

Making Changes to a Residential Policy

This document provides the steps to guide you to successfully make changes to policies for residential dwelling.

- Search for an Existing Policy
- Start a Policy Change
- 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.

Search for an Existing Account

Before you can make changes to an existing policy, you'll need to search for the account. An account is the person or company that has one or more policies with American Modern.

1

From the **My Activities** page, click the drop-down arrow on the **Policy** tab.

Enter Mr. Green's 10-digit policy number into the **Policy #** field and click **the search icon**. This will take you to the **Summary** page.

Start a Policy Change

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Click the drop-down arrow for the **Actions** menu.

Select **Change Policy**.

Enter the **Effective Date** and select the change you want to make from the **Description** drop-down menu.

3

Click **Next**.

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On the **Policy Info** page, scroll down and answer the questions, which are required before quoting a policy. Click **Next**.

From the **Dwelling** page, click the **Create Dwelling** button.

5

A new row will appear in the **Dwelling Details** list. You can remove a dwelling by selecting the checkbox next to that dwelling and then clicking **Remove Dwelling**.

To **edit** a dwelling, select the checkbox or double click that row. Needed changes can be made below. Make changes and click **Next**.

6

Click the drop-down arrow next to **Change To** and make your selection to go to the **Location Information** page.

Complete all mandatory fields, and then click **OK**.

Double click the dwelling and then click **Get Territory Details** button.

7

Answer all mandatory questions and click the **Protection Details** tab. Answer these questions and click the **Underwriting** tab.

8

Answer all questions on the **Underwriting** tab in order to be able to proceed to issuance. Click **Next** for the **Dwelling Construction** page.

Be sure that all mandatory fields are completed. If this is a Dwelling Special, first generate an **MSB** report. Then verify and click the **X**.

Make any changes to coverages and limits by clicking the line next to the dwelling for which the coverage applies and make changes in the **Coverages** tab.

9

Click **Quote**.

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Quote and Issue a Policy Change

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Review information on the **Quote** page and confirm that you will proceed to issuance.

If your quote needs underwriting approval, click **Risk Analysis** from the sidebar menu to view blocking issues. This is a requirement on all **Dwelling Special** submissions.

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The **Risk Analysis** page shows you what issues need approval. Review pending issues before submitting for **UW Review**, then click **Request Approval**.

12

From the **UW Activity** page, review the information that has prefilled, and then click **Send Request**.

From the **Risk Analysis** page, you will should see that any Blocking Issues are now listed under **Already Approved**. Click **Next** for the **Policy Review** page.

Click **Issue Policy**.

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A pop-up screen will appear that asks you if you are sure that you want to issue this policy. Click **OK**.

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The page refreshes to the **Policy Change Bound** screen. You may click any of the links to view your policy, review changes, or to see a summary of your changes. You may also return to your desktop to view your homepage.

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