

# Policy - Rewrite a Policy

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## Overview:

**Policy Express** has simplified the process of rewriting a policy by using Automated Procedures. This document will outline the process.

## Before You Begin:

The policy must exist in the system. To create a new policy see [Policy - Create a Policy](#).

## Process:

1. Load the Client on one of the four **Client Tabs**.
2. **Left Click** the **Policy Number** listed under **Active Policies**. (If the Policy is expired, select the **Policy Tab** at the **bottom**, then **Right Click** on the expired Policy number and select **Policy Express**)
3. Select **Automated Procedures -> Renew Policy**.
4. Enter the Rewrite **policy number**. The operator can check the **Auto Number** box if the policy number has not been assigned by the carrier or if the rewrite policy is being entered as a **submission** first.
5. Enter the **Transaction Code** for Rewrite or Renewal. (Typically **REN**. If Rewrite is not configured as a renewal type, it can be changed later)
6. Select **Policy Type -> Policy or Submission**.
7. Enter the **Effective** and **Expiration** Date of the Rewrite.
8. **Optional Items:**
  - Enter a **Policy Tag** description for the **Policy Transaction**.
  - Select **Bring Forward Attachments** to copy all attached items to the new policy or submission.
  - Select **Create Suspense** to automatically create a follow up **ToDo** item with the Description and log provided.

Sample Client - CPK246810 - 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  
Convert Quote/Binder  
Policy View

CPK246810  
Business Auto written with Aetna Insurance Co.  
Policy Term 04/01/2010 through 04/01/2011  
New Business is effective 04/01/2010  
Department Commercial Lines  
Producer Don Carl Smith

Policy PK13579  Auto number   
Transaction Code **REW Rewrite**   
Policy Type Policy  
Effective Date 04/01/2011 To 04/01/2012  
Policy Tag **Rewriting Policy #CPK246810**  
 Bring Forward Attachments  
Create Suspense  04/18/2011  
Description  
Policy Log

9. Select **Next**.
10. Select any **ACORD forms** to copy to the new policy or submission. Select **Next**.
11. Select **Create Item -> Invoice**.
12. Change the **Transaction Code** to Rewrite if not used in step 5. Change the company to the new **company code**, and **invoice** normally.

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