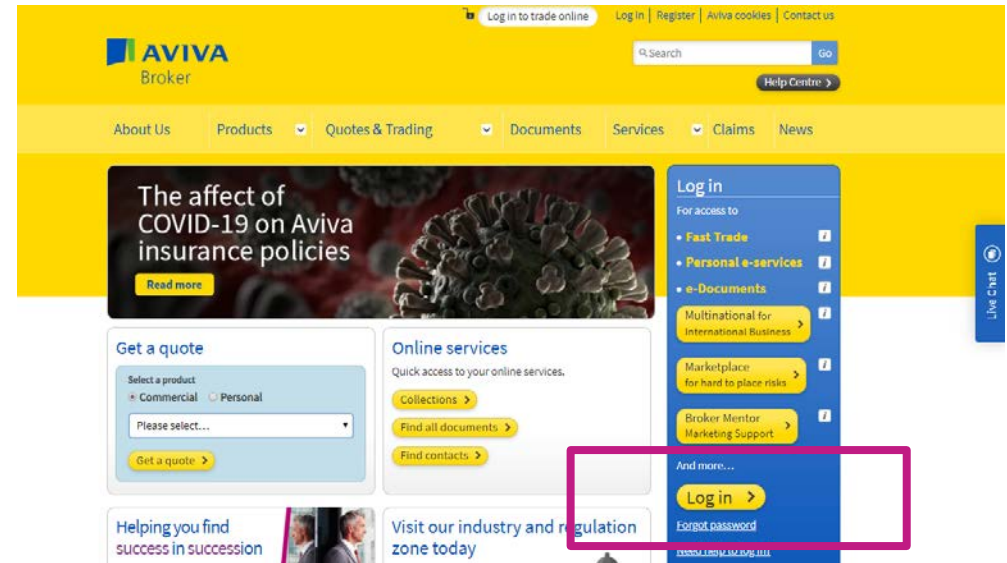




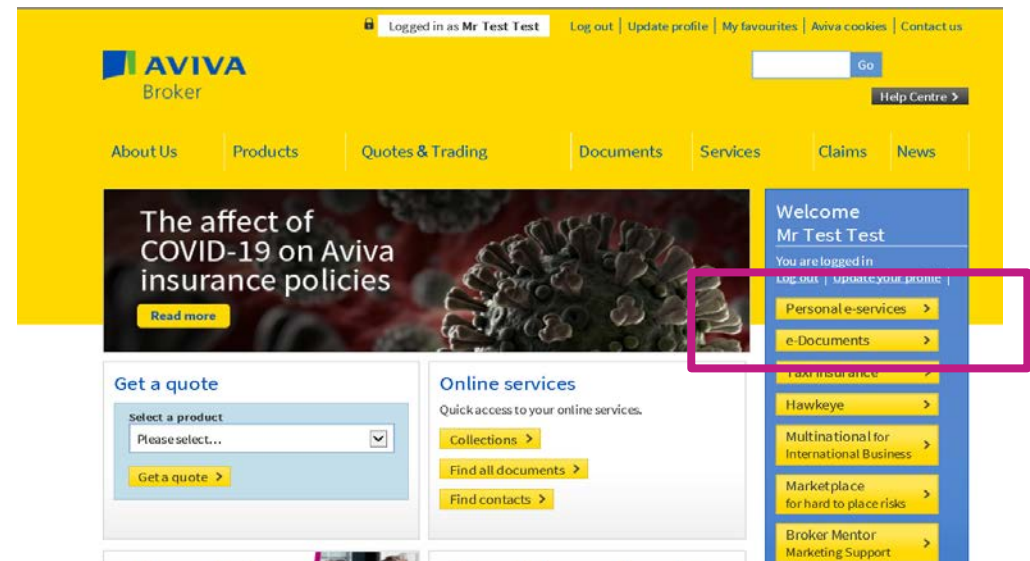
Personal Lines eServices – mid term adjustments

How do you make mid-term adjustments (MTAs) on our Personal Lines eServices?

1. Log into Aviva Broker.



2. Go to Personal eServices.





Personal Lines eServices – mid term adjustments

How do you make mid-term adjustments (MTAs) on our Personal Lines eServices?

3. Select policy processing.

The screenshot shows a vertical yellow menu on the left with four options: 'New Business', 'Policy Processing', 'Commercial e-services', and 'Exit'. The 'Policy Processing' option is highlighted with a pink rectangular box. To the right is the AVIVA home page, which includes the AVIVA logo, 'Home Page Profile - AGENT', and a disclaimer: 'The data held on this system is only available to authorised users. Action including legal proceedings may be taken against you for: Any unauthorised access or unauthorised modifications to this system. Any misuse or unauthorised disclosure of the personal data held on this system. Any unauthorised copying of materials held on this system.' Below this is a 'Contacts' section with instructions on how to reach technical support.

4. Enter the policy number and hit search.

The screenshot shows the 'Policy/Application Index' search form. At the top left is the AVIVA logo. The title 'Policy/Application Index' is in blue. Below the title is a note: 'Any field preceded by an asterisk (*) is required.' The form contains several fields: '*Search Type:' with a dropdown menu set to 'Policy'; '*Line of Business:' with a dropdown menu set to 'Select'; '*Product:' with a dropdown menu; 'Policy Number:' with a text input field; 'Last Name:' with a text input field; 'First Name:' with a text input field; 'Company Name:' with a text input field; 'Postcode:' with a text input field; 'Vehicle Registration:' with a text input field; and 'Agreement Number:' with a text input field. There are 'Search' and 'Reset' buttons. A pink rectangular box highlights the 'Policy Number' and 'Last Name' fields. Below the search form is a large empty rectangular box. At the bottom, there is a 'Transaction Date:' section with a dropdown menu set to 'Select' and a 'Transaction History' button.



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5. Select the current line (top) and input the effective date of the change into “Transaction Date”. Hit “Select”.

AVIVA Policy/Application Index

Any field preceded by an asterisk (*) is required.

*Search Type: Policy [Select] *Line of Business: [Select] *Product: [Select]

Policy Number: [Empty] Vehicle Registration: [Empty] Agreement Number: [Empty]

Last Name: [Empty] First Name: [Empty] Company Name: [Empty] Postcode: [Empty]

Search [Empty] Reset [Empty]

Product	Policyholder	Int. PH	Address	Effective Date	Expiration Date	Premium Amount	Transaction Date	Transaction Type	Vehicle
Policy No.	Date Of Birth	DOB							
Private Car,	Mr. Test Test,	01/01/1980	8, Surrey Street NORWICH NR7 0WF	20/03/2020	20/03/2021	1053.17	20/03/2020	New business	Toyota CC T SPIRIT

Transaction Date: [Empty] Select [Empty] Transaction History [Empty]

6. Select “Amendment” and hit “Accept”.

AVIVA Policy Activity

Quote/Policy Number: [Empty] Agency Reference: 4P999

Product Name: Private Car Customer Name: Mr. Test Test

Inception/Transaction Date: 20/3/2020

Policy [Empty], effective 20/03/2020 - 20/03/2021, will be updated.
Transaction effective date is 20/03/2020.

Amendment
 Fresh New Business
 Cancellation

Accept [Empty] Cancel [Empty]