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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**.

The screenshot displays the ProducerEngage user interface. At the top, there is a search bar with the text "SEARCH FOR POLICY, BILLING, AND CLAIM DETAILS" and a "Search" button. Below the search bar, there are several sections: "VIEW DOCUMENTS & FORMS" with buttons for "Personal" and "Commercial"; "Find Coverage Forms" with buttons for "Personal", "Commercial", and "Surety"; and "OTHER RESOURCES" with buttons for "AutoPay / EFT Forms", "Loss Control Resources", "Personal Lines Advisor", "Billing Plans", "Loss Runs & Reports", "Personal Lines Tools", "Bulletins", "Marketing Materials", and "Scholarship". On the right side, there is a dropdown menu showing "901 - HOME OFFICE AGENCY - MAILING". Below the dropdown, there are two main sections: "WRITE NEW BUSINESS" with a "Start Quote/Application" button, and "OTHER ACTIONS" with buttons for "View Replacement Cost Estimator", "View Quotes & Recent Activity", "View Agency Bill", "Endorse / Change a Policy", and "View Quotes & Recent Transactions".

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.

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AGENTS ONLINE

Test message

Policyholder:
Sam Jones

2 results

Sam Jones **A930038138**
312 2nd St SE, Cresco, IA, 52136-2042

Samir Jones **A930037875**
1534 S Gilbert St Ste 300, Iowa City, IA, 52240

No more results

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

SAM JONES

312 2nd St SE, Cresco, IA, 52136-2042 | Account: A930038138

POLICIES SUMMARY

POLICIES

Personal Auto 9300044478 | Active

Total Premium: \$496.00 Eff Date: 01/28/22 Exp Date: 07/28/22

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

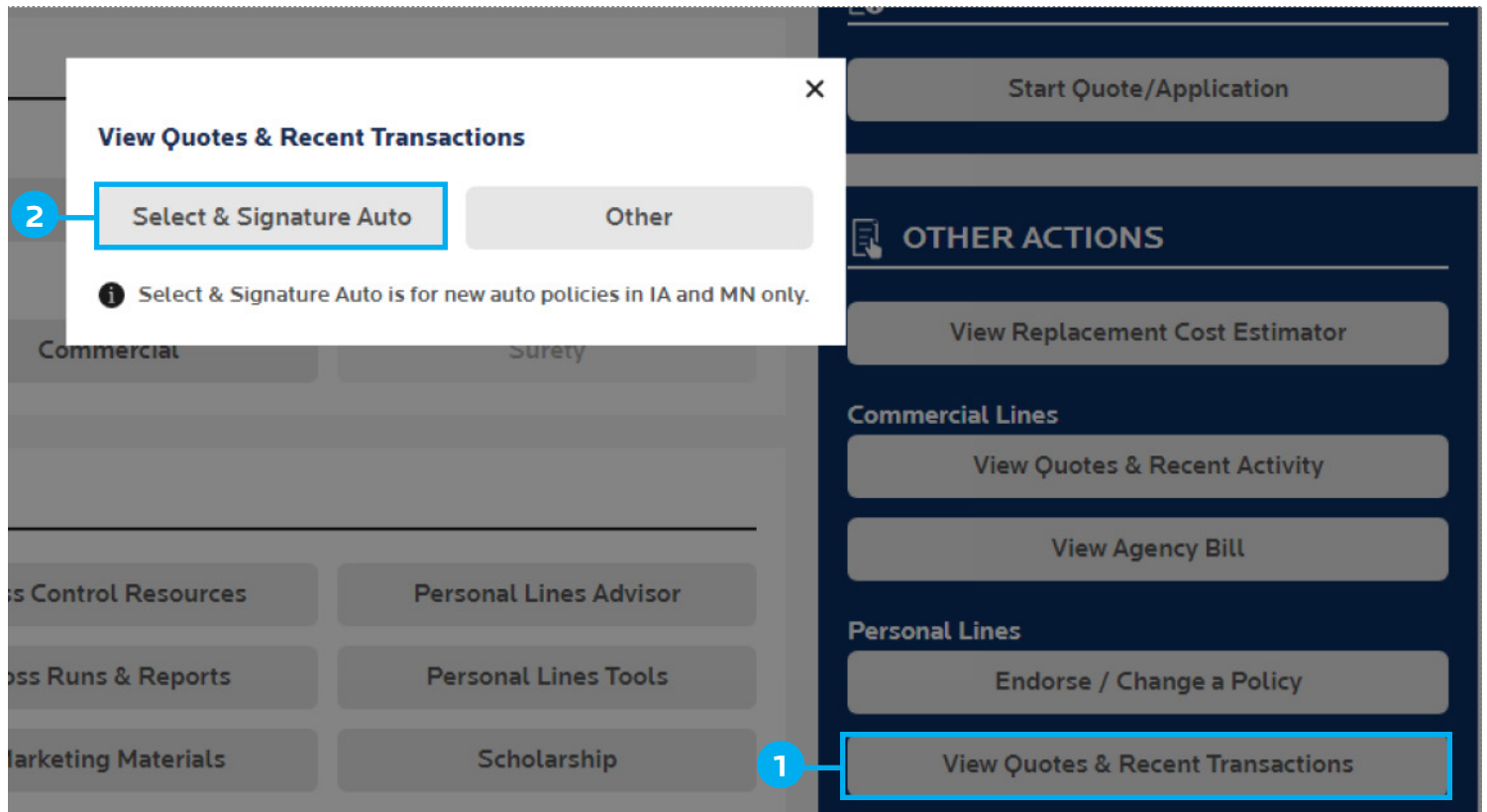
Eff. Date: 01/28/22 Exp. Date: 07/28/22 Insured By: Agency: 901

