



Apply Changes at Renewal

What

How to apply a policy change to a renewal.

Who

Agents

When

When a policy is 0 to 50 days prior to the renewal, agents processing a policy change on a current policy term might need to perform additional steps to ensure the change is applied to the renewal term.

Additional Resources

For more information on how to initiate a policy change, refer to the *Policy Changes* job aid, which is on the [Agent Training](#) pages of our website.

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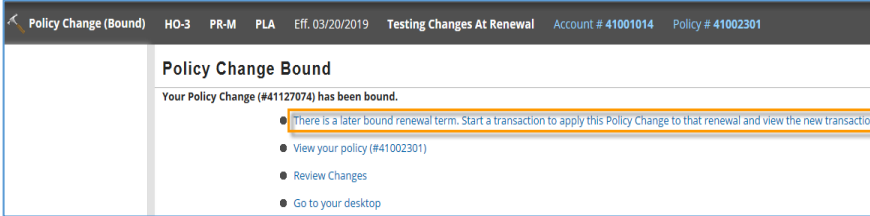
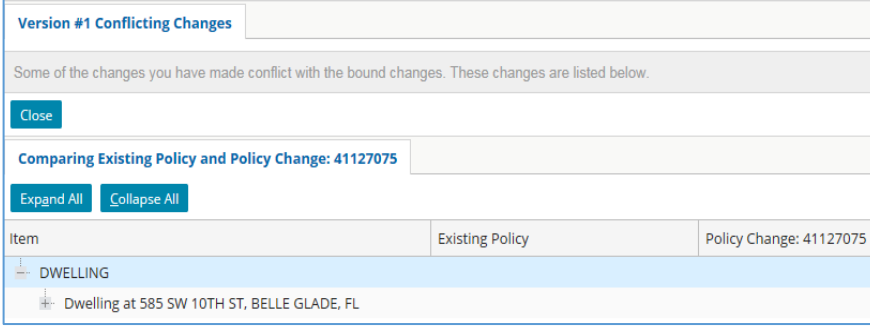


Apply Changes at Renewal, continued

Procedure

When completing a policy change on the current term, PolicyCenter® displays a hyperlink on the *Policy Change (Bound)* screen to alert agents that the policy needs additional processing steps to apply the change to the renewal term.

Follow the steps below to ensure the change is applied to the renewal term.

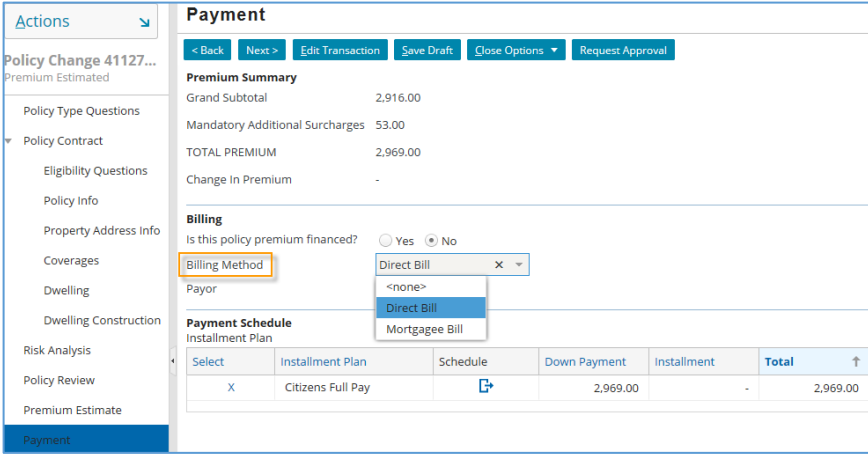
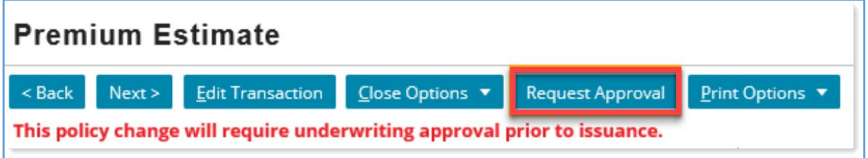
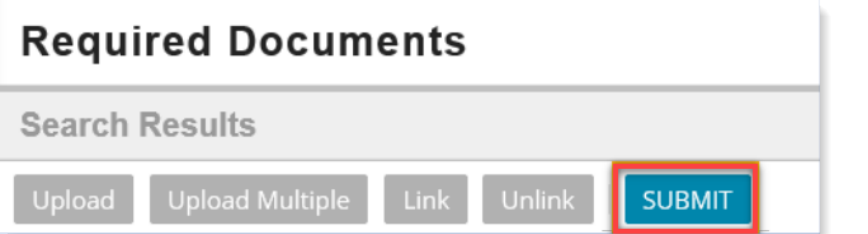
Step	Action
1	<p>On the <i>Policy Change Bound</i> screen, select the hyperlink that says <i>There is a later unbound renewal term. Apply this Policy Change to that renewal and review the renewal.</i> as shown below:</p>  <p>Result: Selecting this hyperlink opens the renewal transaction, and PolicyCenter will apply the change to the renewal term automatically.</p> <p>Note: If the hyperlink was not selected, the changes will not be applied to the renewal term. These changes will need to be handled manually, by following Steps 3-4.</p>
2	<p>Review the policy change by selecting Expand All, to make sure the changes applied. Select Close to remove the display.</p> 

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Apply Changes at Renewal, continued

Procedure,
continued

Step	Action
3	<p>If the policy change was to update the billing method, navigate to the <i>Payment</i> screen to apply the billing changes.</p> 
4	<p>Select Request Approval to submit the change.</p> 
5	<p>Upload any required documents, then select Submit:</p>  <p>Result: The policy change status changes to Policy Change (Pending UW Decision), or for auto-approved policy changes, the status changes to Policy Change (Bound).</p>

End of procedure