

# Rewrite/Transfer Auto Policy in PolicyCenter



## Description

This job aid outlines the high-level process an Agent would follow to complete a rewrite/transfer of an existing policy in PolicyCenter using the Rewrite/Transfer function.

The Rewrite/Transfer function can be used only on:

- Auto policies
- Bound policies
- Policies in all states

**Note:** Rewrites may require prior Underwriting approval.

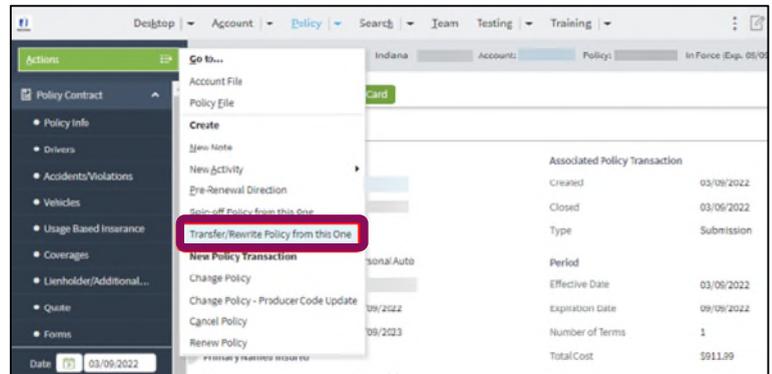
## Step 1

### Action

On the “Account File Summary” screen for the existing account:

- Select the “Actions” button.
- Select the “Transfer/Rewrite Policy from this One” in the drop-down list.

### Screen



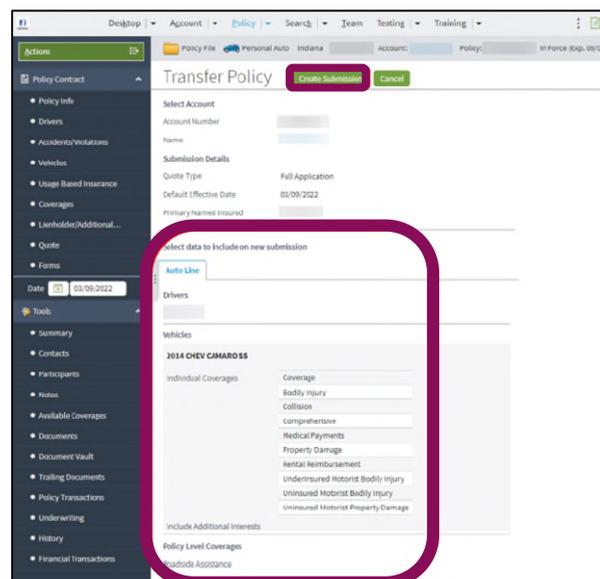
## Step 2

### Action

On the “Transfer Policy” screen:

- Verify the data.
- Select the “Create Submission” button.

### Screen



## Step 3

Action	Screen
<p>You have successfully created the new submission by transferring the policy data.</p> <ul style="list-style-type: none"> <li>Select the “View your submission...” link.</li> </ul>	

## Step 4

Action	Screen
<p>PolicyCenter displays the original policy in the “Transfer Source Policy” field.</p> <p>Complete the rest of the submission as you would for any new quote.</p> <p>Refer to the <b>Create Auto Full Application job aid</b> for step-by-step instructions for completing the new submission.</p>	

## Step 5

Action	Screen
<p>Once the Policy Rewrite is bound, you must return to the original policyholder Account to select the “old” policy and cancel it.</p> <p><b>Note:</b> If the existing policy is not cancelled, customers will have duplicate coverage and be billed for two policies.</p> <p>Refer to the <b>Cancel Policy job aid</b> for step-by-step instructions on how to cancel a policy.</p>	

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