Accessing the Agent of Record Form

1. On the Agent HQ℠ home page, enter the customer’s last name, state and zip code.

2. Click Search.

3. If the customer is new to your agency click Add Customer.

4. Complete the Add Customer screen and click Account List.
If you have quoted the customer before, their name and address will display in a grid.

5. Click to highlight the customer’s info.

6. Click Account List.

7. On the left side of the Account List screen click Change Request.

8. Click Agent of Record.
Completing the Agent of Record Form

The Agent/Broker of Record Change form will display.

9. Under Request Type, Agent Change is pre-selected.
   ✔ Select Agent Change to request a change to the agent code only.
   ✔ Select Agent and Company Change to request a change to the agent code and place the new policy in the current new business program.

For example if the customer’s existing policy is in our Legacy auto program, click Agent and Company Change to have the new policy written in our Quantum Auto 2.0® program.

Note: Quantum Auto 2.0 is not available in all states.

10. Enter the new 6 digit agent code beginning with the leading zero.

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Only Personal Insurance agent codes can be entered.
11. Enter each of the customer’s policy numbers.

**Note:** Accurate policy numbers ensure the change will be done in a timely manner.

For the change effective date, **At Renewal** is pre-selected and strongly recommended.

If a midterm effective date is necessary, click **Midterm** and enter the effective date.

12. In the **Read and Signature Required** section enter the requesting agency name.

13. Click **Print**.

If a midterm change is requested, an informational message will display advising premium changes may result from a midterm change.

14. Click **OK** to continue.
Printing the Form

A message will display at the top of the screen and incorrect fields will be indicated with the notation Error if:

✓ Required fields are left blank
✓ A policy number is entered with less than 13 numbers
✓ An effective date is entered in the wrong format

15. Correct any errors and click Print.

Once all errors are corrected, a separate browser window will display with the completed Agent of Record form.

16. Click Print this page to print the form from this window.

17. Have the insured sign and date the form, then fax the form to 1-877-872-5334.

18. Click Close this Window after printing.
The **Agent/Broker of Record Change** screen will display again. Another Agent of Record change can be completed if needed.

19. Once complete click **Close Customer** to return to Customer Selection.

From Customer Selection you can access another customer or close out of the Travelers system.

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**After Submitting the Form**

- ✓ The current agent of record will be sent a canceling letter, notifying them of the requested change.
- ✓ The old policy is cancelled; a new policy is issued with the new agent code and is sent to your client.
- ✓ If the effective date of the new policy is more than 75 days in the future, you will receive an acknowledgement letter documenting receipt of your request.* This letter will contain the effective date of change; confirm the effective date is correct.

*Exception: For Kentucky Homeowner, Homesaver, Personal Articles Floater and Umbrella, you will receive an acknowledgement letter if the effective date of the new policy is more than **90 days** in the future.

If you have any questions on this process, please contact our Business Center at 1-877-878-2468.