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Policy Expiration Workflow

Policy Expiration Workflow

At the Client level, click the **POLICIES** link on the **Client** menu to show all in force policies.

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Note: The status of an expired policy is changed to **Expired** when the **Details** *restriction* is clicked and the **OK** button is selected in the **Expired** status pop-up window.

Handling an Expired Policy

Clicking the **Details** icon at any level where the policy expiration date is a date in the past (and the status is other than **Expired**) will prompt the **Expired** status pop-up window, which asks, **Do you wish to change the status to Expired**? The only time the policy should be changed to **Expired** is when the policy has not or will not be renewed.





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Click the **OK** button to acknowledge the policy status change.

To send expired policies to history, click the **History** link on the underwriting screen.

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Policy D	Policy Description: GL policy		Origination Date:		12/01/2008				
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In the pop-up window, choose **Non-Renewed** or **Lapsed** from the **Status** drop-down list (depending on the circumstance) and enter a description as to why the policy is not being renewed in the **Notes** box.

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Status:	Lapsed
Notes:	No response from client for renewal request.
	Save Cancel
Click th	he Save button to send the expired policy to history.