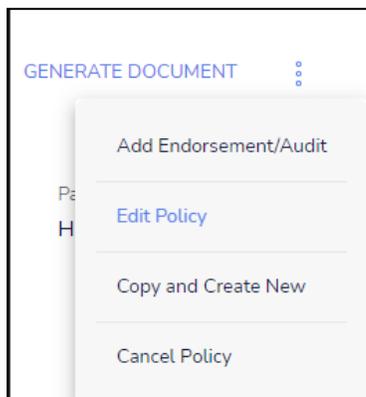


Return to Broker Process

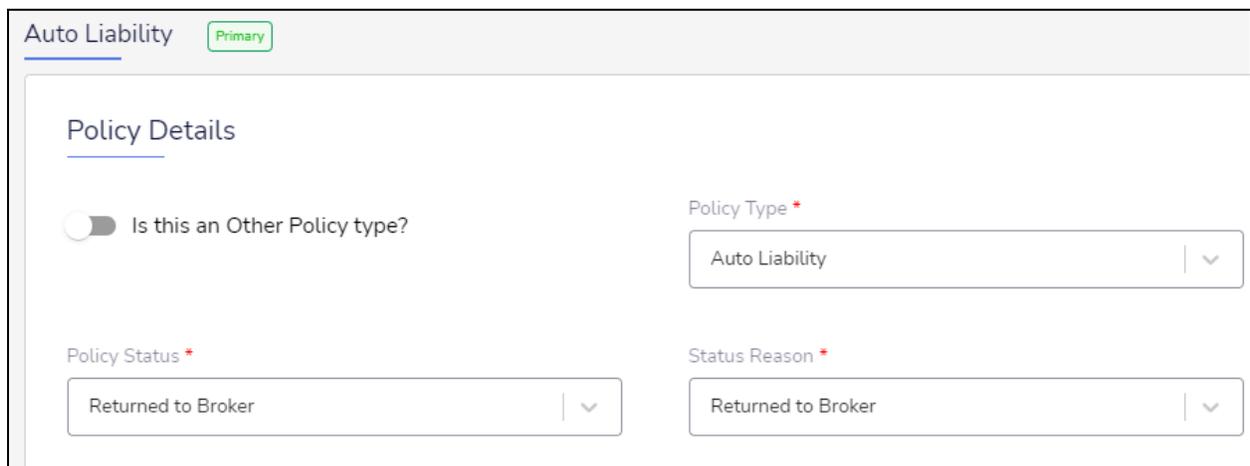
[AM/Jr AM](#) - [CS](#) - [AMS Population](#)

Returned to Broker = Do not service = Back to our partner

- Partner request to take back accounts from Layr.
- [AM](#) creates a task, notates and pastes the Hubspot link in the task.
 - ◆ [AM](#) to make sure all relevant documents are sent to the partner.
- Go into Layr portal, pull up the account and for each line click on the 3 blue dots then “Edit Policy”



- Scroll to policy details & update Policy Status & Status Reason to “Return to Broker”

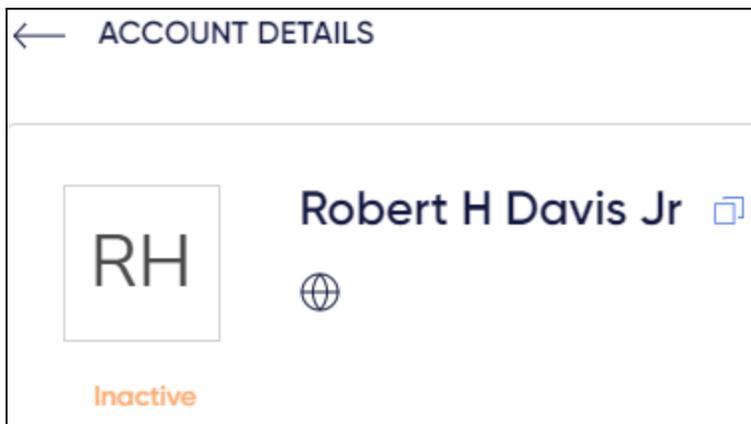
A screenshot of a web form titled "Auto Liability" with a "Primary" status tag. The form is under the "Policy Details" section. It contains a toggle switch for "Is this an Other Policy type?". Below this are four dropdown menus: "Policy Type" (set to "Auto Liability"), "Policy Status" (set to "Returned to Broker"), "Status Reason" (set to "Returned to Broker"), and another "Policy Status" dropdown (set to "Returned to Broker").

- Click save then Submit at the bottom.

Deactivating Account: [Click to watch demo](#)

→ Only if all policies have returned to broker:

- ◆ Click on “More Actions” at the account level
- ◆ Click Edit
- ◆ At description of operations enter:
 - Date & reason returning to broker Ex. 5/14/24 - Per partner request
- ◆ Click Submit
- ◆ Click on “More Actions” again
- ◆ Click on “Deactivate”
- ◆ This will change the account from “Active” to “Inactive”



→ Notate & completes to close task

Partner accountable to code policies in their AMS system