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	Screen
On the "Account File Summary" screen for the existing account:	I Desigtop Account Palicy Search I Icam Testing Training Training Policy Inferce Exp. 05/02 Exp. 05/02 <l< td=""></l<>
Select the "Actions" button.	Policy Elie Policy Info Create Drivers Mem Note News 625107 Associated Policy Transaction
 Select the "Transfer/Rewrite Policy from this One" in the drop-down list. 	Academic violations Eyre Renewal Direction Vehicles Solo off Policy from this One Created Ologe Based Insurance Transfer/Rewrite Policy from this One
	Coverages New Policy Transaction Sonal Auto Period Lenholder/Additional Change Policy Canage Policy Canage Policy Canage Policy Canage Policy Canage Policy Canage Policy Sonal Auto Period Effective Date O3/06/2022 Un/2022 Explosion Date O9/06/2022 Sonal Auto Policy Canage Policy Policy Sonal Auto Period Effective Date O3/06/2022 Sonal Auto Policy Canage Policy Policy Sonal Auto Period Effective Date O3/06/2022 Sonal Auto Policy Canage Policy Policy Sonal Auto Period Effective Date O3/06/2022 Sonal Auto Policy Canage Policy Policy Sonal Auto Period Effective Date O3/06/2022 Sonal Auto Policy Effective Date O3/06/2022 Sonal Auto Period Policy Sonal Sonal
	Date 17 03/09/2022 TotalCost 5911.99

Step 2

ActionScreenOn the "Transfer Policy" screen:.• Verify the data.Image: Create Submission" button.• Select the "Create Submission" button.Image: Create Submission " create Submission" create Submission " create Submission" button.

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Step 3 Action Screen You have successfully created the new Desgtop + Account + Policy - Search + Team Testing + Training + <u>n</u> : 2 submission by transferring the policy data. Policy Fie 🚓 Personal Auto Indiana 🛛 Account: Policy: In Force (Exp. 09) Transfer Policy Complete Policy Contract • Select the "View your submission..." Your Policy has been transferred. Policy Info link. Vic • D idents/Violation Step 4 Action Screen PolicyCenter displays the original policy in Ð Account + Policy + Search + Jeam Testing + Training + Deskton | + the "Transfer Source Policy" field. Submission (Pending) 💏 Personal Auto Indiana Effective: 03/09/2022 Policy Info Next> Quote Wthdraw Submission Complete the rest of the submission as Address has been validated. Primary Named Insu you would for any new quote. Change To: **Policy Details** hame Term Type 100-000-0000 10 Number of Term * 1 **Policy Address** Change To: • Effective Date * 03/09/2022 Refer to the Create Auto Full Backstate Reason * Application job aid for step-by-step er of Backdate Day County Expiration Date 09/09/2022 instructions for completing the new usiness Type submission. Secondary Named Insured Cive Privacy, Credit Report + O Yes No and Insurance Score Notice? Discounts Easy Pay Sign Up Yes No iotice Acceptance Property Product Step 5 Action Screen Once the Policy Rewrite is bound, you must return to the original policyholder Account to select the "old" policy and cancel it. **Note:** If the existing policy is not cancelled, customers will have duplicate coverage and be billed for two policies. Refer to the **Cancel Policy job aid** for step-by-step instructions on how to cancel a policy.

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