Broker User Guide

How to initiate
a Cancellation

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Once you've logged in, locate the policy you want to Cancel by browsing the tabs on the Dashboard or utilising the Quick Search tool by entering the Policy Number, Insured Name or Property Address.

1. Locate via Quick Search.
   a. Type the Policy Number, Insured Name or Property Address in the search field and click Search to view.
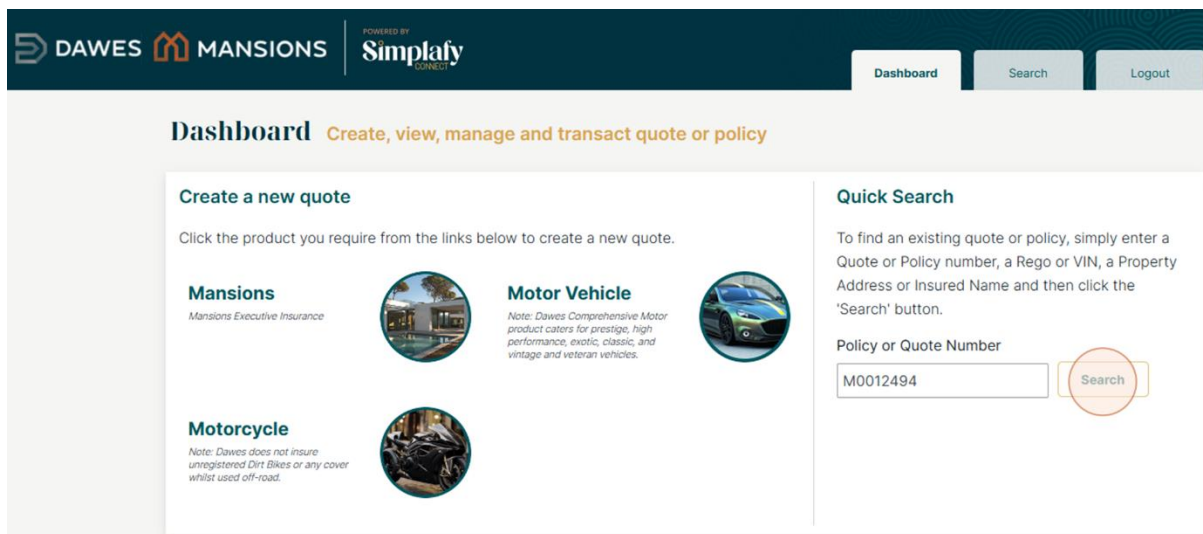
2. Locate via Dashboard.
   a. Scroll to policy in the Recent quote or policy section and double click to view.
   b. You can also click on the tab next to Dashboard titled Search to find existing policies by more detailed parameters such as Product Term Dates and Status.

3. After confirming it is the correct policy, simply scroll down and click "Cancel Policy" to proceed.

4. The Stage of the policy will change to Cancellation, Status, draft.

5. Go to the Policy Details section to enter Effective date and the Cancellation Reason from the drop-down menu.

   In this example we have selected the Due to Non-Payment reason in the drop-down menu.

6. It is always appreciated if you can also leave some comments in the Comments section for the Underwriter to understand the nature of the transaction for an expeditious response. Just click on the +Add button.
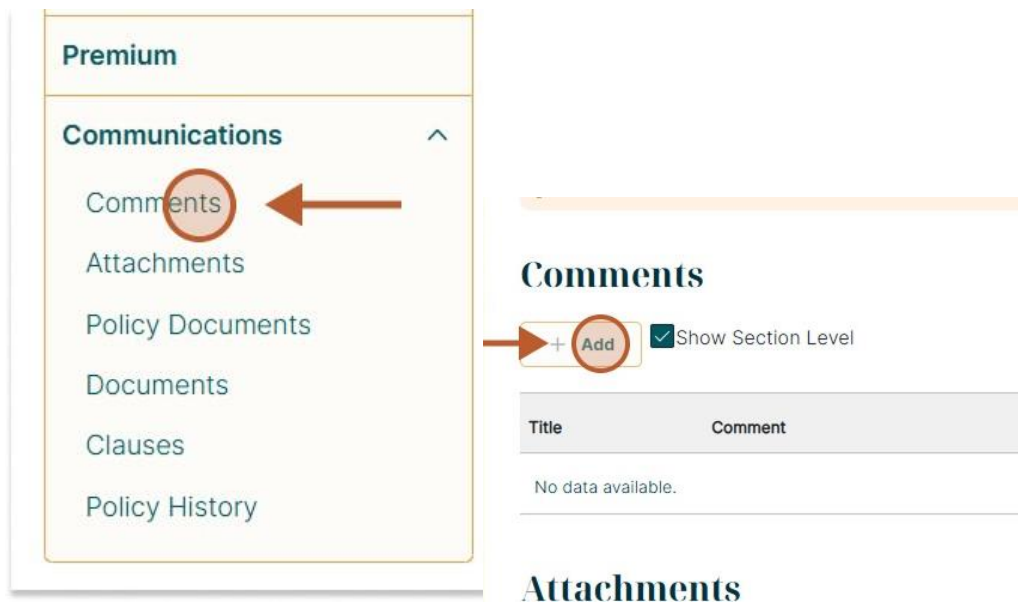
7. Once you have filled in the date and reason and made any necessary comments, simply click "Calculate Terms" and "Submit Referral" on the navigation menu to refer the policy to an Underwriter who will review and generate a cancellation premium for you.

   The status of the transaction will be changed to Referral Underwriter.