

Add or Delete a Driver on an Auto Policy

PolicyCenter



Description:

This job aid reviews how to add or delete a driver on a bound Auto or PowerSports policy. The navigation steps are the same for both lines of business.

Two procedures are discussed in this job aid:

- [Add a Driver](#)
- [Delete a Driver](#)

If deleting a driver due to Divorce/Separation or Deceased Named Insured, see the [Life Events Job Aid](#).

Add a Driver

Step 1

Action	Screen
<p>Open an existing policy:</p> <ul style="list-style-type: none"> • Click the Actions button. • Select “Change Policy” from the drop-down menu. 	

Step 2

Action	Screen
<p>On the <i>Start Policy Change</i> screen, the Effective date field defaults to the current date.</p> <ul style="list-style-type: none"> • If needed, you may enter a new date in the Effective Date field. • Click the Next > button. 	

Job Aid Process (Add a Driver Cont.) :

Step 3

Action	Screen
<p>On the <i>Policy Info</i> screen:</p> <ul style="list-style-type: none"> Click the Drivers link. 	

Step 4

Action	Screen
<p>On the <i>Drivers</i> screen:</p> <ul style="list-style-type: none"> Click the Add button. Select “New Person” from the drop-down list. 	



Job Aid Process (Add a Driver Cont.) :

Step 5

Action	Screen
<p>In the <i>Driver Details</i> section:</p> <ul style="list-style-type: none"> Enter the necessary information in the required fields. This includes: <ul style="list-style-type: none"> First Name Last Name Driver Type Principal Driver Date of Birth Marital Status Gender Relationship to Insured Financial Responsibility Filing Required (defaults to No) Age First Licensed (defaults to 16) License State License # (not required for quoting but required for issuing the policy) <p>Note: If adding a driver to a PowerSports Pleasure Boatowners policy, an additional field (Years of Boating Experience) is also required.</p> <ul style="list-style-type: none"> Review all listed drivers on the policy to ensure the driver information is accurate and complete. Click the Quote button. 	

Step 6

Action	Screen
<p>On the <i>Quote</i> screen:</p> <ul style="list-style-type: none"> Click the Issue Change button. On the pop-up confirmation window, click the OK button. 	



Job Aid Process (Add a Driver Cont.) :

Step 7

Action	Screen
<p>You have successfully added a Driver.</p>	<p>The screenshot shows a confirmation message: "Your Policy Change (#16498865) has been bound." Below the message are links for "View your policy (#9113J 100080)", "Documents", "Review Changes", and "Go to your desktop". A "Required" section lists "Trailing Documents".</p>

Remove a Driver

Step 1

Action	Screen
<p>Open an existing policy:</p> <ul style="list-style-type: none"> Click the Actions button. Select "Change Policy" from the drop-down menu. 	<p>The screenshot shows the "Actions" menu open with "Change Policy" highlighted. The background shows a policy summary for a Personal Auto policy.</p>

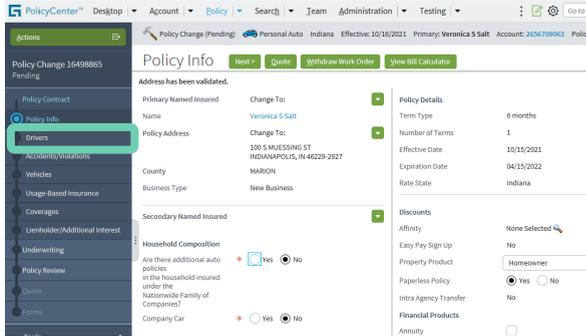
Step 2

Action	Screen
<p>On the <i>Start Policy Change</i> screen, the Effective date field defaults to the current date.</p> <ul style="list-style-type: none"> If needed, you may enter a new date in the Effective Date field. Click the Next > button. 	<p>The screenshot shows the "Start Policy Change" screen with the "Effective Date" field set to 10/16/2021. A "Next >" button is visible.</p>

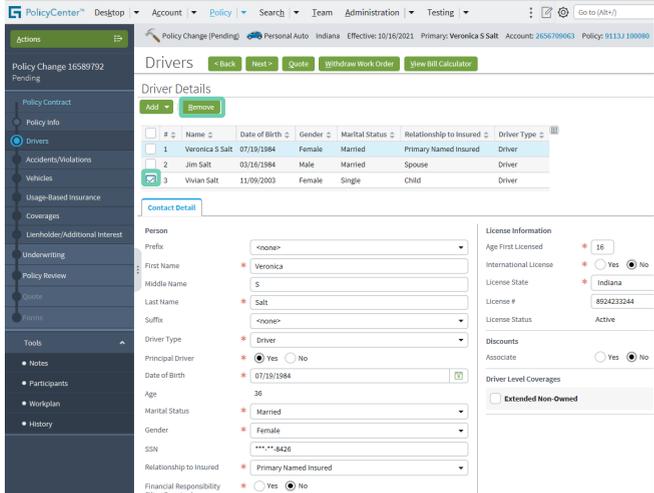


Job Aid Process (Remove a Driver Cont.) :

Step 3

Action	Screen
<p>On the <i>Policy Info</i> screen:</p> <ul style="list-style-type: none"> Click the Drivers link. 	

Step 4

Action	Screen
<p>On the <i>Drivers</i> screen:</p> <ul style="list-style-type: none"> Select the checkbox to the left of the Driver # needing to be removed. Click the Remove button, to delete the selected driver from the policy. 	

Step 5

Action	Screen
<p>On the <i>Drivers</i> screen:</p> <ul style="list-style-type: none"> Review the drivers listed on the policy to ensure the driver has been removed. Click the Quote button. Click the Issue Change button. On the pop-up confirmation window, click the OK button to issue the change. 	