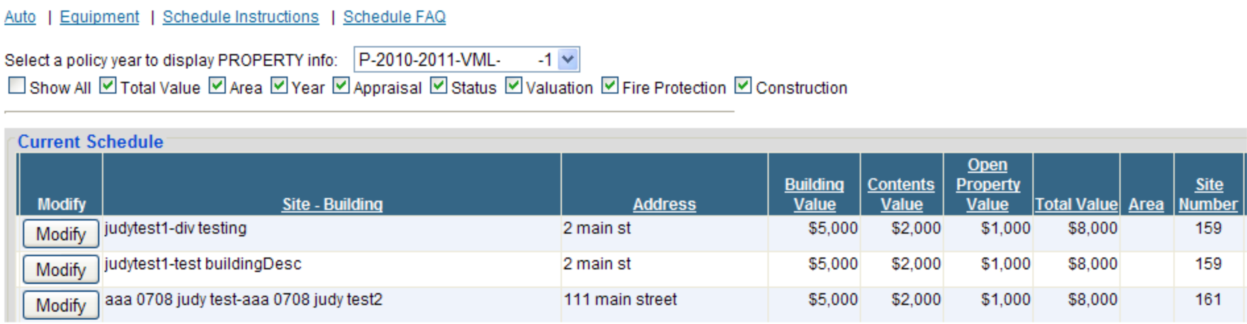
# Instructions for Viewing and Updating Schedules



## I. Viewing Current Schedules:

Current Schedule information displays in the top section of the screen.


Auto | Equipment | Schedule Instructions | Schedule FAQ

Select a policy year to display PROPERTY info: P-2010-2011-VML- -1

☐ Show All ☑ Total Value ☑ Area ☑ Year ☑ Appraisal ☑ Status ☑ Valuation ☑ Fire Protection ☑ Construction

Current Schedule

| Modify | Site - Building | Address | Building Value | Contents Value | Open Property Value | Total Value | Area | Site Number |
|---|---|---|---|---|---|---|---|---|
| Modify | judytest1-div testing | 2 main st | $5,000 | $2,000 | $1,000 | $8,000 | | 159 |
| Modify | judytest1-test buildingDesc | 2 main st | $5,000 | $2,000 | $1,000 | $8,000 | | 159 |
| Modify | aaa 0708 judy test-aaa 0708 judy test2 | 111 main street | $5,000 | $2,000 | $1,000 | $8,000 | | 161 |

1. Selecting policy years
   1.1. The schedule will default to the current, active year. Other policy years may be selected from the dropdown.
   1.2. Only items for the selected policy year will be displayed.
   1.3. Only items for non-expired policy years may be modified, with proper user permissions.
2. Header options
   2.1. Check or uncheck individual header options to limit viewing information
   2.2. Click on a column header to sort in ascending order.
   2.3. Click on the column header again to sort in descending order.
3. Locating Records
   3.1. By default, 10 records display at a time.
   3.2. Click on the page numbers at the bottom of the grid to move to anther page.
   3.3. Click on the elipses (…) to display the next group of page numbers.
   3.4. Click on "Show All Items" to display all item at the same time. (Note: Response time may be slower for larger schedules when this option is selected due to the amount of data being retrieved.)
4. Exporting schedule items to Excel
   4.1. Select the desired policy year
   4.2. Click on "Export to Excel" below the Current Schedule
   4.3. The option to 'Open', 'Save' or 'Cancel' will display in a popup window

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## II. Viewing Pending Changes:

1. The *New and Pending Changes* section displays all requests submitted the current day as well as any prior requests that have not yet been processed.

