

Change Renter's Location Address

In Brief

In this Quick Card, you will change a renter's location address on a Property Tenant policy.

In this example, a policyholder is moving to a new rental location. You will add the new address on the *Policy Info* screen and select it as her new renter's location on the *Dwelling* screen.

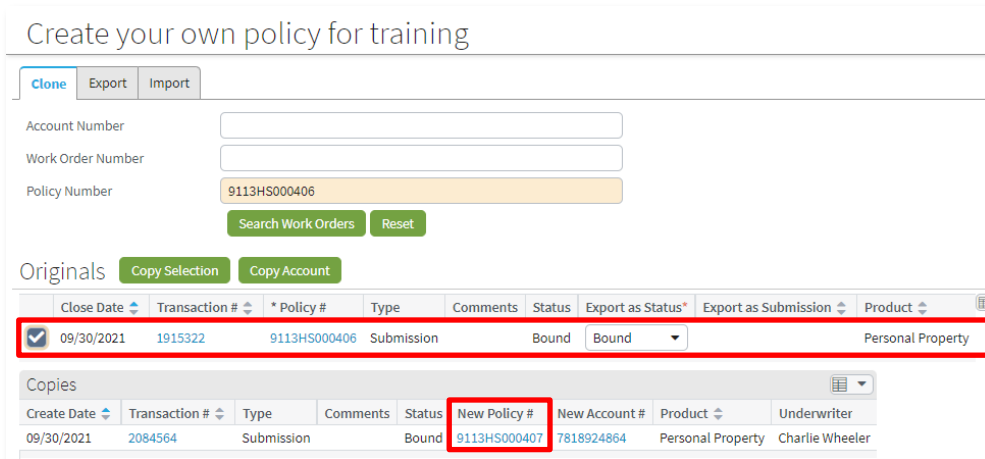
Log in to the [VTO](#) using the appropriate generic user account from the **VTO Information Guide** document.

Quick Card

IMPORTANT: This is a test environment. The next seven (7) steps are ONLY used in the VTO.

Clone the Policy

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 list.
2. Enter "**9113HS000406**" 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 **Submission** Transaction Type for the policy being cloned. In this example, select the checkbox to the left of Transaction # **1915322**.



Create your own policy for training

Clone Export Import

Account Number

Work Order Number

Policy Number 9113HS000406

Search Work Orders Reset

Originals Copy Selection Copy Account

Close Date	Transaction #	* Policy #	Type	Comments	Status	Export as Status*	Export as Submission	Product
09/30/2021	1915322	9113HS000406	Submission		Bound	Bound		Personal Property

Copies

Create Date	Transaction #	Type	Comments	Status	New Policy #	New Account #	Product	Underwriter
09/30/2021	2084564	Submission		Bound	9113HS000407	7818924864	Personal Property	Charlie Wheeler

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 **New Policy #** column.

IMPORTANT: PolicyCenter automatically created a **New Account #**. The new account is linked to the *cloned* policy, not the original. The cloned policy opens on the policy *Summary* screen.

Summary screen

8. Click the **Actions** button.
9. Select "**Change Policy**" from the drop-down list.

Start Policy Change screen

10. PolicyCenter defaults the **Effective Date** to the current system date. If necessary, you can change the date to a future date. In this example, accept the current date.
11. Click the **Next >** button.

Policy Info screen

12. In the *Policy Address* section, click the down arrow to the right of **Change To:** field.
13. Select "**New Address**" from the drop-down list.

Address Details screen

14. Enter the information:
 - **Address Line 1:** 40 W Washington Blvd
 - **City:** Indianapolis
 - Click the down arrow in the **State** field.
 - Select "**Indiana**" from the drop-down list.
 - **ZIP Code:** 46224
15. Click the **OK** button.
16. Click the **Next >** button.

Dwelling screen

17. In the *Location Name* section, click the down arrow to the right of the **Location Name** field.
18. Select "**New Address**" from the drop-down list.

Location Information screen

19. Update and enter the information:
 - **Address Line 1:** 40 W Washington Blvd
 - **City:** Indianapolis
 - **ZIP Code:** 46224
20. Click the **OK** button.



Dwelling screen

21. Click the **Quote** 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

22. Click the **Issue Change** button.
23. Click the **OK** button.

Policy Change Bound screen

PolicyCenter displays the message, *"Your Policy Change (#XXXX) has been bound."*