Report a Claim

Policy Actions: **Change Policy** | [Copy to New Quote](#) | [Cancel Policy](#)
View: [Activites](#) | [Notes](#) | [Attachments](#)

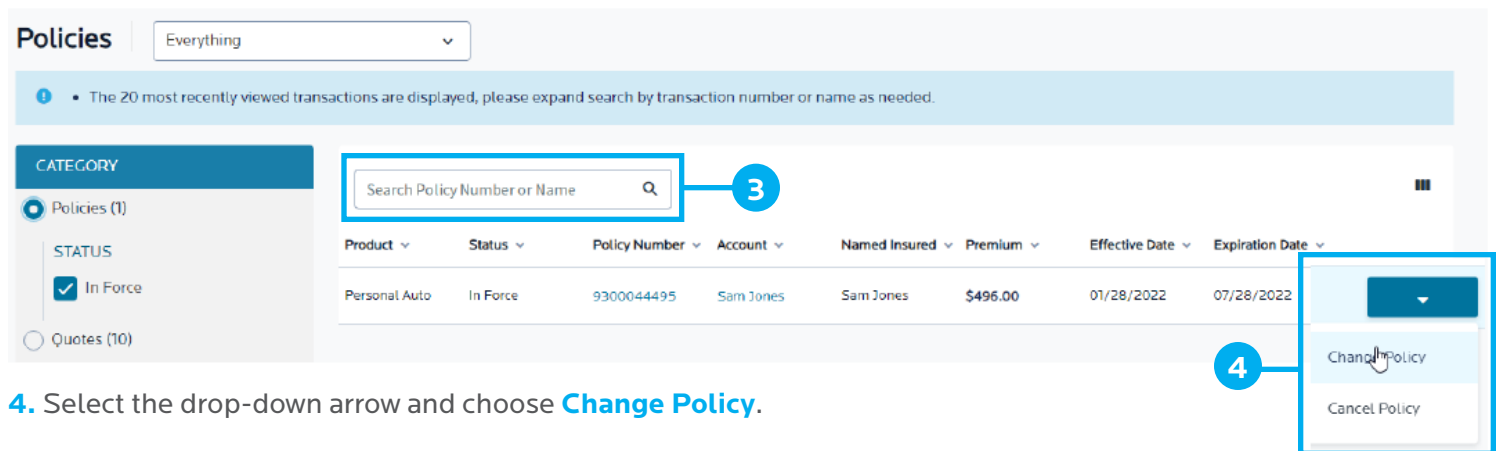
Creating a Policy Change (Option 2)

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



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

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



4. Select the drop-down arrow and choose **Change Policy**.

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) - Policy Change 9300046280 Quoted Delete

POLICY INFORMATION

Policy Change Effective Date: 01/28/2022
Policy Period: 01/28/2022 - 07/28/2022
Total Premium: \$476.00

PRIMARY INSURED CONTACT DETAILS

Name: Sam Jones
Phone Number: 517-371-7732
Email Address: -

DOCUMENTS

Auto Policy Change Request

Select All Print Selected Send via Email

Save & Exit Previous Submit Change

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

This policy has been changed.

