

## Task Organizer – PL and CL Cancellations

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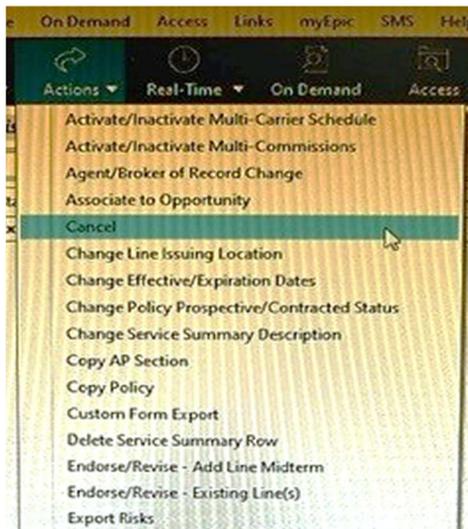
- Cancellations may be received the following ways:
  - LPR request- Light rail
  - Phone call
  - Email
  - In office
- Verify clients Email Address in EPIC for signature if sending it via email.
- Verify clients Mailing Address

### Step 1: Cancel in EPIC

- Locate the client.
- Go to client's policy tab.
- Highlight desired policy needing cancellation.
- Click actions on top ribbon bar.



- Select Cancel from drop down.



- The following box will pop up:

Cancel
×

**Type/Effective Date**

Cancellation request    Policy release

Cancellation effective

Description

**Policy**

Policy # F2045382  
 Type Personal Automobile  
 Term 12/1/2022 to 12/1/2023

**Line(s) of Business**

Line	Line Description	Status Description	Line Eff	Line Exp	ICO	PPE Type	PPE
<input checked="" type="checkbox"/> AUTO	Personal Automobile	REN - Renewal	12/1/2022	12/1/2023	SAFMU1	CA	SAFMU1

Detail   Finish   Cancel

| 0.65s | CANADD

You will

- Change Type to Policy Release
- Insert Effective date
- Description – The reason for cancellation
  - Sold Vehicle/Property
  - Found Lower Price
  - Rewritten
  - No Longer Driving
  - No Longer Desire Coverage
  - Found a Closer Agent
  - Moved out of State
  - Non-Pay
  - Company Notified Agency Directly
  - Dissatisfied Claim

Click Detail

Detail

Finish

Cancel

The next box will pop up...

Add an Activity

Category

Code  &ServSumEffDate& &ServSumDesc& &Po... Priority

Description

Who/Owner  Employee  Work group  Emalee Harrington

**Detail**

Update

Follow up/Start  at

End  at

Reminder  at

Issuing company  Safeco/Liberty Mutual

Premium payable   Safeco/Liberty Mutual

Amount

**Who to Contact**

Name  Contact via  (706) 778-7896

**Open/Close**

Status  Open  Closed

Closed

Reason

Actual time  hrs  mins

Actual cost

**Note**

Access level

Sent via mail

0.45s | ACTADD

You will enter:

- Amount qualifier & 0.00
- How you are sending the LPR in the note section.
- Click Finish
- After clicking finish you should see the following section in the middle of your screen:

Cancellation Reason

Reason  Insured's Request

If "Other"

Company

Policy #

Effective

- Fill in the reason.
  - On the left side, click Remarks.

Policies

- AUTO - 12/1/2023
- Servicing/Billing
- Cancellation Req
  - Reason/Method
  - Addl Interests
  - Remarks

- You will then be directed to this screen:

Remarks

Date	Description	Print
9/11/2023 11:...		No

Date entered 9/11/2023 11:10:41 AM  Print on form

Description

- Click the + to add remark.
- Remark will be the same cancellation reason.
- Check print on form.
- Select print drop down.



- Select cancellation.
- On the next pop-up screen go to Distribution tab

Print Cancellation

Organization Contact

Name Jack Bradley Agency Inc License # 72110  
Address 138 Market Corners Drive Cornelia, GA 30531

Detail Forms Organization Contact **Distribution**

Distribute To

Account	Contact	Via
<input checked="" type="checkbox"/> Peggy Martin	Peggy Martin	Print
<input type="checkbox"/>	PEACHSTATE FEDERAL CU	Print

Account

Delivery Options [Change Notification Settings](#)

Contact

Via  Deliver  Now  Schedule

Printer  [Change Printer Settings](#)

Email/Fax Details

From  Change Sender

To...

Cc...

Bcc...

Subject

Message

Template  Refresh

Branding  Refresh

Signature  Refresh

Preview Finish Cancel

- Uncheck any name that is not insured.
- Via print should always be selected

- If sending via RightSignature:
  - Change printer to Microsoft print to PDF
- If sending via Mail:
- Change printer to desired printer
- Click Finish.

\*If you printed to PDF, file explorer will pop up – Name the file – Save to desired location \*

## Step 2: Send for Signature

- Send via Right signature if sending through email.
- If sending via mail put in a MAOU

## Step 3: Attach

- Attach signed LPR to CPOL

\*Note that you have attached the signed LPR to the CPOL\*

Attachment Description should read: ***Signed LPR policy # & effective date***

## Step 4: Cancel with Company

- CPOL description has cancellation effective date and reason.

## Step 5: Document CPOL

- Copy and paste confirmation into notes of CPOL
- Attach screenshot of carrier website showing the cancellation
  - If emailed, attach to CPOL in Epic.

## Step 6: Follow up

- Push out follow up date on CPOL 3 days to wait for download.

## Step 7: CANCELLED

- Policy Line should always show cancelled before closing CPOL.

## Step 8: Close CPOL

- Note CPOL- "Cancelled by download" (PL)
- Note CPOL - **“Cancellation endt attached” “Cancellation endt & Inv attached” (CL)**
- Action > close > Unsuccessful > Cancel reason > Finish

Take The Following Steps If the Renewal Term Has Already Downloaded but You Are Cancelling The Current Term:

### EXAMPLE:

John Doe calls in on 08/01/2023 to cancel his auto.

Auto terms showing in Epic:

08/16/2022 – 08/16/2023

08/16/2023-08/16/2024

You will cancel the 2022-2023 term and it will download cancelled but the 2023-2024 will stay “active” in Epic.

### Do these following steps to get rid of the renewal term:

- Cancel in Epic like normal.
- Note the CPOL – cancelled current term (effective date)
- Close the CPOL
- Highlight renewal policy line.
- Action
- Issue cancellation
- Line should show “cancelled” just like the current term.