

Add and Change a Garaging Address

In Brief

In this quick card, you will add a garaging address on an Auto policy. After adding the address to the vehicle, you will change the address back to the original on the policy.

In this example, a policyholder, has requested a change in garaging address for her insured vehicle.

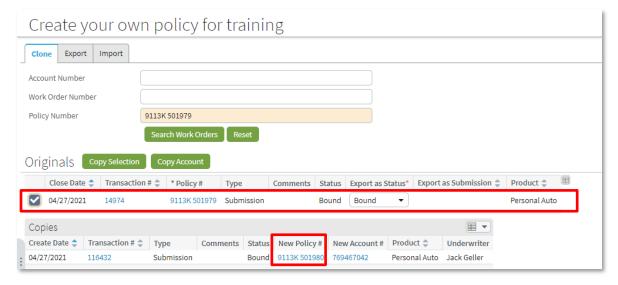
Log in to the <u>VTO</u> using the appropriate generic user account from the **VTO Information Guide** document.

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 menu.
- 2. Enter "9113K 501979" 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 #14974.





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.

Add a Garaging Address

Summary screen

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

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. Click the **Vehicles** link in the *Left Navigation Bar*.

Vehicles screen

NOTE: Be sure you have selected the vehicle you wish to update, from the **Vehicle Details** table.

- 13. On the Vehicle Details tab, in the Where Garaged section:
 - Click the green down arrow to the right of the Location Name field.
 - Select "New Location" from the drop-down menu.

IMPORTANT: The steps to Edit Location are the same as the New Location.

NOTE: The numbering of garaging addresses is for internal purposes only. Numbering discrepancies, if any, are NOT significant.

Location Information screen

- 14. In the *Location Details* section enter the information:
 - Address Line 1: 2379 FOUR SEASONS PARKWAY
 - City: CROWNE POINT
 - State: Select "Indiana" from the drop-down menu.
 - ZIP Code: 46224-3592



- 15. Click the OK button.
- 16. 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

- 17. Click the Issue Change button.
- 18. Click the **OK** button.

Policy Change Bound screen

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

Revert Garaging Address Back to Original

Submission Bound screen

19. Click the View your Policy (#XXXX) link to access the same policy that was used for "Add a Garaging Address".

Summary screen

- 20. Click the Actions button.
- 21. Select "Change Policy" from the drop-down menu.

Start Policy Change screen

- 22. 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.
- 23. Click the Next > button.

Policy Info screen

24. Click the Vehicles link in the Left Navigation Bar.

Vehicles screen

NOTE: Be sure you have selected the vehicle you wish to update, from the **Vehicle Details** table.

- 25. On the Vehicle Details tab, in the Where Garaged section:
 - Click the down arrow in the Location Name field.
 - Select the original location (40 W WASHINGTON BLVD) from the drop-down menu.



- 26. Click the **OK** button.
- 27. 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

- 28. Click the <u>Issue Change</u> button.
- 29. Click the **OK** button.

Policy Change Bound screen

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