

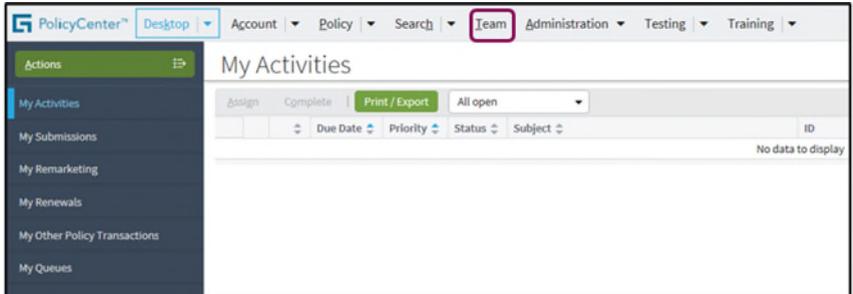


# How to Reassign Renewals from the Team tab

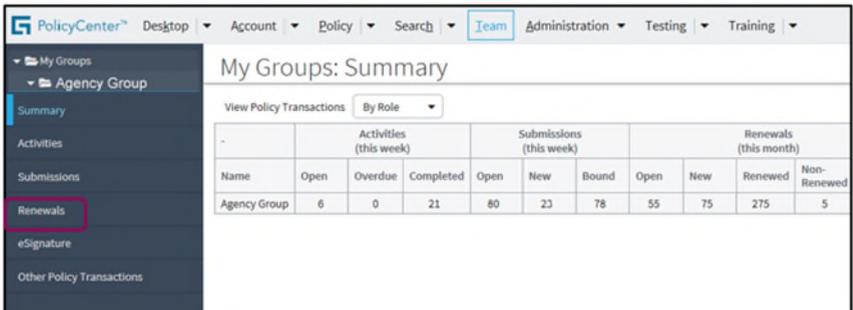
## Description

This job aid describes how to reassign renewals from the “Team” tab. You must have the role of Office Manager to be able to complete this action.

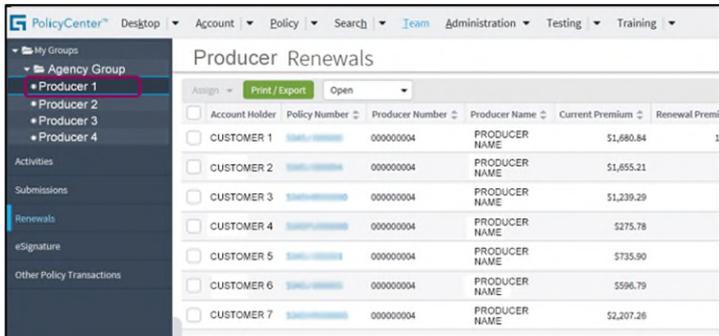
## Step 1

Action	Screen
<p>On the “Desktop” screen:</p> <ul style="list-style-type: none"> <li>Select the “Team” tab.</li> </ul>	

## Step 2

Action	Screen
<p>On the “My Groups: Summary” screen:</p> <ul style="list-style-type: none"> <li>Select the “Renewals” link.</li> </ul>	

## Step 3

Action	Screen
<p>On the “My Groups: Renewals” screen:</p> <ul style="list-style-type: none"> <li>Expand the “Agency Group” folder item, in the left navigation panel, and select the producer currently assigned to the renewals.</li> </ul>	

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## Step 4

### Action

All renewals currently assigned to the selected producer display.

- Select the checkbox to the left of everyone you wish to reassign.

### Screen

Account Holder	Policy Number	Producer Number	Producer Name	Current Premium	Renewal Premium
<input type="checkbox"/>	CUSTOMER 1	000000004	PRODUCER NAME	\$1,680.84	
<input checked="" type="checkbox"/>	CUSTOMER 2	000000004	PRODUCER NAME	\$1,655.21	
<input checked="" type="checkbox"/>	CUSTOMER 3	000000004	PRODUCER NAME	\$1,239.29	
<input type="checkbox"/>	CUSTOMER 4	000000004	PRODUCER NAME	\$275.78	
<input type="checkbox"/>	CUSTOMER 5	000000004	PRODUCER NAME	\$735.90	
<input type="checkbox"/>	CUSTOMER 6	000000004	PRODUCER NAME	\$596.79	
<input type="checkbox"/>	CUSTOMER 7	000000004	PRODUCER NAME	\$2,207.26	

## Step 5

### Action

With the desired individuals selected:

- Select the "Assign" button.
- Select "Producer" from the drop-down list.

