

ProducerEngage | Policy Change

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Creating a Policy Change (Option 1)

1. When creating a **policy change**, search for the existing policy number by going to **Search for Policy, Billing, and Claim Details**.

SEARCH FOR POLICY, B	ILLING, AND CLAIM DETAILS	901 - HOME OFFICE AGENCY - MAILING -	
inter a customer name (e.g., Ja			
VIEW DOCUMENTS & FC	ORMS		Start Quote/Application
iew Your Client's Documents & ID C	ards		
Personal		Commercial	OTHER ACTIONS
Find Coverage Forms			
Personal	Commercial	Surety	View Replacement Cost Estimator
			Commercial Lines
👉 OTHER RESOURCES			View Quotes & Recent Activity
AutoPay / EFT Forms	Loss Control Resources	Personal Lines Advisor	View Agency Bill
Billing Plans	Loss Runs & Reports	Personal Lines Tools	Personal Lines
Bulletins	Marketing Materials	Scholarship	Endorse / Change a Policy
Dance (113	Planteening Platenats	Schotership	View Quotes & Recent Transactions
	More Resources		

2. Enter the **policyholder's name** and click **Search**.

3. Results will display below, when it is a **Select Auto** or *Signature Auto* policy, **the account number will start with A**.

4. Click on the arrow on the right side.

Policyholder: Sam Johes			Search	
2 results				
312 2nd St SE,				>
Samir Jones				>
	2 results Sam Jones A 312 2nd St SE, Samir Jones A	2 results Sam Jones <u>A930038138</u> 312 2nd St SE, Cresco, IA, 52136-2042	2 results Sam Jones <u>A930038138</u> 312 2nd St SE, Cresco, IA, 52136-2042 Samir Jones <u>A930037875</u>	2 results Sam Jones <u>A930038138</u> 312 2nd St SE, Cresco, IA, 52136-2042 Samir Jones <u>A930037875</u>

5. Select the policy by **clicking on the arrow** on the right side or clicking on the **account number**.

DLICIES SUMMARY		
POLICIES		
POLICIES		
POLICIES Personal Auto 9300044478		

6. This will bring you to the **Policy Detail** screen. You can start your change by selecting **Change Policy**.

POLICY DETAIL	
Personal Auto 9300044478 Active	
Eff. Date: 01/28/22 Exp. Date: 07/28/22	Insured By: Agency: 901
Report a Claim 6	
Policy Actions <u>Change Policy</u> <u>Copy to New Quote</u> <u>Cancel Policy</u> View: <u>Activites Notes Attachments</u>	

Creating a Policy Change (Option 2)

- 1. Select View Quotes & Recent Transactions.
- 2. Click on Select and Signature Auto.

				×	Start Quote/Application
	View Quotes & Rec	ent Transactio	ns		
2	Select & Signatu	ire Auto	Other		🔒 OTHER ACTIONS
Co	j Select & Signature	e Auto is for new a	outo policies in IA and N	MN only.	View Replacement Cost Estimator
					Commercial Lines
					View Quotes & Recent Activity
		_			View Agency Bill
is Coi	ntrol Resources	Persona	al Lines Advisor		Personal Lines
oss R	uns & Reports	Persor	nal Lines Tools		Endorse / Change a Policy
larke	ting Materials	S	cholarship	1-	View Quotes & Recent Transactions

This will bring you to the **Policies** page.

3. Search for the policyholder by name or policy number.

Policies Everything	v	•							
• The 20 most recently viewed trans	sactions are displa	yed, please expar	nd search by transa	action number or	name as needed.				
CATEGORY Policies (1)	Search Policy	y Number or Name	e Q	-3					
STATUS	Product ~	Status v	Policy Number ~	Account V	Named Insured V	Premium v	Effective Date 🗸	Expiration Date	×
STATUS	Product ~ Personal Auto	Status v	Policy Number v	Sam Jones	Named Insured V	Premium ~ \$496.00	Effective Date ~ 01/28/2022	Expiration Date	•
								[

Printing a Policy Change

Policy Summary - On this page, you can **print** a copy of the Auto Policy Change Request.

- 1. Click on Select All and Print Selected, or
- 2. Put a check in the box next to the document and click on Print Selected.
- 3. Click on Submit Change.

Policy Changes	ACCOUNT: SAM JONES Policy Auto(9300044495) - Po	olicy Change 9300046280 o	Duoted	Delete
Policy Details Drivers	POLICY INFORMATION			
Vehicles Coverages Vehicle Driver Assignment	Policy Change Effective Date Policy Period Total Premium	01/28/2022 01/28/2022 - 07/28/2022 \$476.00		
Incidents and Reports	PRIMARY INSURED CONTACT DETAILS	;		
Quote	Name	Sam Jones		
Policy Summary	Phone Number Email Address	517-371-7732		71
<u>My Underwriter</u>	DOCUMENTS		Select All Prin	nt Selected Send via Email
<u>Upload Attachments</u> <u>Copy Submission</u> <u>Create a Homeowner Quote</u>	Auto Policy Change Request			-2
View Coverage Forms	Save & Exit		Previo	bus Submit Change

Policy Change Summary - This page shows the finalized policy change.

Account Number	A930038138
Policy Number	9300044495
Transaction Number	9300046280
Policy Holder Name	Sam Jones
Policy Type	Personal Auto
Policy Period	01/28/2022 - 07/28/2022
Change Effective Date	01/28/2022
Policy Total Cost	\$476.00
Change In Cost	-\$20.00
	LS
Primary Insured Name	Sam Jones
Primary Insured Name Phone Number	Sam Jones 5173717732

Note: An amended declaration will be available the following day on *AgentsOnline*, and if you need a copy right away, your Underwriting Assistant can send the amended declaration.

