

# 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>	<p>The screenshot shows the PolicyCenter interface. The left sidebar has a dark blue background with white text. The 'Renewals' link is highlighted with a red rectangle. The main content area has a white background. At the top, there is a navigation bar with the PolicyCenter logo and several dropdown menus. Below the navigation bar, the title 'My Groups: Summary' is displayed. Underneath the title, there is a section titled 'View Policy Transactions' with a 'By Role' dropdown menu. Below this, there is a table with columns for 'Name', 'Activities (this week)', 'Submissions (this week)', and 'Renewals (this month)'. The table has one data row for 'Agency Group'.</p> <table><thead><tr><th rowspan="2">Name</th><th colspan="3">Activities (this week)</th><th colspan="3">Submissions (this week)</th><th colspan="4">Renewals (this month)</th></tr><tr><th>Open</th><th>Overdue</th><th>Completed</th><th>Open</th><th>New</th><th>Bound</th><th>Open</th><th>New</th><th>Renewed</th><th>Non-Renewed</th></tr></thead><tbody><tr><td>Agency Group</td><td>6</td><td>0</td><td>21</td><td>80</td><td>23</td><td>78</td><td>55</td><td>75</td><td>275</td><td>5</td></tr></tbody></table>	Name	Activities (this week)			Submissions (this week)			Renewals (this month)				Open	Overdue	Completed	Open	New	Bound	Open	New	Renewed	Non-Renewed	Agency Group	6	0	21	80	23	78	55	75	275	5
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## 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>	<table><thead><tr><th>Assign</th><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><input type="checkbox"/></td><td>CUSTOMER 1</td><td>0000000004</td><td>0000000004</td><td>PRODUCER NAME</td><td>\$1,680.84</td><td></td></tr><tr><td><input type="checkbox"/></td><td>CUSTOMER 2</td><td>0000000004</td><td>0000000004</td><td>PRODUCER NAME</td><td>\$1,655.21</td><td></td></tr><tr><td><input type="checkbox"/></td><td>CUSTOMER 3</td><td>0000000004</td><td>0000000004</td><td>PRODUCER NAME</td><td>\$1,239.29</td><td></td></tr><tr><td><input type="checkbox"/></td><td>CUSTOMER 4</td><td>0000000004</td><td>0000000004</td><td>PRODUCER NAME</td><td>\$275.78</td><td></td></tr><tr><td><input type="checkbox"/></td><td>CUSTOMER 5</td><td>0000000004</td><td>0000000004</td><td>PRODUCER NAME</td><td>\$735.90</td><td></td></tr><tr><td><input type="checkbox"/></td><td>CUSTOMER 6</td><td>0000000004</td><td>0000000004</td><td>PRODUCER NAME</td><td>\$596.79</td><td></td></tr><tr><td><input type="checkbox"/></td><td>CUSTOMER 7</td><td>0000000004</td><td>0000000004</td><td>PRODUCER NAME</td><td>\$2,207.26</td><td></td></tr></tbody></table>	Assign	Account Holder	Policy Number	Producer Number	Producer Name	Current Premium	Renewal Premium	<input type="checkbox"/>	CUSTOMER 1	0000000004	0000000004	PRODUCER NAME	\$1,680.84		<input type="checkbox"/>	CUSTOMER 2	0000000004	0000000004	PRODUCER NAME	\$1,655.21		<input type="checkbox"/>	CUSTOMER 3	0000000004	0000000004	PRODUCER NAME	\$1,239.29		<input type="checkbox"/>	CUSTOMER 4	0000000004	0000000004	PRODUCER NAME	\$275.78		<input type="checkbox"/>	CUSTOMER 5	0000000004	0000000004	PRODUCER NAME	\$735.90		<input type="checkbox"/>	CUSTOMER 6	0000000004	0000000004	PRODUCER NAME	\$596.79		<input type="checkbox"/>	CUSTOMER 7	0000000004	0000000004	PRODUCER NAME	\$2,207.26	
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# How to Reassign Renewals from a Team tab (2 of 3)

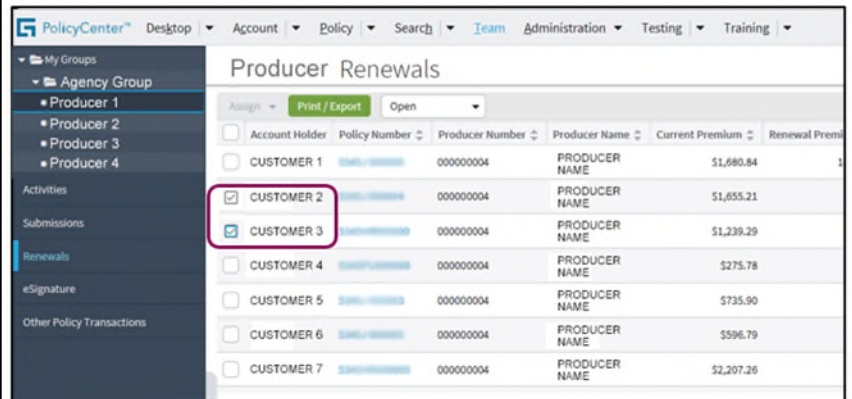
## Step 4

### Action

All renewals currently assigned to the selected producer display.

