AUTO CHANGE REQUEST PROCEDURE (as of 8/13/12)

Go to client in Tam and highlight correct Auto Policy

Click “Options” (on bottom of page) then select “Change Request”

If there has never been a change request issued the system will ask you “Is this a new Change Request”. Click “Yes”

If Change Requests have been issued in the past, the last request issued will automatically come up. Do NOT write over the old request.

You must select click “File” (on top left corner) then click “Add”

System will ask you “Is this a new Change Request”. Click “Yes”

System will automatically generate Change Request with today’s date as the effective date. If the change requires a different effective date, manually change the date under “Effective Date of Change”.

Under “Delete Date”, delete the date entirely. It should be blank.

ADDING A VEHICLE:

Click the “Veh” tab

Scroll down on the current list of vehicles, the new vehicle should have the sequential Rsk# and Co# from the last vehicle entered. (ie: If the last vehicle on the schedule is Rsk# 15 & Co# 17 then the new vehicle should be entered as Rsk# 16 & Co# 18)

Click the little circle next to “Add” (Under where is shows “Auto-Vehicle Description/Limits” in blue)

Fill in correct Risk# and Co# and fill in all vehicle information (refer to “Request to Add New Vehicle Form” as a guideline).

When entering the Garaging “State” be advised that when issuing ID Cards for this vehicle, the state entered will automatically create the correct Auto ID Card for that state. If a vehicle is garaged in one state but is registered in another, put the registration state in the “State” sections but put garaging City & State under the “City” Section. (ie: If vehicle is garaged in Patterson, NJ but registered in NY, Put Patterson, NJ under the “City” line but put NY under the “State” line).

After all vehicle info is input click the little circle next to ‘Coverages/Limts” (on the top right corner under the drilldown of vehicles).

Select all vehicle coverages needed (Liability Limits, Towing, Comp, Collision, Rental Reimbursement, Full Glass etc..). If adding Physical Damage, add the deductible amounts next to the white sections next to "Comp/OTC" and "Collision".

If there is an Additional Interest (Additional Insured/Loss Payee) for the vehicle, select the "Add'l Int" tab (on the bottom).

Click the little circle next to "Add"

"Bsns Auto/Truckers/Garage" circle should automatically be checked off.

Enter the same Risk# that you originally entered for the new vehicle (ie: 016).

Enter "001" under the Lien#. (If Insured has more than 1 Lein for this vehicle, additional Leins can be added as 002, 003, etc…)

Enter the Interest's complete Name and Address.

Under "Interest" select all the appropriate interest that apply (ie: Additional Insured and/or Loss Payee)

Under "Interest in Item" enter the same Co# that you originally entered for the new vehicle next to "Veh#" (ie: 018)

Under "Item Description" enter vehicle info (ie: 2012 BMW #2589)

Any additional info that you would like to add can be added under the "Remks" tab (on bottom).

If the Insured is registering the vehicle under a different Name Insured, indicate it in the "Remks" section.

DELETING A VEHICLE:

Select the "Veh" tab (on bottom)

Drilldown on list of vehicles and select the vehicle that needs to be deleted.

Check off the little circle next to "Delete" (the deleted vehicles info will automatically pre-fill).

REPLACEMENT VEHICLES:

If an Insured is "Replacing" a vehicle, do 2 changes on the same request (as long as it has same effective date). 1 to ADD new vehicle and 1 DELETE old vehicle.
Do NOT check-off the "Change" circle (see below for how to do more than 1 change on 1 Acord form)

ADDING & DELETING ADDITIONAL INTEREST:

Click the “Add’l Int” tab (on bottom).

TO ADD:

Click the little circle next to “Add”

Enter the same Risk# that is associated with the vehicle.

Enter “001” under the Lien#. (If Insured has more than 1 Lein for this vehicle, additional Leins can be added as 002, 003, etc…)

Enter the Interest’s complete Name and Address.

Under “Interest” select all the appropriate interest that apply (ie: Additional Insured and/or Loss Payee)

Under “Interest in Item” enter the same Co# associated with the vehicle next to “Veh#”

Under “Item Description” enter vehicle info (ie: 2012 BMW #2589)

TO DELETE:

Drilldown and select Additional Interest that needs to be deleted.

Click the little circle next to “Delete” (the deleted interest’s info will automatically pre-fill).

ADDING & DELETING DRIVERS:

Click the “Drivers” tab (on bottom).

TO ADD:

Click the little circle next to “Add”

Enter the next consecutive Risk# and Driver#

Enter Driver’s info (Name, Date of Birth, License#, State of License)

TO DELETE:

Drilldown and select Driver that needs to be deleted.

Click the little circle next to “Delete” (the driver’s info will automatically pre-fill).

MORE THAN 1 CHANGE TO BE ISSUED WITH THE SAME EFFECTIVE DATE:

Various changes can be issued on the same Acord Change Request form as long as it is the same policy# and effective date. (ie: Adding and/or Deleting more that 1 Vehicle, Driver or Additional Interest).

Do 1 change at a time. In order to add another transaction, just click the "Add" tab on the grey bar (on the way at the top of the page). Then continue to do the next change. You can keep adding as necessary.

In order to review all the changes you made, you can navigate between the "<<Previous<<" or ">>Next>>" tabs on the grey bar (on the way at the top of the page).

WHEN CHANGE REQUEST IS COMPLETED AND READY TO PRINT AND/OR SAVE:

Click "File" on top left corner.

Click 'Print"

"Print/Communication" page should automatically come-up.

If you are going to print, make sure printer that is showing is correct. To change, click "Setup" next to where is says the "Printer" and then select the correct printer.

Remove the Producer's code entirely

Amend the "Branch" to "1" (Large Commercial Lines)

Uncheck "Activity Record" (unless you want to create an activity but there is no need)

Select "Print" to Print or "Preview" to Save

Check-off "Immediately" next to "Update" (this will automatically update the Current application with the changes that were just made on the Change Request)

Click "OK"

"Policy History Information" page should automatically appear.
Making sure effective date is correct and enter a description of the change (ie: "Add 2012 BMW #2589 eff 8/13/12")

Click "OK"

When is asks "Do you want to move to history?" click "Yes"

Acord Change Request form will either print or come-up on your screen to save.

*** IMPORTANT THINGS TO REMEMBER ***

Any info added in the remark section will NOT automatically transfer onto the TAM application once application is updated. You will have to manually enter the information on TAM application.

If you check-off Rental Reimbursement (Rental Reim) and/or Full Glass (FG) on the change request it will not be added to the application once application is updated. You have to manually enter it on the application once you are done. You can put "RR" and/or "FG" on the Auto application under "Coverage Page 2" section of the auto application under that specific vehicle. There should be 2 empty spaces next to "Comp" and "Coll" under "Opts".

If a Future application exist make to manually update it. Change Request updates Current application ONLY.

Always remember to check to make sure application has been updated correctly once all is completed.

SENDING ACORD CHANGE REQUEST FORM TO CARRIER:

Attach the Acord Change Request Form to the e-mail/fax that you send to the carrier.

E-mail/Fax should be attached to a Q-CS (or equivalent) activity to follow-up for the endorsement.