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Creating a Policy Change (Option 1)

1. When creating a **policy change**, search for the existing policy number by going to [Search for Policy, Billing, and Claim Details](#).

The screenshot shows the 'SEARCH FOR POLICY, BILLING, AND CLAIM DETAILS' section. A search bar is at the top with a magnifying glass icon and the text 'SEARCH FOR POLICY, BILLING, AND CLAIM DETAILS'. Below it is a text input field with the placeholder text 'Enter a customer name (e.g., Jane Smith)' and a 'Search' button. To the right of the search bar is a dropdown menu showing '901 - HOME OFFICE AGENCY - MAILING'. Below the search bar are three sections: 'VIEW DOCUMENTS & FORMS' with buttons for 'Personal' and 'Commercial'; 'Find Coverage Forms' with buttons for 'Personal', 'Commercial', and 'Surety'; and 'OTHER RESOURCES' with buttons for 'AutoPay / EFT Forms', 'Loss Control Resources', 'Personal Lines Advisor', 'Billing Plans', 'Loss Runs & Reports', 'Personal Lines Tools', 'Bulletins', 'Marketing Materials', and 'Scholarship'. On the right side of the interface, there are two main sections: 'WRITE NEW BUSINESS' with a 'Start Quote/Application' button, and 'OTHER ACTIONS' with buttons for 'View Replacement Cost Estimator', 'View Quotes & Recent Activity', 'View Agency Bill', 'Endorse / Change a Policy', and 'View Quotes & Recent Transactions'.

2. Enter the **policyholder's name** and click **Search**.

3. Results will display below, when it is a **Select Auto** or *Signature Auto* policy, the account number will start with A.