# Instructions for Viewing and Updating Schedules

New and Pending Changes ( Hover over status for explanation of On-hold or Rejected changes )

| Modify | Status | Action | Site - Building | Address | Building Value | Contents Value | Open Property Value |
|---|---|---|---|---|---|---|---|
| Modify | Resubmitted | AddNew | New Site | 456 gary st | $0 | $0 | $0 |
| Modify | Onhold | Modify | judytest1-div testing | 2 main st | $5,000 | $2,000 | $1,000 |
| Modify | Resubmitted | AddNew | Administration Building-test | 7516 County Complex Road | $0 | $0 | $0 |

2. The *Action* column indicates the type request submitted: AddNew, Update, Reinstate, Terminate.
3. Red highlighted fields identify the information that has changed on Update, Reinstate and Terminate requests.
4. The *Status* column indicates where the request is in the Underwriting process.
    - **Submitted** – The change has been submitted but not yet reviewed by Underwriting. Items in 'Submitted' status may be modified.
    - **Approved** – Underwriters have approved the submitted change and it is waiting to be imported into VML's underwriting system. Users cannot make changes until the record has been processed.
    - **Processed** – The change has been imported into VML's Underwriting system and will appear in the Current Schedule after the website information is updated overnight. Once an item has been processed, a new change may be submitted.
    - **On Hold** – There will be a delay in processing the request. A reason will display when the cursor hovers over the 'On Hold" text in the Status column. Changes/updates may be made and the request resubmitted.
    - **Rejected** – Underwriters have rejected the request, usually because of coverage issues. A reason will display when the cursor hovers over the "Rejected" text in the status column. Changes/updates may be made and the request resubmitted.
    - **Resubmitted** – A request that was previously on hold or rejected has been resubmitted for reconsideration. Items in 'Resubmitted' status may be modified.

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## III. Adding New Items:

1. Make sure the current policy year is selected.
2. Click on "Add New" located below the *Current Schedule* grid.
3. Enter information. Red highlighted text and asterisks denote required fields.
4. For Property Items only, select the associated site. To add a new site:
    4.1.1. Click on "AddNewSite,"
    4.1.2. Enter Site information.
    4.1.3. Click on "Add"
    4.1.4. A message will display "New site has been added successfully"
5. Click "Insert" to submit details information.
6. A message will display "Your add request has been submitted to Underwriting."
7. The newly added item is now visible in the *New and Pending Changes* section.

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## IV. Modifying and Updating Items:

1. Make sure the current policy year is selected.
2. Locate the item to be updated in the *Current Schedule* and click the "Modify" button to its left.

3. Enter information. Red highlights and asterisks denote required fields.
4. When finished, click on "Update" to submit changes.
5. A message will display "Your change request has been submitted to Underwriting."
6. The updated item is now visible in the *New and Pending Changes* section. Changed fields are highlighted in red.

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## V. Terminating Active Items:

1. Make sure the current policy year is selected.
2. Locate the item to be terminated in the *Current Schedule*.
3. Click on "Modify" button to the left of the item.
4. Scroll down and click on "Terminate"
5. The termination date defaults to the current date and may be modified, as necessary.
6. Click "Save"
7. A message will display "Your termination request has been submitted to Underwriting."
8. The terminated item is now visible in the *New and Pending Changes* section.

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## VI. Re-instating Terminated Items:

1. Make sure the current policy year is selected.
2. Locate the item to be reinstated – either in the *Current Schedule* or in the *New and Pending Changes* section, if the termination request was just submitted in error.
3. Click on the "Modify" button to the left of the property.
4. Scroll down and click on "Reinstate".
5. Verify or change the Termination date (defaults to policy end date).
6. Click "Save".
7. A message will display "Your reinstate request has been submitted to Underwriting."
8. The reinstated item is now visible in the *New and Pending Changes* section.

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## VII. Modifying Pending Changes:

1. Locate the target record in the *New and Pending Changes* section.
2. Click "Modify" to the left of the record. (Note: Approved and Processed changes cannot be modified. See the "Viewing Pending Changes" section of this document for further explanation.)
3. Enter necessary changes. Red highlights and asterisks denote required information.
4. Click on "Update" to submit changes, or on "Resubmit" if modifying a change that was previously on hold or rejected.
5. A message will display "Your request has been submitted [or resubmitted] to Underwriting."
6. The updated information will be visible in the *New and Pending Changes* section.

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