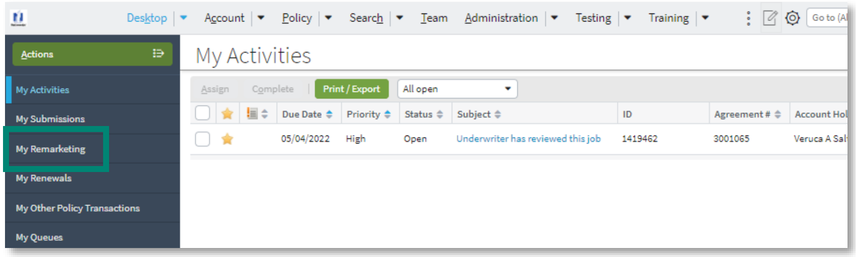
Issue a Remarketing Submission

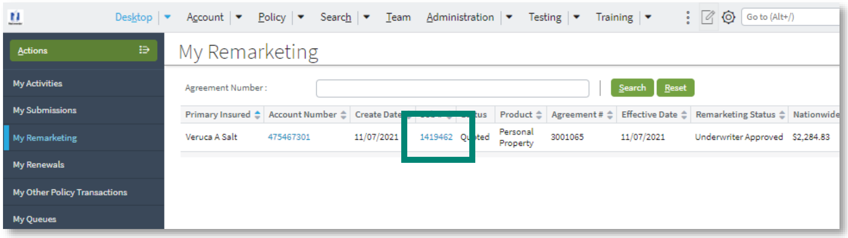
Background:
A Remarketing Processor creates a remarketing submission and sends it to the Agent for review. An Agent must review the submission then decide whether to issue the policy.

Description:
This job aid describes the step-by-step process how to issue a Remarketing submission.

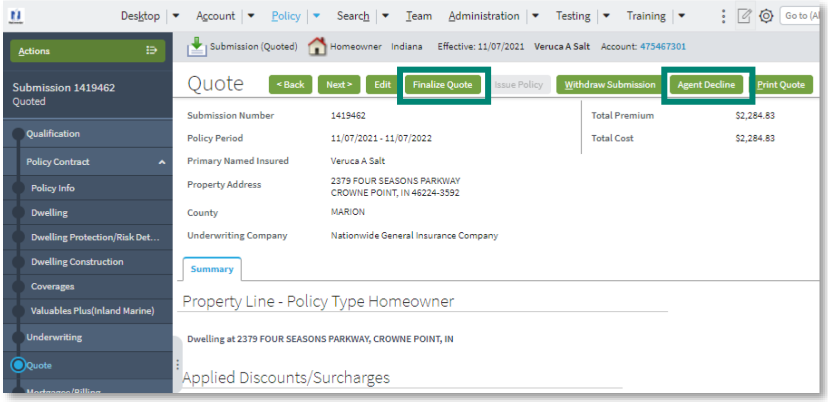
Step 1

Action	Screen
On the *Desktop* screen: • Click the **My Remarketing** link in the left Nav bar.	

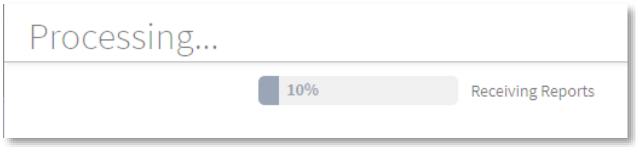
Step 2

Action	Screen
On the *My Remarketing* screen. • Click the Job # link for the remarketed policy to process.	

Step 3

Action	Screen
On the *Quote* screen: Review the remarketing submission, then verify if the member would like to move forward with this submission. If the member does not want to move forward with the submission, click the **Agent Decline** button. If the member does want to move forward with the submission, click the **Finalize Quote** button. In this example, the member would like to move forward with the remarketing property submission. Click the **Finalize Quote** button. Click the **OK** button on the confirmation pop-up window.	

Step 4

Action	Screen
Clicking the **Finalize Quote** button orders the MVR report for Auto submissions and places the submission in *Binding* status. After binding the policy, if no incidents are found on the report, you can advance to the *Payment* screen, enter the billing information, and issue the policy. If discrepancies are found in the reports, the bind process stops, and a review of the report is required, allowing you to take the appropriate action. After resolving any discrepancies, you must quote and finalize the quote again, before moving to the *Payment* screen and issuing the policy. The system displays a progress bar as a visual cue of running validations report ordering. Once validations are complete, the system automatically displays the *Payment* screen. **Note:** If a validation or report fails, PolicyCenter continues to display a validation message, warning, or Underwriting rule on the impacted screen.	