4. Click on the arrow on the right side.

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AGENTSONLINE

Start a Quote

Test message

Policyholder:
Sam Jones

Agency ▼

1 result

3 SAM JONES A106160117
11567 E HAZEL PRAIRIE RD, LAKE NEBAGAMON, WI, 54849-9010 > 4

No more results

5. Select the policy by **clicking on the arrow** on the right side or clicking on the **account number**.

SAM JONES
312 2nd St SE, Cresco, IA, 52136-2042 | Account: A930038138

POLICIES SUMMARY

POLICIES

Personal Auto 9300044478 | Active

Total Premium: \$496.00 Eff Date: 01/28/22 Exp Date: 07/28/22 5 >

6. This will bring you to the **Policy Detail** screen. You can start your change by selecting **Change Policy**.

POLICY DETAIL

Personal Auto 9300044478 | Active

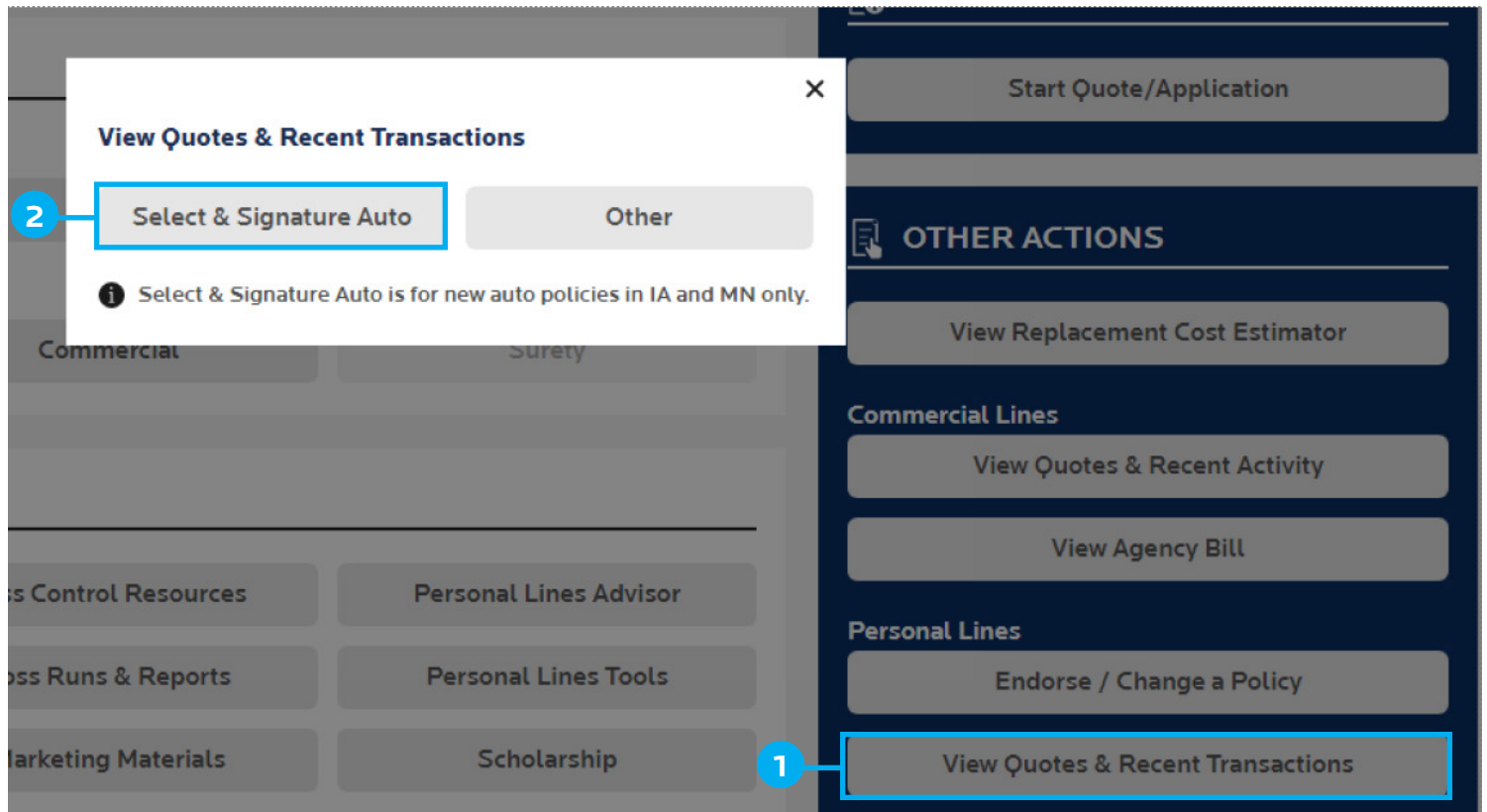
Eff. Date: 01/28/22 Insured By:
Exp. Date: 07/28/22 Agency: 901

Report a Claim 6

Policy Actions Change Policy | Copy to New Quote | Cancel Policy
View: Activites | Notes | Attachments

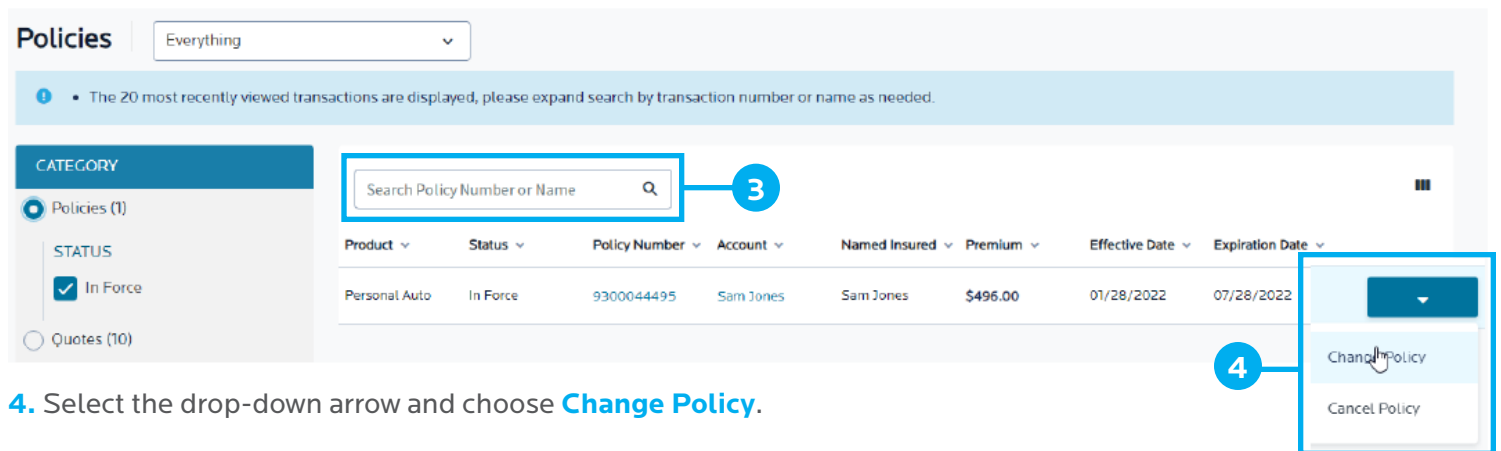
Creating a Policy Change (Option 2)

1. Select **View Quotes & Recent Transactions**.
2. Click on **Select and Signature Auto**.



This will bring you to the **Policies** page.

