Make a Change during the Renewal Process - Auto

In Brief

In this Quick Card, you will make a change to a policyholder's exisiting auto policy during the renewal process before the Work Order is bound.
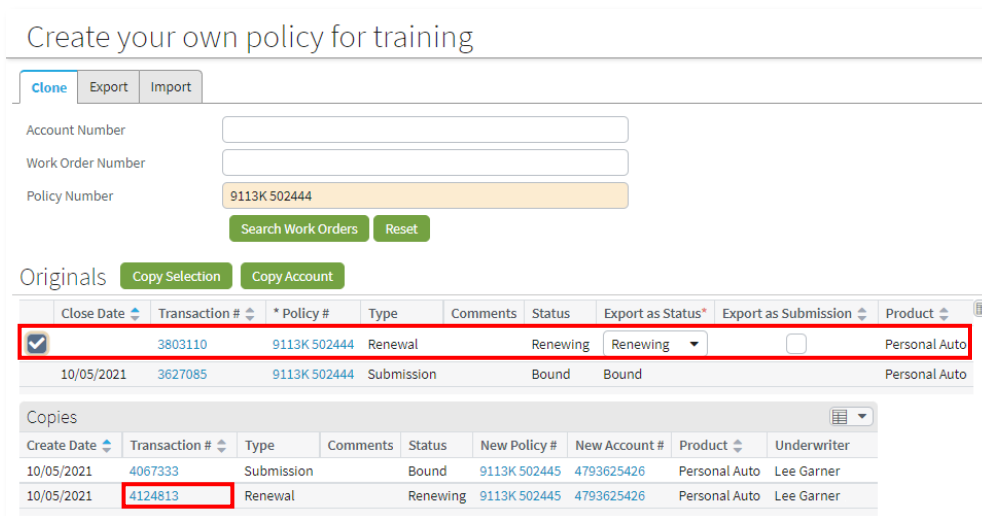
Log in to the VTO using the appropriate generic user account from the **VTO Information Guide** document.

Quick Card

IMPORTANT: This is a test environment. These cloning steps are ONLY used in the VTO.

Clone the Submission

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 502444" in the **Policy Number** field exactly as it is shown, including spaces and capital letters.
3. Click the **Search Work Orders** button.
4. In the *Originals* section, click the checkbox to the left of the **Renewal** Policy Transaction Type for the submission being cloned. In this example, select the checkbox to the left of Transaction # 3803110.

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 **Transaction #** column for the Renewal policy.

IMPORTANT: PolicyCenter automatically created a **New Account #**. The new account is linked to the *cloned* policy transaction and policy, not the original account.

Policy Info screen

8. Click the **Edit** button.
9. Click the **OK** button on the *Editing this policy transaction will invalidate the current quote and may reqire re-approval by underwriting. Are you sure you want to continue?* pop-up window.
10. Click the **Coverages** link.

Coverages screen

IMPORTANT: This is a test environment. There might be exisiting Policy Transactions on the policy. If the recommended changes have already been made to the Policy Transaciton you may make a different change, or make no changes.

11. In the *Policy-level Coverages* section, ensure the **Roadside Assistance option** displays **Plus**
12. In the *Features* section, select the following checkboxes:
    -
    - **Vanishing Deductible**
    - **Total Loss Ded Wavier**

13. Click the **Quote** button.

NOTE: PolicyCenter displays the message, *"Renewal premium is estimated and subject to change based on changes to rating factors that may occur between now and the insurance of the renewal."*

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.

NOTE: If the **Renew** button is not selected, then changes will not be commited and the Work Order will not placed into *Renewing* status.

14. Click the **Renew** button.
15. Click the **OK** button.

Summary screen

16. Scroll down to the *Pending Policy Transactions* section.
17. Ensure the Transaction's status is "*Renewing*".