How to Add a Companion Auto (Quote) to a Home Quote and Ensure the Best Possible Rate for Persistency and Tier

This document will walk you through the process of entering the companion auto quote information so the customer will receive the best possible rate up front before actually binding the Auto. We will take all feedback about this process into consideration for a possible future enhancement.

You will need a few key pieces of information from the auto quote to enter into the home quote for these discounts to apply.

The following information is needed from the auto quote:

- Auto quote policy state
- Quote number
- Effective date
- Policy tier
- Auto policy BI limit
- Auto persistency (in years)
  - Currently, you will ask the customer for the years they’ve been insured with AAA and their prior carrier – enter that number

The policy state and quote number can be found on the policy overview page for the auto quote.
The policy tier, BI limits and persistency info can be found on the rating details page.

- The auto persistency is a combination of the years with the most recent prior carrier and the time with the Signature Series product.
  - If an insured is unsure of their Auto Insurance Persistency, it can be calculated by reviewing their PAS Auto Policy.
  - On the General Tab of the auto policy, add the months with [prior] Carrier to the months in PAS, then convert the months to years. Round partial years down. (example 21 months = 1.75 years = 1 year of persistency)
• Policy tier can be found in the Quote Info section
• The BI limit can be found in the Vehicle Info section

Once you have the information from the auto quote, you can now add this information to the home quote and apply the discount. Follow the steps below.

**Step 1**
Click the ‘Add’ button under the List of other Active AAA policies on the Applicant tab

**Step 2**
Click ‘Cancel’ when the Pop Up box appears to search for the policy
Step 3

Choose ‘Auto’ from the Policy Type dropdown and select the ‘No’ radio button for ‘Companion Auto Pending with Discount.’ This will open up new fields as seen below.

Select the ‘Auto policy state,’ enter in the quote number *WITHOUT* the ‘Q’ in the front.

Continue with filling out the additional fields: Effective date, Policy tier, Auto policy BI limit, and Auto Insurance Persistency

Once you have entered in the above information you can proceed with entering the rest of the information for the quote as you normally would.