3. **Search** for the policyholder by name or policy number.



4. Select the drop-down arrow and choose **Change Policy**.

Printing a Policy Change

Policy Summary - On this page, you can **print** a copy of the Auto Policy Change Request.

1. Click on **Select All** and **Print Selected**, or
2. Put a **check in the box** next to the document and click on **Print Selected**.
3. Click on **Submit Change**.

Policy Changes

ACCOUNT: SAM JONES
Policy Auto(9300044495) - Policy Change 9300046280 Quoted Delete

POLICY INFORMATION

Policy Change Effective Date: 01/28/2022
Policy Period: 01/28/2022 - 07/28/2022
Total Premium: \$476.00

PRIMARY INSURED CONTACT DETAILS

Name: Sam Jones
Phone Number: 517-371-7732
Email Address: -

DOCUMENTS

Auto Policy Change Request

Select All Print Selected Send via Email

Save & Exit Previous Submit Change

Policy Change Summary - This page shows the finalized policy change.

This policy has been changed.

POLICY CHANGE SUMMARY

Account Number	A930038138
Policy Number	9300044495
Transaction Number	9300046280
Policy Holder Name	Sam Jones
Policy Type	Personal Auto
Policy Period	01/28/2022 - 07/28/2022
Change Effective Date	01/28/2022
Policy Total Cost	\$476.00
Change In Cost	-\$20.00

