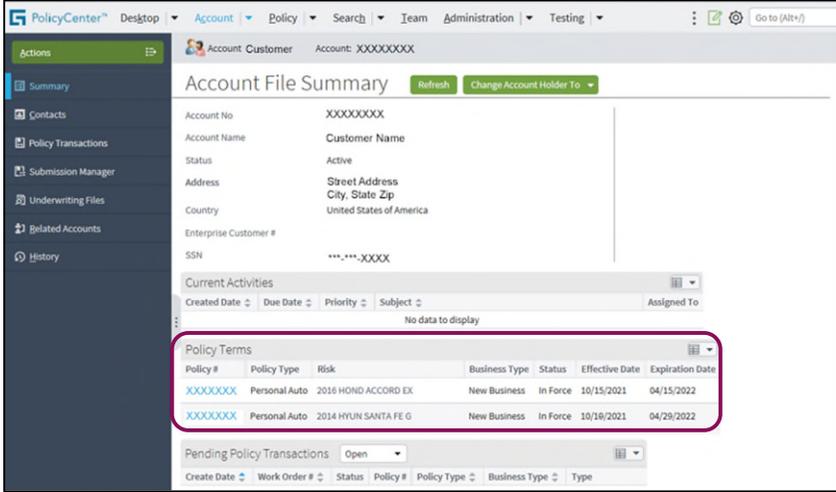
How to Move Policies from One Account to Another

Description

This job aid reviews how to move policies from one account to another account.

Step 1	
Action	Screen
<p>Navigate to the account which will contain all policies when the move procedure is complete:</p> <ul style="list-style-type: none"> Select the “Actions” button. Select “Move Policies to this Account” from the drop-down menu. 	
Step 2	
Action	Screen
<p>On the “Search for an Account to move policies from” screen:</p> <ul style="list-style-type: none"> Enter the “Account Number” from which you need to move policies. Select the “Search” button. <p>In the Search Results section:</p> <ul style="list-style-type: none"> Review the results. Select the “Select” button to the left of the “Account Number”. 	
Step 3	
Action	Screen
<p>On the “Move Policies Selection” screen:</p> <ul style="list-style-type: none"> Select the checkbox to the left of the policy you want to move to the account. Select the “Move Policies to this Account” button. 	

Step 4

Action	Screen																					
<p>The "Account File Summary" screen displays the original policies and the recently moved policy.</p>	 <p>The screenshot shows the 'Account File Summary' screen in PolicyCenter. The account number is XXXXXXXX. The account name is 'Customer Name'. The status is 'Active'. The address is 'Street Address, City, State Zip, United States of America'. The SSN is '***-**-XXXX'. Below the account details, there are sections for 'Current Activities' (No data to display), 'Policy Terms', and 'Pending Policy Transactions'. The 'Policy Terms' section is highlighted with a red box and contains two rows of policy data:</p> <table border="1"> <thead> <tr> <th>Policy #</th> <th>Policy Type</th> <th>Risk</th> <th>Business Type</th> <th>Status</th> <th>Effective Date</th> <th>Expiration Date</th> </tr> </thead> <tbody> <tr> <td>XXXXXXXX</td> <td>Personal Auto</td> <td>2016 HOND ACCORD EX</td> <td>New Business</td> <td>In Force</td> <td>10/15/2021</td> <td>04/15/2022</td> </tr> <tr> <td>XXXXXXXX</td> <td>Personal Auto</td> <td>2014 HYUN SANTA FE G</td> <td>New Business</td> <td>In Force</td> <td>10/16/2021</td> <td>04/29/2022</td> </tr> </tbody> </table>	Policy #	Policy Type	Risk	Business Type	Status	Effective Date	Expiration Date	XXXXXXXX	Personal Auto	2016 HOND ACCORD EX	New Business	In Force	10/15/2021	04/15/2022	XXXXXXXX	Personal Auto	2014 HYUN SANTA FE G	New Business	In Force	10/16/2021	04/29/2022
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