I started a Policy Change, how do I get back to it?

If you are looking for a change you have already started, use the following steps.

- 1. Select View Quotes & Recent Transactions.
- 2. Click on Select and Signature Auto.

View Quotes & Reco	ant Transactions	×	Start Quote/Application
view Quotes & Reco	ent fransactions		
2 - Select & Signatu	re Auto Other		OTHER ACTIONS
Select & Signature	Auto is for new auto policies in IA and MN	l only.	
Commercial	Surety		View Replacement Cost Estimator
			Commercial Lines
			View Quotes & Recent Activity
			View Agency Bill
s Control Resources	Personal Lines Advisor		ar south
			Personal Lines
oss Runs & Reports	Personal Lines Tools		Endorse / Change a Policy
larketing Materials	Scholarship	1-	View Quotes & Recent Transactions

- 3. On the **Policies** page change the **Category** from **Policies** to **Change**.
- **4. Search** by **Transaction Number** (which is different than the policy number) or **Name**.
- **5.** Click on the **Transaction number** to go into the **Policy Change**.

Policies	9	v			
The 30 most recently v	viewed transactions are display	red, please expand search by	rtransaction (
CATEGORY	Search Transaction	Search Transaction Number or Name Q			
O Policies (16)	Created ~	Product ~	Transa		
O Quotes (30)	06/16/2022	Personal Auto	00000		
Renewal (0)	08/24/2022	Personal Auto	00000		
OChange (4)	05/05/2022	Personal Auto	00000		
STATUS	02/14/2022	Personal Auto	00000		
Bound					
Withdrawn					

Policy Details

1. Select the **Effective Date** of the change.

2. Then you can select the link below to jump to the page you need to make your change. Example: Add a driver – select **Change Driver**. To increase a coverage limit - select **Change Coverages**.

WESTERN NATIONAL INSURANCE AGENTSONLINE	Search by name, addre	is, or number Q		+ Start New Quote Welco
Policy Changes	ACCOUNT: SAM JONES Policy Auto(9300044495)			
Policy Details Drivers	POLICY DETAILS		0	
Vehicles	Effective Date *	01/28/2022	,	Ē
Coverages Vehicle Driver Assignment	Policy Effective Date Policy Expiration Date	01/28/2022 07/28/2022		
Incidents and Reports Quote Policy Summary	Select a link below to jump directly to: • <u>Change Policy Details</u> • <u>Change Driver</u> • <u>Change Vehicle</u>	-2		
	Change Additional Interest Change Coverage			

Change Driver - Driver's page

1. Select **Add Driver** to add a new driver to the policy.

Policy Changes		ACCOUNT: SAM JONES Policy Auto(9300044495) - Policy Change 9300046280 Draft							Delete
Policy Details									
Drivers	DRIVERS	DRIVERS/HOUSEHOLD MEMBERS							Add Driver
Vehicles									
Coverages	□ ~	∨ Driver# ∨ Name ∨ Date of Birth ∨ Gender ∨ Relationship ∨ Licensed ∨						Rated Driver 🗸	
Vehicle Driver Assignment	□ ⊘	1	Sam Jones	Apr 21, 1985	Female	Insured	Yes	Yes	View/Edit

2. Enter new driver information - do not forget to scroll down to answer license information and underwriting questions.

3		View/Edit
DRIVER / HOUSEHOLD MEMBER – CONTACT DETAILS		0
First Name *	Required for Quote	
Middle Name		
Last Name *	Required for Quote	
Suffix		~
Date of Birth *	M M / DD / YYYY	

3. To complete the change, select **Next** at the bottom of each screen until you get to the quote screen.

Policy Change - Quote - Underwriter referral

1. You can send a message to the Underwriter to review the issue by clicking on **Refer to Underwriter**.

Policy Changes	ACCOUNT: SAM JONES Policy Auto(9300044495) - Policy Change 9300046280 Quoted	Delete	
Policy Details Drivers	1 Item Requiring Underwriter Referral • MVR failed for Willow Jones		
Vehicles Coverages		Refer to Underwriter Multi-Versions	
Vehicle Driver Assignment Incidents and Reports	Premlum Summary Current Premlum: \$496.00	Policy Change Effective Date 01/28/2022	
Quote Policy Summary	Change in Premium -\$20.00 New Premium \$476.00	Policy Period 01/28/2022 - 07/28/2022	
My Underwriter	 This change will result in a premium decrease The new premium will be \$476.00, which is a decrease of -\$20.00. This change will be reflected in upcoming invoices. 		
Upload Attachments Copy Submission	POLICY CHANGES	~	

Policy Change – Quote

1. This screen outlines the **Premium Summary** and does a comparison of the policy changes from the existing policy to the New Changes. Select **Next**.

Policy Changes	ACCOUNT: SAM JONES Policy Auto(9300044495) - Policy Change 9300046280 Quoted	Delete	
Policy Details		Multi-Versions Print	
Drivers Vehicles Coverages Vehicle Driver Assignment Incidents and Reports	Premium Summary Current Premium: \$496.00 Change in Premium -\$20.00 New Premium \$476.00	 Policy Change Effective Date 01/28/2022 Policy Pariod 01/28/2022 - 07/28/2022 	
Quote Policy Summary	 This change will result in a premium decrease The new premium will be \$476.00, which is a decrease of -\$20.00. This change will be reflected in upcoming invoices. 		
	POLICY CHANGES	~	
My Underwriter Upload Attachments Copy Submission	Policy Information Written Date Privers	01/28/2022 02/11/2022	
Create a Homeowner Quote View Coverage Forms	Driver: Willow Jones Drivers	Added	
	Save & Exit	Previous Next e	