CONTACT INFORMATION DETAILS

Primary Insured Name	Sam Jones
Phone Number	5173717732
Email Address	-

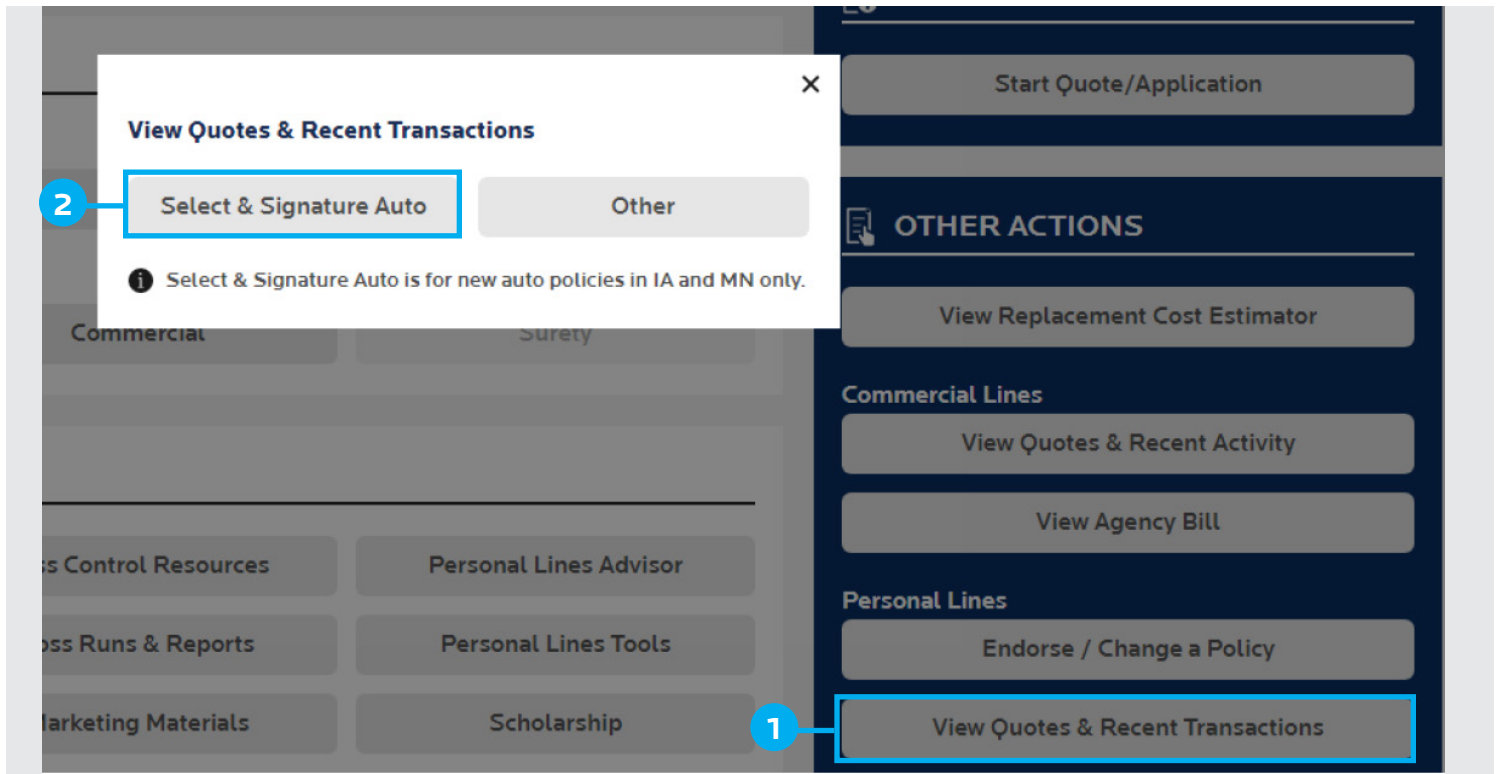
Next

Note: An amended declaration will be available the following day on *AgentsOnline*, and if you need a copy right away, your Underwriting Assistant can send the amended declaration.

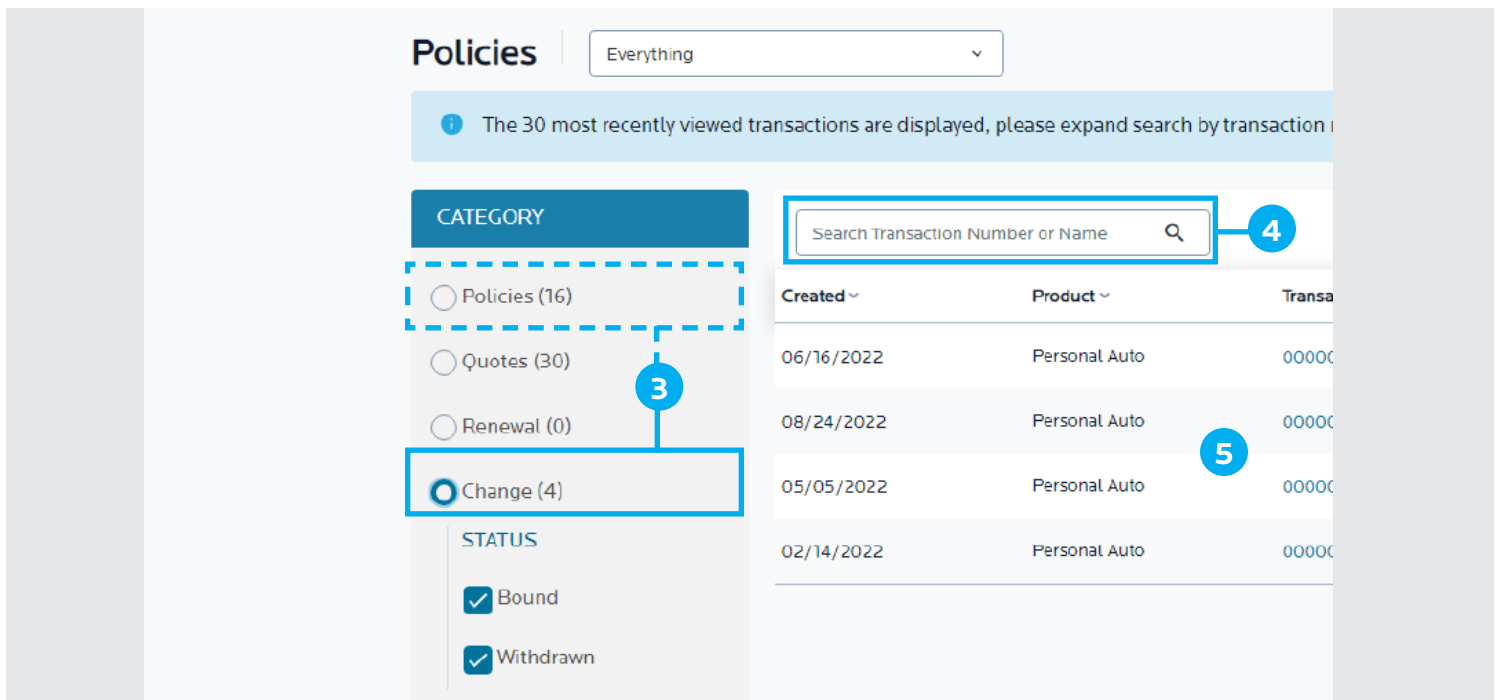
I started a Policy Change, how do I get back to it?

