

# Policy - Cancel a Policy

font size

| [Print](#)

## Overview:

With the help of the Policy Express module, we have simplified the process of canceling a policy by via a wizard interface. With the introduction of Policy Express we have added the ability to create a follow up item as well as the ability to create the Cancellation Request/Policy Release (Acord 35). This document will walk you through the process or canceling a policy via the Policy Express module.

## Process:

From Policy Express Select **Automated Procedures -> Cancel Policy**.

Enter the appropriate cancellation transaction code. (*Typically CAN*)

Select the date of cancellation. This will create a policy sequence effective and expiration date of the cancellation. It will also change the policy term expiration date to the date of the cancellation.

Select **Create Acord 35** to have the system automatically create the Acord form.

To automatically create a todo item, select the appropriate date and add the desired description and notes.

*To disable creating the suspense item deselect **Create Suspense**.*

Select **Ok**

If the Acord 35 form was created it will automatically open and allow for changes. After the changes are complete select **Save** and close the form.

Test Name 1231 - 9898989814 - Policy Express

Create Item  
View Existing Items  
Automated Procedures

Batch Print  
Endorse Policy  
Renew Policy  
Cancel Policy  
Change Policy Number  
Move to New Client  
Charge Fee  
Policy View

9898989814  
Dwelling Fire written with Policy Main Company  
Policy Term 09/15/2011 through 09/15/2012  
Renewal Business is effective 09/15/2011  
Department Personal Lines  
Producer Don Carl Smith

Transaction  Cancellation

Cancel Date  ▼

Create Acord 35

Policy Description

Create Suspense   ▼

Suspense Description

Policy Log

**Published in** [Policy / Client Service](#)

**Tagged under** [Cancel](#) [Policy Express](#)

Related items (by tag)

[Policy - Reinstate a Policy](#)

[Policy - Convert Quote to a Policy](#)

[Batch Print - Print or Email Memos, Acord forms, and other Attachments](#)

[Policy - Policy Express Overview](#)

[Policy - Renew a Policy](#)

[back to top](#)