

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.	

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PolicyCenter



Job Aid Process (Add a Driver Cont.) :

Step 3

Action

On the *Policy Info* screen:

- Click the **Drivers** link.

Screen

Step 4

Action

On the *Drivers* screen:

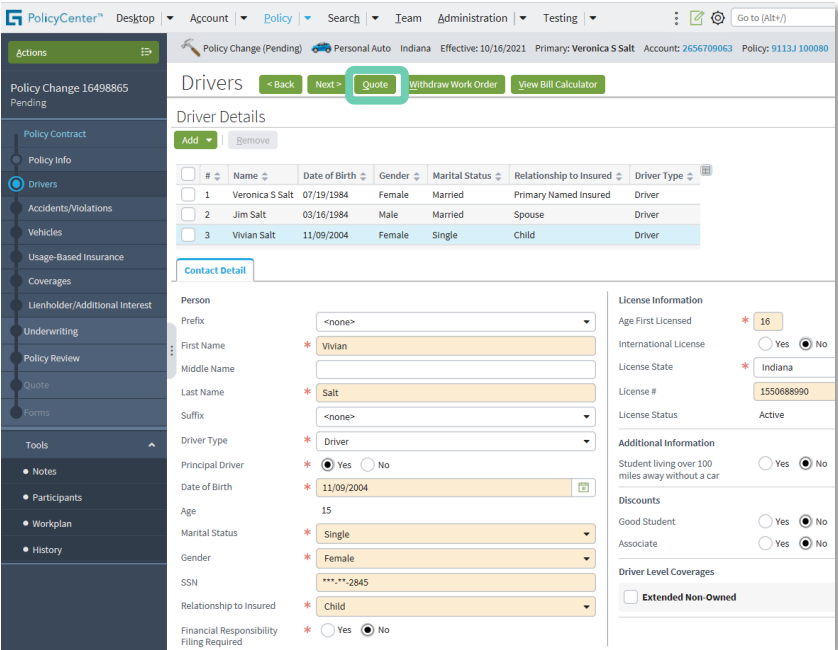
- Click the **Add** button.
- Select "**New Person**" from the drop-down list.

Screen

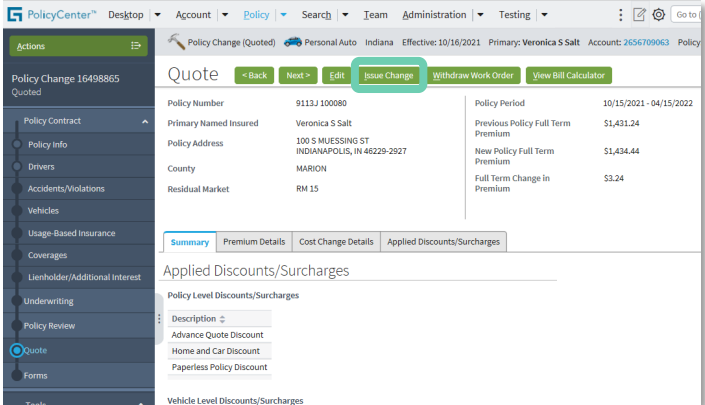


Job Aid Process (Add a Driver Cont.) :

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 NameLast NameDriver TypePrincipal DriverDate of BirthMarital StatusGenderRelationship to InsuredFinancial Responsibility Filing Required (defaults to No)Age First Licensed (defaults to 16)License StateLicense # (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.	

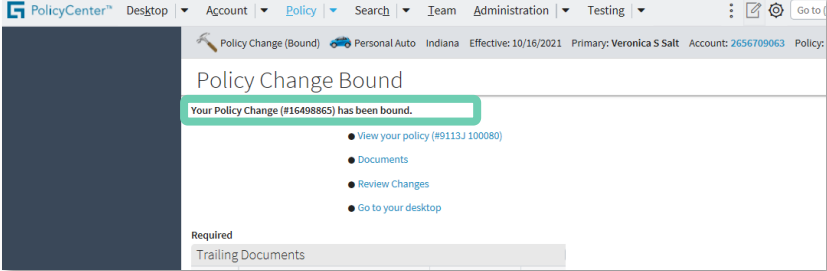
Step 6

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.	