If you are looking for a change you have already started, use the following steps.

1. Select **View Quotes & Recent Transactions**.
2. Click on **Select and Signature Auto**.



3. On the **Policies** page - change the **Category** from **Policies** to **Change**.
4. Search by **Transaction Number** (which is different than the policy number) or **Name**.
5. Click on the **Transaction number** to go into the **Policy Change**.



Policy Details

1. Select the **Effective Date** of the change.
2. Then you can select the link below to jump to the page you need to make your change. Example: Add a driver – select **Change Driver**. To increase a coverage limit - select **Change Coverages**.

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Search by name, address, or number

+ Start New Quote

Accounts Policies Claims

Policy Changes

- Policy Details
- Drivers
- Vehicles
- Coverages
- Vehicle Driver Assignment
- Incidents and Reports
- Quote

ACCOUNT: CAROLE KING

Personal Auto(1061123524) Select

POLICY DETAILS

Effective Date of Change

Policy Effective Date **Feb 15, 2024**

Policy Expiration Date **Aug 15, 2024**

Select a link below to jump directly to:

- Change Policy Details
- Change Driver
- Change Vehicle
- Change Additional Interest
- Change Coverage

Change Driver - Driver's page

1. Select **Add Driver** to add a new driver to the policy.

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ACCOUNT: SAM JONES

Policy Auto(9300044495) - Policy Change 9300046280 Draft

Delete

DRIVERS/HOUSEHOLD MEMBERS

Delete Selected **Add Driver**

<input type="checkbox"/>	Driver#	Name	Date of Birth	Gender	Relationship	Licensed	Rated Driver	
<input type="checkbox"/>	1	Sam Jones	Apr 21, 1985	Female	Insured	Yes	Yes	View/Edit

2. **Enter new driver information** - do not forget to scroll down to answer license information and underwriting questions.

3 View/Edit

DRIVER / HOUSEHOLD MEMBER - CONTACT DETAILS

First Name *

Middle Name

Last Name *

Suffix

Date of Birth *

3. To complete the change, select **Next** at the bottom of each screen until you get to the quote screen.

Policy Change - Quote - Underwriter referral

1. You can send a message to the Underwriter to review the issue by clicking on [Refer to Underwriter](#).

ACCOUNT: SAM JONES
Policy Auto(9300044495) - Policy Change 9300046280 Quoted [Delete](#)

1 Item Requiring Underwriter Referral

- MVR failed for Willow Jones

1 [Refer to Underwriter](#)

[Multi-Versions](#) [Print](#)

Premium Summary	
Current Premium:	\$496.00
Change in Premium	-\$20.00
New Premium	\$476.00

1 Policy Change Effective Date
01/28/2022

1 Policy Period
01/28/2022 - 07/28/2022

1 This change will result in a premium decrease

- The new premium will be \$476.00, which is a decrease of -\$20.00. This change will be reflected in upcoming invoices.

POLICY CHANGES

Policy Change - Quote

1. This screen outlines the [Premium Summary](#) and does a comparison of the policy changes from the existing policy to the New Changes. Select [Next](#).

ACCOUNT: SAM JONES
Policy Auto(9300044495) - Policy Change 9300046280 Quoted [Delete](#)

[Multi-Versions](#) [Print](#)

Premium Summary	
Current Premium:	\$496.00
Change in Premium	-\$20.00
New Premium	\$476.00

1 This change will result in a premium decrease

- The new premium will be \$476.00, which is a decrease of -\$20.00. This change will be reflected in upcoming invoices.

POLICY CHANGES

Policy Information

Written Date 01/28/2022 02/11/2022

Drivers

Driver: Willow Jones Added

Drivers

[Save & Exit](#)
Driver: Willow Jones

[Previous](#) [Next](#) **1**