

## Make a Change during the Renewal Process - Property

### In Brief

In this Quick Card, you will make a change to a policyholder's existing Property policy during the renewal process before the Work Order is bound.

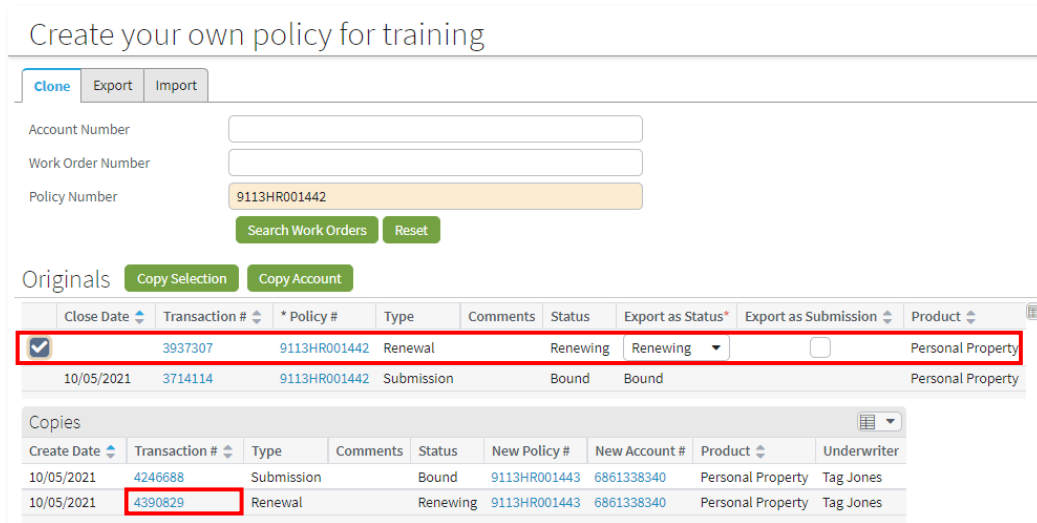
Log in to the [VTO](#) using the appropriate generic user account from the [VTO Information Guide](#) document.

### 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 "**9113HR001442**" 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 #**3937307**.



Create your own policy for training

Clone Export Import

Account Number

Work Order Number

Policy Number

Search Work Orders Reset

Originals Copy Selection Copy Account

Close Date	Transaction #	* Policy #	Type	Comments	Status	Export as Status*	Export as Submission	Product
10/05/2021	3937307	9113HR001442	Renewal		Renewing	Renewing	<input type="checkbox"/>	Personal Property
10/05/2021	3714114	9113HR001442	Submission		Bound	Bound		Personal Property

Copies

Create Date	Transaction #	Type	Comments	Status	New Policy #	New Account #	Product	Underwriter
10/05/2021	4246688	Submission		Bound	9113HR001443	6861338340	Personal Property	Tag Jones
10/05/2021	4390829	Renewal		Renewing	9113HR001443	6861338340	Personal Property	Tag Jones

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 Work Order Type.

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

### Coverages screen

**IMPORTANT:** There might be existing Policy Transactions on the policy. If the recommended changes have already been made to the Policy Transaction you may make a different change, or make no changes.

11. In the *Section I Coverages* section:
  - Select “2,500” from the **Wind & Hail** drop-down list.
  - Select the checkbox to the left of **Better Roof Replacement**.
  - Select the checkbox to the left of **Water Backup Limited**.
  - Select “25,000” from the **Water Backup Limited** drop-down list.
12. In the *Section II Coverages* section, Select “300,000” from the **Personal Liability** drop-down list.
13. Click the **Quote** button.
14. Click the **OK** button.

**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.

### Quote screen

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

15. Click the **Renew** button.
16. Click the **OK** 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.”*



***Summary screen***

17. In the *Pending Policy Transaction* section, the Policy Transaction's status is "Renewing".