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

### Screen



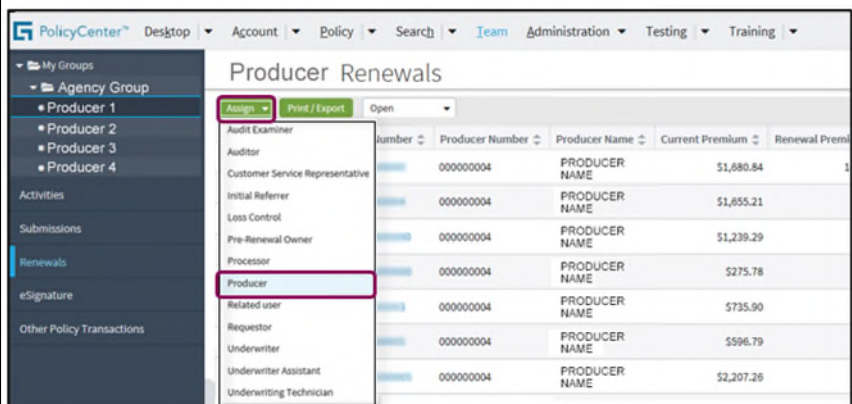
## Step 5

### Action

With the desired individuals selected:

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

### Screen



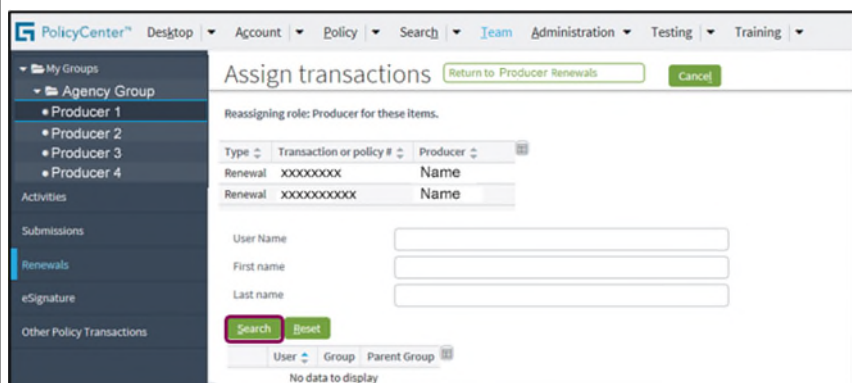
## Step 6

### 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



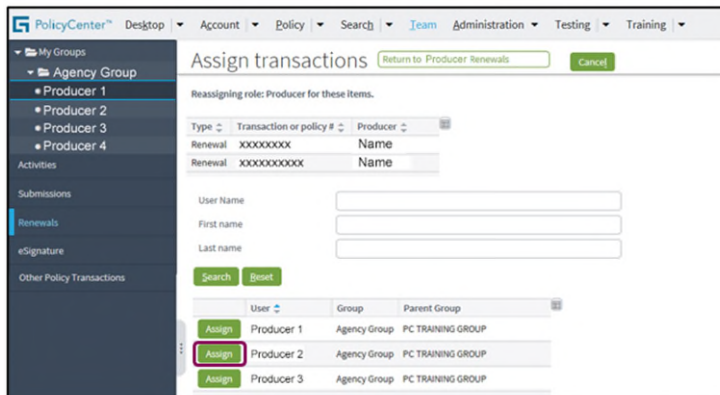
## Step 7

### Action

In this example, the system locates and displays all producer(s) in the group.

- Select the “Assign” button to the left of the appropriate producer.

### Screen



## Step 8

### Action

The renewals selected are reassigned to the selected producer.

Notice the renewals no longer display under the originally assigned producer.

### Screen

PolicyCenter™

Desktop

Account

Policy

Search

Team

Administration

Testing

Training

My Groups

Agency Group

- Producer 1
- Producer 2
- Producer 3
- Producer 4

Activities

Submissions

Renewals

eSignature

Other Policy Transactions

Assign

Print / Export

Open

<input type="checkbox"/>	Account Holder	Policy Number	Producer Number	Producer Name	Current Premium	Renewal Premium
<input type="checkbox"/>	CUSTOMER 1	<a href="#">Link to Renewal</a>	000000004	PRODUCER NAME	\$1,680.84	
<input type="checkbox"/>	CUSTOMER 4	<a href="#">Link to Renewal</a>	000000004	PRODUCER NAME	\$275.78	
<input type="checkbox"/>	CUSTOMER 5	<a href="#">Link to Renewal</a>	000000004	PRODUCER NAME	\$735.90	
<input type="checkbox"/>	CUSTOMER 6	<a href="#">Link to Renewal</a>	000000004	PRODUCER NAME	\$596.79	
<input type="checkbox"/>	CUSTOMER 7	<a href="#">Link to Renewal</a>	000000004	PRODUCER NAME	\$2,207.26	

## Step 9

### Action

On the “My Groups: Renewals” screen:

- 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.

### Screen

PolicyCenter®

Desktop

Account

Policy

Search

Team

Administration

Testing

Training

My Groups

Agency Group

- Producer 1
- Producer 2
- Producer 3
- Producer 4

Activities

Submissions

Renewals

Producer 2 Renewals

Assign

Print / Export

Open

<input type="checkbox"/>	Account Holder	Policy Number	Producer Number	Producer Name	Current Premium	Renewal Premium
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