

Policy - Renew a Policy

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Overview:

The process outlined below steps a retail agency through the process of renewing a policy through **Policy Express**. The procedure allows for automatic **suspense** creation and **ACORD form** updates.

Before You Begin:

For MGA/Broker clients, See: [Policy - Renew a Policy in an MGA/Broker Agency](#).

Overview:

1. **Load the Client** on one of the four **Client Tabs**.
2. **Left Click** the Policy 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. Update the **Policy Number** if required.
5. Enter the renewal **Transaction Code**.
6. Enter the updated **Effective** and **Expiration** term dates.
7. **Optional Items:**
 - Enter a **Policy Tag** description for the **Policy Transaction**.
 - Select **Bring Forward Attachments** if changing the Policy Number.
 - Select **Create Suspense** to automatically create a follow up ToDo item.

8. Select **Next**. (Confirm **Yes** to confirm Policy Number not changing if required)
9. Select any **ACORD Forms** to update with the new term information. Select **Next**.
10. The updated ACORD Forms will be displayed, and the renewal process is completed.

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