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.

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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back to top