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:

- o Add a Driver
- o <u>Delete a Driver</u>

If <u>deleting</u> a driver due to Divorce/Separation or Deceased Named Insured, see the <u>Life Events Job</u> <u>Aid</u>.

Add a Driver

Step 1	
Action	Screen
Open an existing policy:Click the <u>Actions</u> button.	PolicyCenter* Desktop • Account • Policy • Search • Ieam Administration • Testing • : @ @ Gotol Actors PolicyCenter* Desktop • Account • Policy • Search • Ieam Administration • Testing • : @ @ Gotol Actors PolicyCenter* Desktop • Account • Policy • Search • Ieam Administration • Testing • : @ @ Gotol Actors PolicyCenter* Desktop • Account • Policy • Search • Ieam Administration • Testing • : @ @ Gotol Actors PolicyCenter* Desktop • Account • Policy • Ieam Administration • Testing • : @ @ Gotol Actors PolicyCenter* Desktop • Ieam Administration • Testing • : @ @ Gotol Actors PolicyCenter* Desktop • Account • PolicyCenter* Desktop • Ieam Administration • Testing • : @ @ Gotol Actors PolicyCenter* Desktop • Account • PolicyCenter* Desktop • Ieam Administration • Testing • : @ @ Gotol Actors PolicyCenter* Desktop • Account • PolicyCenter* Desktop • Ieam Administration • Testing • : @ @ Gotol PolicyCenter* Desktop • Account • PolicyCenter* Desktop • Ieam Administration • Testing • : @ @ Gotol PolicyCenter* Desktop • Account • PolicyCenter* Desktop • Ieam Administration • • PolicyCenter* Desktop • • PolicyCenter* Desktop • • PolicyCenter* Desktop • • • PolicyCenter* Desktop • • • • • • • • •
 Select "<u>Change Policy</u>" from the drop- down menu. 	Drivers Jew Note Accidenter_Viviations Verwickets Spin-off Pailory from this One Usage Balaced Instance Coverages Leeholder/Additional. Quote Coverages Leeholder/Additional. Quote Transfer/Rewrite Policy from this One Coverages Leeholder/Additional. Quote Coverages Leeholder/Additional. Quote Torus Torus Torus Torus Torus Coverages Leeholder/Additional. Quote Coverages Leeholder/Additional. Quote Torus Torus Torus Torus Coverages Leeholder/Additional. Quote Coverages Leeholder/Additional. Quote Coverages Leeholder/Additional. Quote Coverages Leeholder/Additional. Coverages Leeholder/Leeholder Leeholder Leeholder/Leeholder Leeholder L
Step 2	
Action	Screen
On the <i>Start Policy Change</i> screen, the Effective date field defaults to the current date.	PolicyCenter® Designop Account Policy Search Ieam Administration Testing E Policy Center Policy Center Policy File Policy File Policy Centract Policy Centract Policy Centract Policy Info Po
 If needed, you may enter a new date in the Effective Date field. 	Accidenta/Molations Vehicles Usage Based Insurance Coverages Lienholder/Additional

Add or Delete a Driver on an Auto Policy PolicyCenter



Job Aid Process (Add a Driver Cont.) :