POLICY CHANGE SUMMARY

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

CONTACT INFORMATION DETAILS

Primary Insured Name	Sam Jones
Phone Number	5173717732
Email Address	-

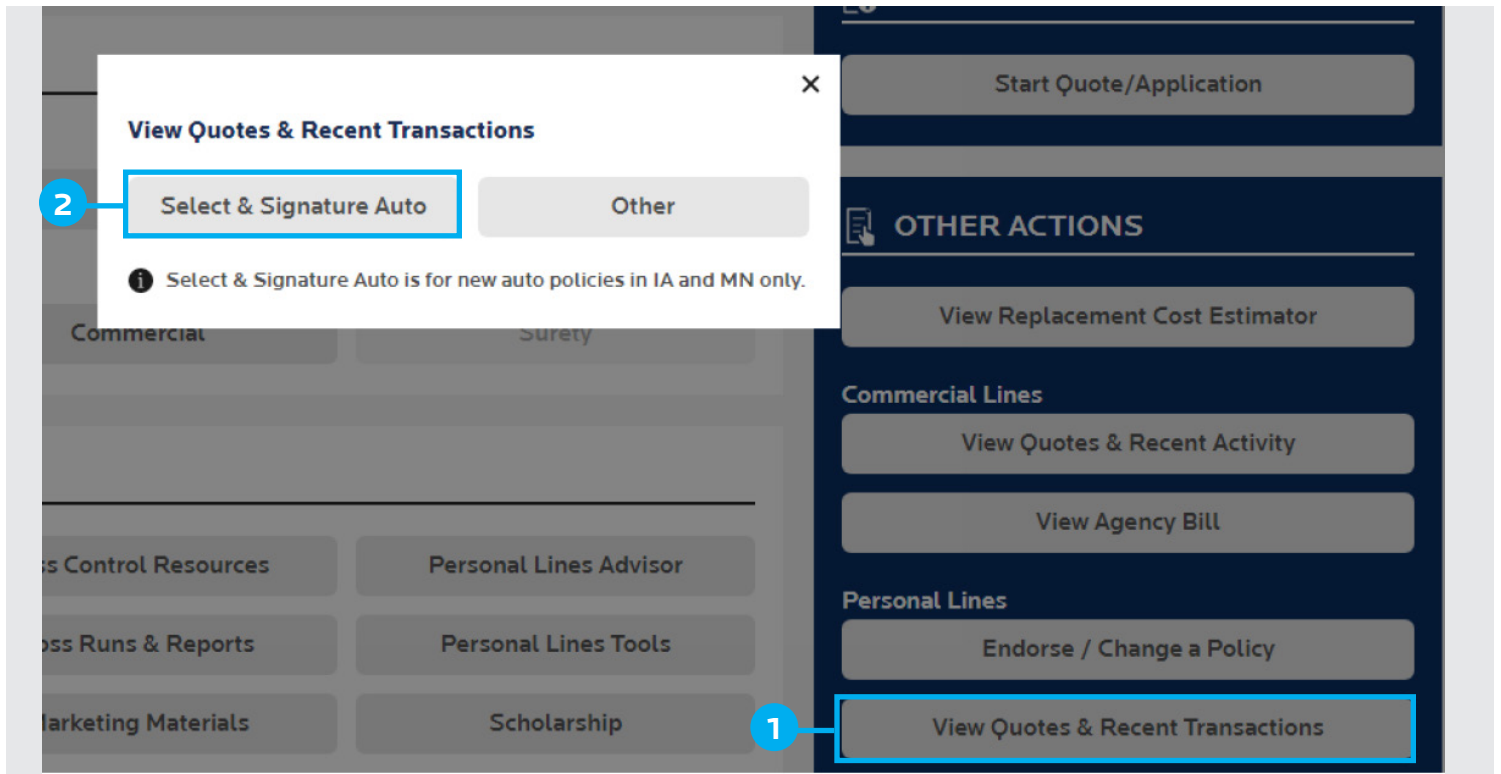
Next

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.