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Step 5

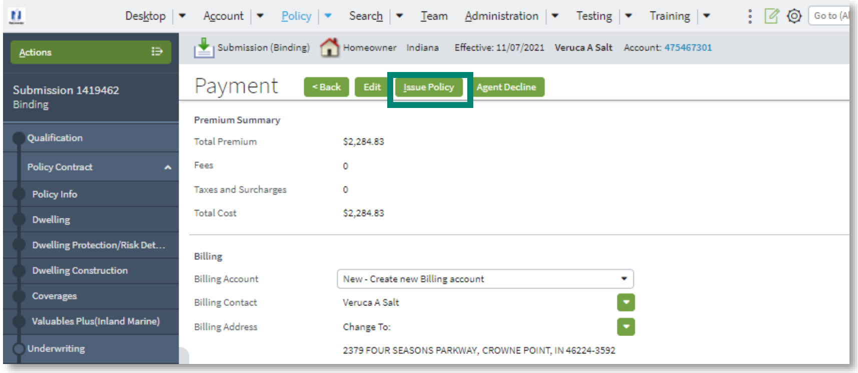
Action	Screen

On the *Payment* screen:

Complete the required billing information. Required fields include:

- **Installment Plan** selection
- **Day of the Month** (defaults to the Effective Date of the submission)
- **Bill Delivery Preference**
- **Paperless Billing Consent**
- **Email Address** (if **Paperless Billing Consent** is chosen)

- Click the **Issue Policy** button.
- Click the **OK** button on the confirmation pop-up window.



Step 6

Action	Screen

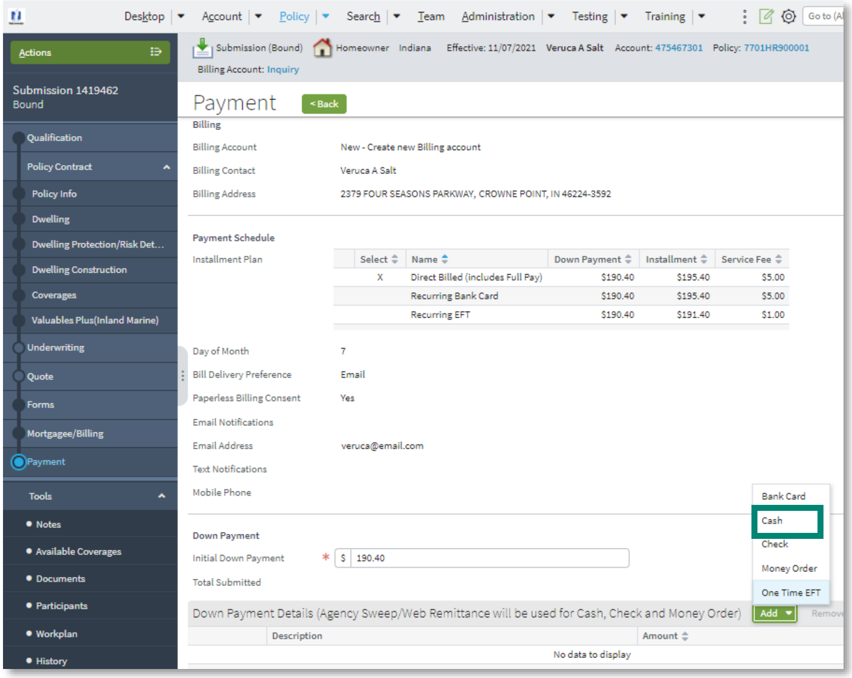
Next, complete the *Down Payment Details* information. The Initial Down Payment is the amount which must be submitted for down payment. You may need to scroll down to the bottom of the *Payment* screen to locate the *Down Payment* section.

- Click the **Add** button.

  Note: You may add up to four down-payment methods.

- In this example, select **Cash** from the drop-down list.

  Note: In certain circumstances, like Billing to a 3rd Party Mortgagee or adding the policy to an existing billing account, a down payment is not required. However, it is recommended to accept a down payment when possible.



Step 7

Action

In the *Payments Details* section:

- Review the down payment details and adjust as necessary.
- Enter the down payment amount in the **Amount** field.
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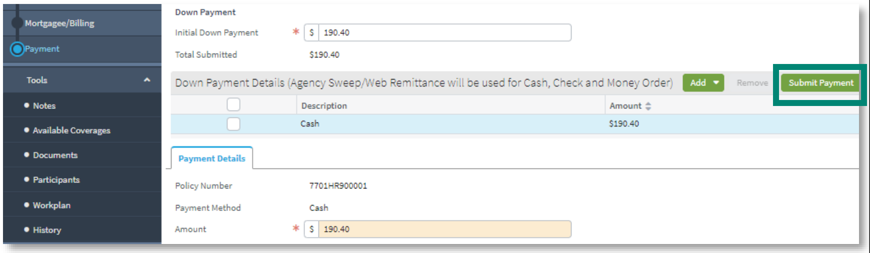
- Click the **Submit Payment** button.

Screen



Step 8

Action

The *Submission Bound* screen displays. This indicates the submission is bound, the Billing Account successfully created, and the down payment accepted.

Screen