Making Changes to a Recreational Policy

This document provides the steps to guide you to successfully making a policy change, quoting, and issuing the policy change.

- Making Common Recreational Policy Changes
- Quote and Issue a Policy Change

Key Benefits

AMsuite is American Modern's state-of-the-art software solution. It consolidates the policy administration, claims and data applications into one platform for all Personal Lines products.

From motorcycles to manufactured homes, users will benefit from the same functionality, flow and flexible navigation. In a nut shell, AMsuite will make it easier for you to do what you do best—serve customers.

Make Common Recreational Policy Changes

Before you can create a policy change, you'll first need to search for the policy.

1 Click **Policy.** Enter the customer's 10-digit policy number. Click the search icon.

2 Click **Actions**. Select **Change Policy** from the **Actions** menu.

3 Enter today's date as the **Effective Date**.

Select the **Description**. Note the different options in the **Description** list. You would follow the same steps to make a single change or multiple changes. If you are making multiple changes, select "Multiple Changes".

4 Click **Next** to continue.

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5
While initiating a policy change, you may encounter the following warning:

"*There is another open policy change for this policy period. You may want to wait for that change to be completed, before proceeding with this change.*"

Click **Cancel** to view pending transactions, or **Next** to continue (no warning).

(If you click Cancel to view pending transactions, click the transaction number from the Summary page to view the details.)

6
Click **Vehicles** from the sidebar menu to add, remove or change a vehicle. Select the checkbox or double-click the row containing the vehicle you want to edit or remove. To add a vehicle, click **Create Vehicle** and enter the vehicle data. VIN, HIN, or Serial number is required for issuance. (Do not edit a vehicle to replace with another vehicle. Use add/remove to replace the vehicle.)

Click **Drivers** from the sidebar menu to add, remove or change a driver. Double-click the driver name in the Drivers Details section to edit.

7
Upload photos, if required. All Collector Vehicles require photos. Classic and custom motorcycles also require photos. You have up to three days to submit the photos before the quote expires due to missing information.

Click **Actions**, **New Document/Link to an existing document**. Click **Browse** to locate a photo. Select an acceptable photo format, and choose **Photo/Documentation/Appraisal** from the **Type** menu.

Click **Update**. When all photos are uploaded, click **Next** to continue.

8
Click **Coverages** from the left-hand sidebar panel to add, edit or remove a coverage. To edit coverage for a single vehicle, double-click the vehicle line.

Quote and Issue a Policy Change

9
Click **Quote**.

10
Review the quote with the customer. To withdraw the quote, click **Withdraw Transaction.**

Click **Save Draft** to save the quote. Click **Actions/New Note** to add a note to a transaction.

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> **Remember never to store Non-Public Personal Information (NPPI) in the note fields. Notes become part of the official record and cannot be deleted. Therefore, do not enter any personal or unprofessional comments.

10 If underwriting approval is needed, click **Risk Analysis** from the left-hand navigation panel to view blocking issues. If you are missing information, you will need to go back and make those corrections before proceeding to issuance.

11 Review pending issues before submitting the policy for UW Review. Once you see that all of your blocking issues are valid underwriting issues, click **Request Approval**.

12 Review and confirm that the information on the UW Activity page has prefilled correctly. Add any additional information needed. Click **Send Request**.

Underwriting needs to approve your policy before you move on. See your current underwriting standards for approval timelines. These timelines may vary.

13 Once underwriting has approved or rejected the request via an activity, the agent will receive an activity to review. Click Risk Analysis on the sidebar menu.

14 You will see that your Blocking Issues are now listed under **Already Approved**. Click **Next**.

15 Click **Bind Options**, **Issue Policy**.

A pop-up screen will appear that says, "Are you sure you want to issue this policy?" Click **OK**. (Even though this is a change, it will still say "issue this policy")

16 You can see that your policy change has been bound. You may click on "View your policy," or "Review Changes," to see a summary of your changes. You may also click "Go to your desktop," to return to your homepage.

For questions about using AMsuite, contact American Modern's Customer Service Team @ 1-800-543-2644.