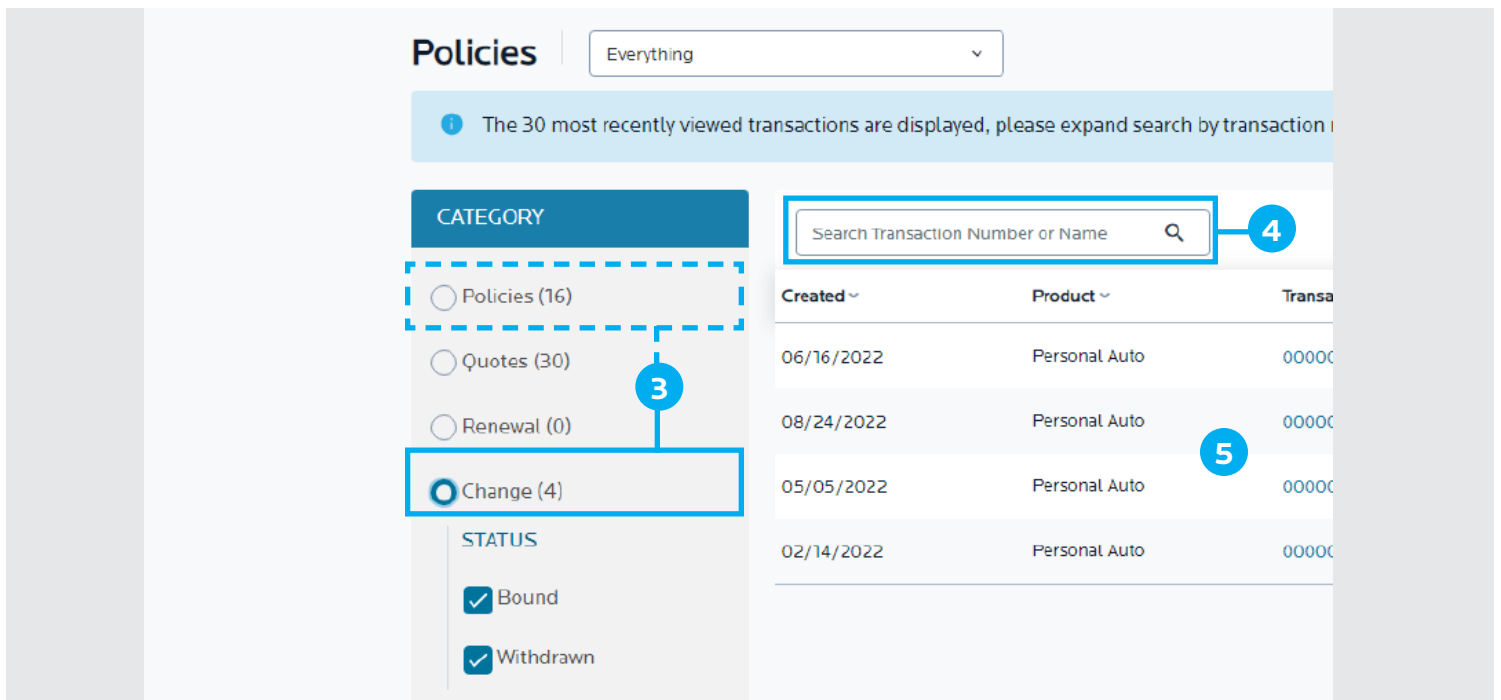
I started a Policy Change, how do I get back to it?

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**.



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**.



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, address, or number

+ Start New Quote Welco

ACCOUNT: SAM JONES
Policy Auto(9300044495)

POLICY DETAILS

Effective Date * 01/28/2022

Policy Effective Date 01/28/2022

Policy Expiration Date 07/28/2022

Select a link below to jump directly to:

- Change Policy Details
- Change Driver
- Change Vehicle
- Change Additional Interest
- Change Coverage

Change Driver - Driver's page

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

ACCOUNT: SAM JONES
Policy Auto(9300044495) - Policy Change 9300046280 Draft

Delete

DRIVERS/HOUSEHOLD MEMBERS

Delete Selected Add Driver

<input type="checkbox"/>	Driver#	Name	Date of Birth	Gender	Relationship	Licensed	Rated Driver	
<input checked="" type="checkbox"/>	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

First Name * -- Required for Quote --

Middle Name

Last Name * -- Required for Quote --

Suffix

Date of Birth * MM/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](#).

ACCOUNT: SAM JONES
Policy Auto(9300044495) - Policy Change 9300046280 Quoted Delete

1 Item Requiring Underwriter Referral

- MVR failed for Willow Jones

1 [Refer to Underwriter](#)

[Multi-Versions](#) [Print](#)

Premium Summary	
Current Premium:	\$496.00
Change in Premium	-\$20.00
New Premium	\$476.00

1 Policy Change Effective Date
01/28/2022

1 Policy Period
01/28/2022 - 07/28/2022

1 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

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](#).

ACCOUNT: SAM JONES
Policy Auto(9300044495) - Policy Change 9300046280 Quoted Delete

[Multi-Versions](#) [Print](#)

Premium Summary	
Current Premium:	\$496.00
Change in Premium	-\$20.00
New Premium	\$476.00

1 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

Policy Information

Written Date: 01/28/2022 - 02/11/2022

Drivers

Driver: Willow Jones Added

Drivers

[Save & Exit](#)
Driver: Willow Jones

[Previous](#) [Next](#) **1**