



ProgramConnect Renewal Procedures for Producers

- Prior to an expiration date, using renewal lists from your agency management system, contact insured to request changes. We do not send out renewal lists.
- The underwriter reviews the policy. If approved for renewal, the policy will be available to begin the renewal process 60 days prior to expiration. The **Policy Changes** screen displays a **Renew Policy** button to click for a renewal quote, binder or issue.
- Click **Edit** and **Continue** buttons to update each Tab, review the information and update it where necessary. You cannot proceed if any required fields are left blank.
- The **Instant Indication** tab shows the renewal quote. If acceptable, click **Complete Application** button. Then click **Continue** to update all fields. Click **Save** on the top menu bar.
- On the **Summary** screen, review the updated premium, fee and taxes information. To bind, on the **Summary** screen, change this question to yes:

The applicant agrees to all information in this current application before binding this renewal policy.

- A quote may **Refer** due to updated info. To continue, notify your underwriter.
- If not in **Refer** status, click **Issue Quote**. A **Current policy/quote saved to database** dialog box opens. Click **OK**.
- Click the **Print** button on the **Summary** screen to open the **Print Options** screen. Click **Print Quote/Binder** to open the quote. Click the **Print** button on your web browser to print the quote. Click the **Back** button on your web browser to return to the **Print Options** screen.
- Print the application, affidavits and any supplements. To view the affidavits, click the name of the state. When you are finished printing, click the account name, which appears in the first line of text. On the **Summary** screen, click **Continue**.
- On the **Policy Changes** screen, click **Bind and Print**. Note: here Print means a policy will be produced internally, not printed for you.

Notes:

- Renewals can be processed only prior to or on the expiration date
- If past the expiration date, contact your underwriter promptly.
- Soon to be implemented, we will send a renewal reminder to the producer email address in ProgramConnect 60 days prior to renewal.
- Your agency's ProgramConnect administrator should verify the email address per the instructions on the Home Page to permit timely delivery of renewal reminders.

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