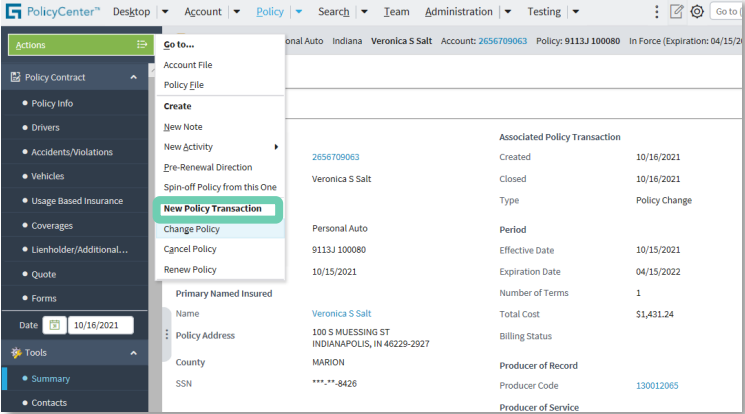
Job Aid Process (Add a Driver Cont.) :

Step 7

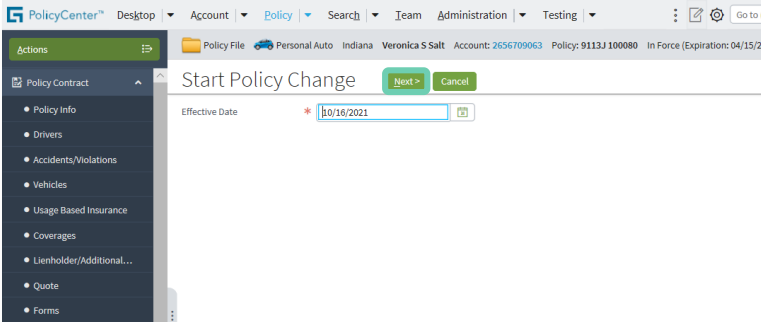
Action	Screen
You have successfully added a Driver.	 The screenshot shows the PolicyCenter interface with a message box stating "Your Policy Change (#16498865) has been bound." Below the message are links for "View your policy (#9113J 100080)", "Documents", "Review Changes", and "Go to your desktop".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

Remove a Driver

Step 1

Action	Screen
Open an existing policy: <ul style="list-style-type: none">Click the Actions button.Select "Change Policy" from the drop-down menu.	 The screenshot shows the PolicyCenter interface. The "Actions" menu is open, displaying options like "Policy Info", "Drivers", "Accidents/Violations", "Vehicles", "Usage Based Insurance", "Coverages", "Lienholder/Additional...", "Quote", "Forms", "Tools", "Summary", and "Contacts". The "Change Policy" option is highlighted under the "New Policy Transaction" section. The background shows policy details for a Personal Auto policy.

Step 2

Action	Screen
On the <i>Start Policy Change</i> screen, the Effective date field defaults to the current date. <ul style="list-style-type: none">If needed, you may enter a new date in the Effective Date field.Click the Next > button.	 The screenshot shows the "Start Policy Change" screen in PolicyCenter. The "Effective Date" field is highlighted, showing a default date of 10/16/2021. There are "Next >" and "Cancel" buttons. The background shows policy details for a Personal Auto policy.



Job Aid Process (Remove a Driver Cont.) :

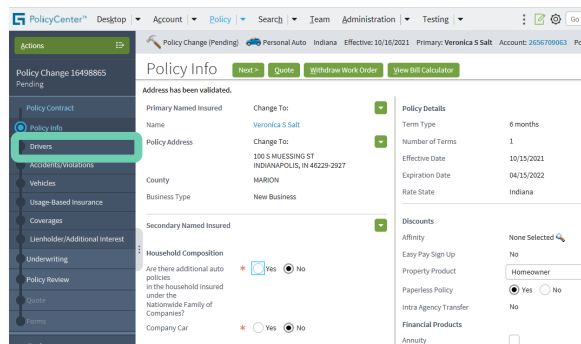
Step 3

Action

On the *Policy Info* screen:

- Click the **Drivers** link.

Screen



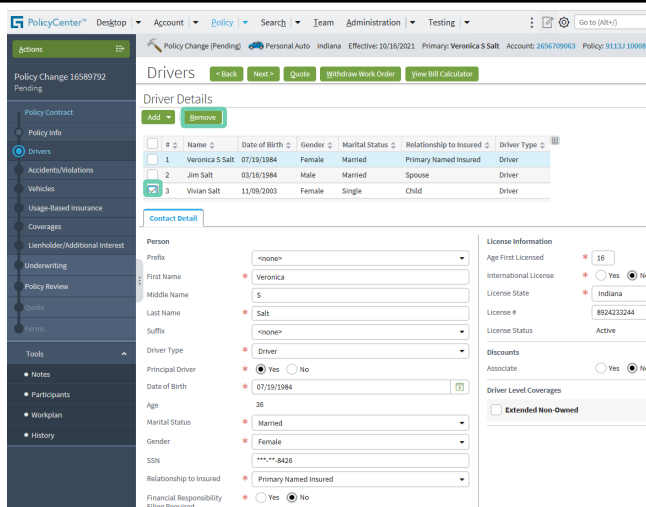
Step 4

Action

On the *Drivers* screen:

- 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.

Screen



Step 5

Action

On the *Drivers* screen:

- 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.

Screen