Step 3

Action	Screen
On the <i>Policy Info</i> screen:	🕞 PolicyCenter" Desktop • Account • Bolicy • Search • Ieam Administration • Testing • 🕴 😰 💿
	Actions 🖶 🔨 Policy Change (Pending) 🐗 Personal Auto Indiana Effective: 10/16/2021 Primary: Veronica S Salt. Account: 255/100403 Policy
Click the Drivers link	Policy Change 16438865 Policy Info Next> Guote Webdraw Work Order Mew Bill Calculator
ener the Drivers link.	Policy Contract Primary Named Insured Change To: Policy Details
	Name Veronica SSalt Term Type 6 months
	Policy Address Change To: Number of Terms 1 100 S MUESSING ST Effortue Data
	INDIANAPOLIS, IN 46229-2927 Expiration Date 04/15/2022
	Usage Based Insurance Business Type New Business Rate State Indiana
	Coverages Secondary Named Insured
	Leenbolder/Additional Interest Underwriting Household Composition Easy Pay Sign Up No
	Are there additional auto * Projecty Product Homeowner
	Coste Hotomoteska ruskes Paperies Policy Ves No No
	Company Car * Ves No Financial Products
Step 4	
Action	Screen
On the Drivene concern	🔽 PolicyCenter" Desktop 🔻 Account 💌 Policy 👻 Search 👻 Ieam Administration 👻 Testing 👻 🔅 🙆 Go to (Alt+)
On the <i>Drivers</i> screen:	Actions 😜 🔨 Policy Change (Pending) 🚓 Personal Auto Indiana Effective: 10/16/2021 Primary: Veronica S Salt Account: 2656709063 Policy: 5113J 100080
	Policy Change 16498865 Drivers stack Next> Quote Withdraw Work Order View Bill Calculator
Click the Add button.	Pending
	Policy Contract.
• Salast "Now Dangon" from the drop	Drivers Dete of Birth Gender Marital Status Relationship to Insured Driver Type
- Select <u>Ivew Ferson</u> from the drop-	Accidents/Wolations 2 Jim Salt 03/16/1984 Male Married Spouse Driver
down list.	Vehicles Contact Detail Contact Detail
	Cost of the second seco





Add or Delete a Driver on an Auto Policy PolicyCenter



Job Aid Process (Add a Driver Cont.) :

Step 5

Action

Screen

□ # ↓ Name ↓ Date of Birth ↓ Gender ↓ Marital Status ↓ Relationship to Insured ↓ Driver Type ↓ ■

🔨 Policy Change (Pending) 💏 Personal Auto Indiana Effective: 10/16/2021 Primary: Veronica S Salt Account: 2656709063 Policy: 9113J 100

Primary Named Insured Spouse

Child

Driver

Driver

Driver

License Information

Age First Licensed

License State

Liconso #

License Status

Discounts

Associate

Good Student

1

-

International License

Additional Information

Student living over 100 miles away without a car

Driver Level Coverages

Extended Non-Owned

* 16

Ves No

1550688990

Yes 🔘 No

🔿 Yes 💿 No

🔵 Yes 💿 No

Active

🔽 PolicyCenter" Desktop | 🗸 Account | 🗸 Policy | 🗸 Search | 🗸 Ieam Administration | 🗸 Testing | 🗸 🔅 🖗 Go to (Alt+/)

Drivers < Back Next > Quote Withdraw Work Order View Bill Calculator

1 Veronica S Salt 07/19/1984 Female Married
 2 Jim Salt 03/16/1984 Male Married

3 Vivian Salt 11/09/2004 Female Single

<none>

* Vivian

* Salt

* Driver

15

* Single

* Female

* Child

***-**-2845

* 🔿 Yes 💿 No

<none>

* • Yes • No

* 11/09/2004

Driver Details

Add - Remove

Contact Detail

Person

Profix

Suffix

Driver Type

Principal Driver

Date of Birth

Marital Status

Relationship to Insured Financial Responsibility Filing Required

Gender

SSN

First Name

Middle Name

Usage-Based Insurance

Lienholder/Additional In

Participant:

Workplan

History

In the Driver Details section:

- Enter the necessary information in the required fields. This includes:
 - o First Name
 - o 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)

Note: If adding a driver to a PowerSports Pleasure Boatowners policy, an additional field (**Years of Boating Experience**) is also required.

- Review all listed drivers on the policy to ensure the driver information is accurate and complete.
- Click the **Quote** button.