### Screen

Type	Transaction or policy #	Producer	Name	Current Premium	Renewal Premium
Auditor		000000004	PRODUCER NAME	\$1,680.84	
Initial Referrer		000000004	PRODUCER NAME	\$1,655.21	
Loss Control		000000004	PRODUCER NAME	\$1,239.29	
Pre-Renewal Owner		000000004	PRODUCER NAME	\$275.78	
Processor		000000004	PRODUCER NAME	\$735.90	
Related user		000000004	PRODUCER NAME	\$596.79	
Requestor		000000004	PRODUCER NAME	\$2,207.26	
Underwriter		000000004	PRODUCER NAME		
Underwriter Assistant		000000004	PRODUCER NAME		
Underwriting Technician		000000004	PRODUCER NAME		

## Step 6

### Action

Search for the producer to be reassigned the renewals. You may use any combination of the "User Name", "First Name", and "Last Name" fields to locate the desired producer or select the "Search" button to view all users in the group.

- Select the "Search" button.

### Screen

Reassigning role: Producer for these Items.

Type: Transaction or policy # | Producer

Renewal: XXXXXXXX | Name

Renewal: XXXXXXXXXX | Name

User Name:

First name:

Last name:

**Search**

User | Group | Parent Group

No data to display

## Step 7

Action	Screen
<p>In this example, the system locates and displays all producer(s) in the group.</p> <ul style="list-style-type: none"> <li>Select the “Assign” button to the left of the appropriate producer.</li> </ul>	

## Step 8

Action	Screen																																				
<p>The renewals selected are reassigned to the selected producer.</p> <p>Notice the renewals no longer display under the originally assigned producer.</p>	<table border="1"> <thead> <tr> <th>Account Holder</th> <th>Policy Number</th> <th>Producer Number</th> <th>Producer Name</th> <th>Current Premium</th> <th>Renewal Premium</th> </tr> </thead> <tbody> <tr> <td>CUSTOMER 1</td> <td>XXXXXXXXXX</td> <td>000000004</td> <td>PRODUCER NAME</td> <td>\$1,680.84</td> <td></td> </tr> <tr> <td>CUSTOMER 4</td> <td>XXXXXXXXXX</td> <td>000000004</td> <td>PRODUCER NAME</td> <td>\$275.78</td> <td></td> </tr> <tr> <td>CUSTOMER 5</td> <td>XXXXXXXXXX</td> <td>000000004</td> <td>PRODUCER NAME</td> <td>\$735.90</td> <td></td> </tr> <tr> <td>CUSTOMER 6</td> <td>XXXXXXXXXX</td> <td>000000004</td> <td>PRODUCER NAME</td> <td>\$596.79</td> <td></td> </tr> <tr> <td>CUSTOMER 7</td> <td>XXXXXXXXXX</td> <td>000000004</td> <td>PRODUCER NAME</td> <td>\$2,207.26</td> <td></td> </tr> </tbody> </table>	Account Holder	Policy Number	Producer Number	Producer Name	Current Premium	Renewal Premium	CUSTOMER 1	XXXXXXXXXX	000000004	PRODUCER NAME	\$1,680.84		CUSTOMER 4	XXXXXXXXXX	000000004	PRODUCER NAME	\$275.78		CUSTOMER 5	XXXXXXXXXX	000000004	PRODUCER NAME	\$735.90		CUSTOMER 6	XXXXXXXXXX	000000004	PRODUCER NAME	\$596.79		CUSTOMER 7	XXXXXXXXXX	000000004	PRODUCER NAME	\$2,207.26	
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## Step 9

Action	Screen																		
<p>On the “My Groups: Renewals” screen:</p> <ul style="list-style-type: none"> <li>Select the producer in the “Agency Group” folder item in the left navigation panel, who was reassigned the renewals. The list now includes the reassigned renewals.</li> </ul>	<table border="1"> <thead> <tr> <th>Account Holder</th> <th>Policy Number</th> <th>Producer Number</th> <th>Producer Name</th> <th>Current Premium</th> <th>Renewal Premium</th> </tr> </thead> <tbody> <tr> <td>CUSTOMER 2</td> <td>XXXXXXXXXX</td> <td>000000004</td> <td>PRODUCER NAME</td> <td>\$1,680.84</td> <td></td> </tr> <tr> <td>CUSTOMER 3</td> <td>XXXXXXXXXX</td> <td>000000004</td> <td>PRODUCER NAME</td> <td>\$1,655.21</td> <td></td> </tr> </tbody> </table>	Account Holder	Policy Number	Producer Number	Producer Name	Current Premium	Renewal Premium	CUSTOMER 2	XXXXXXXXXX	000000004	PRODUCER NAME	\$1,680.84		CUSTOMER 3	XXXXXXXXXX	000000004	PRODUCER NAME	\$1,655.21	
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