Step 6 Action Screen F PolicyCenter™ Desktop | ▼ Agcount | ▼ Policy | ▼ Search | ▼ Ieam Administration | ▼ Testing | ▼ : 🖓 🙆 Go to On the Quote screen: 😰 🔨 Policy Change (Quoted) 🚓 Personal Auto Indiana Effective: 10/16/2021 Primary: Veronica S Salt Account: 2656709063 Policy QUOTE <Back Next> Edit Issue Change Withdraw Work Order View Bill Calculator Click the **Issue Change** button. Policy Number 9113J 100080 Policy Period 10/15/2021 - 04/15/2022 Previous Policy Full Term Premium Primary Named Ir Veronica S Salt \$1,431.24 Policy Address 100 S MUESSING ST INDIANAPOLIS, IN 46229-2927 New Policy Full Term Premium \$1,434.44 On the pop-up confirmation window, • County MARION Full Term Change in \$3.24 RM 15 click the **OK** button. Residual Market Vehicles Summary Premium Details Cost Change Details Applied Discounts/Surcharges Applied Discounts/Surcharges Policy Level Discounts/Surcharges Description 💲 Advance Quote Dis Home and Car Discount Paperless Policy Dis Vehicle Level Discounts/Surcharge



Job Aid Process (Add a Driver Cont.) :

Step 7	
Action	Screen
You have successfully added a Driver.	☐ PolicyCenter" Desktop ▼ Account ▼ Policy ▼ Search ▼ Ieam Administration ▼ Testing ▼ : 📝 🙆 Goto(
	🔨 Policy Change (Bound) 💏 Personal Auto Indiana Effective: 10/16/2021 Primary: Veronica S Salt Account: 2656709063 Policy:
	Policy Change Bound
	Your Policy Change (#1649865) has been bound.
	 View your policy (#9113J 100080)
	Documents
	Review Changes
	Go to your desktop
	Required
	Trailing Documents

Remove a Driver

Step 1		
Action	Screen	
Open an existing policy:	PolicyCenter [®] Des <u>k</u> top × Account × Policy × Search × Ieam Administration × Testing × : C O Gotof Actions Cotom cot	
• Click the <u>Actions</u> button.	Policy Info Create	
 Select "<u>Change Policy</u>" from the drop- down menu. 	Otivers New Vote Associated Policy Transaction • Acadents/Violations New Activity 2555709063 Created 10/16/2021 • Venices Spin off Policy from this One Venoica S Salt Cload 10/16/2021	
	Usage based indurance New Policy Transaction Coverages Change Policy Personal Auto Personal Aut	
	Quote Control only 2011 Control on	
	County MARION Producer of Service Contacts C	

Step 2

Action	Screen
 On the <i>Start Policy Change</i> screen, the Effective date field defaults to the current date. If needed, you may enter a new date in the Effective Date field. 	PolicyCenter® Desktop V Account V Bolicy V Search V Ieam Administration V Testing V : 0 to to 1 Actions Policy File Account 2556709063 Policy 9113 J 100090 In Force (Expiration: 04/15/2 Policy Info Pol
• Click the Next > button.	Coverages Lienholder/Additional Quote Forms



Add or Delete a Driver on an Auto Policy PolicyCenter



Job Aid Process (Remove a Driver Cont.) :

Step 3

Action	Screen
 On the <i>Policy Info</i> screen: Click the Drivers link. 	NoticyContext** Decktop: Account Account
Step 4	

On the *Drivers* screen:

• Select the checkbox to the left of the **Driver** # needing to be removed.

Action

• Click the **<u>Remove</u>** button, to delete the selected driver from the policy.

Screen



Step 5

Action	Screen
On the <i>Drivers</i> screen:	RobyCanner® Destroy Account • Barry • Sendy • Tentory • If (I) Tentory • Ten
• Review the drivers listed on the policy to ensure the driver has been removed.	Driver Details Driver D
• Click the Quote button.	Corregin Period Linear effortable Linear effort
• Click the Issue Change button. On the pop-up confirmation window, click the OK button to issue the change.	Shifty myope Shifty Myope Der P Der P Der P Tota Proceedant Der P Notad Stratter Der N