

Add or Delete Secondary Named Insured

In Brief

In this Quick Card, you will walk through adding and then deleting an additional named insured on an existing Auto policy.

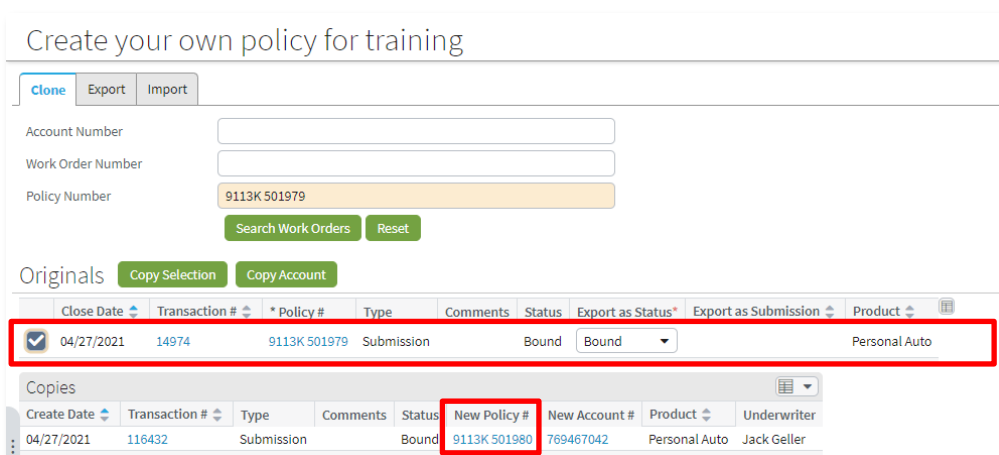
Log in to the [VTO](#) using the appropriate generic user account from the **VTO Information Guide** document.

Quick Card

IMPORTANT: This is a test environment. The next seven (7) steps are ONLY used in the VTO.

Clone the Policy

1. Click the down arrow to the right of the **Training** button on the **Tab Bar**. Select **"Create your own policy for training"** from the drop-down menu.
2. Enter **"9113K 501979"** in the **Policy Number** field exactly as it is shown, including spaces and capital letters.
3. Click the **Search Work Orders** button.
4. In the *Originals* section, click the checkbox to the left of the **Submission** Transaction Type for the policy being cloned. In this example, select the checkbox to the left of Transaction #**14974**.



5. Click the **Copy Selection** button.
Note: If the *Copies* section does not automatically populate, click on the **Search** tab, then back on the **Training** tab. The clone information should be visible.
6. Scroll down, if necessary, to the *Copies* section.
7. Click the link in the **New Policy #** column.

IMPORTANT: PolicyCenter automatically created a **New Account #**. The new account is linked to the *cloned* policy, not the original.



Add Secondary Named Insured

Summary screen

8. Click the **A**ctions button.
9. Select “**C**hange Policy” from the drop-down menu.

Start Policy Change screen

10. PolicyCenter defaults the **E**ffective Date to the current system date. If necessary, you can change the date to a future date. In this example, accept the current date.
11. Click the **N**ext > button.

Policy Info screen

12. In the *Secondary Named Insured* section, click the arrow to the right of the **S**econdary **N**amed **I**nsured field.
13. Select “**E**xisting **C**ontact” from the drop-down list.
14. Select “**S**hannon” from the drop-down list.

NOTE: If the secondary named insured is not already a driver on the policy, you will need to select “**N**ew **P**erson” from the drop-down list and complete the *New Secondary Named Insured* screen using the same address as the Primary Named Insured.

15. Click the **Q**uote button.

IMPORTANT: This is a test environment. This data is not valid. The VTO is not connected to the rating system, but in production, you will see the correct premium.

Quote screen

16. Click the **I**ssue **C**hange button.
17. Click the **O**K button.

Policy Change Bound screen

PolicyCenter displays the message, “*Your Policy Change (#XXXX) has been bound.*”

Delete Secondary Named Insured

Policy Change Bound screen

18. Click the **View your Policy (#XXXX)** link to access the same policy used for “Add Secondary Named Insureds”.

Summary screen

19. Click the **Actions** button.
20. Select “**Change Policy**” from the drop-down menu.

Start Policy Change screen

21. PolicyCenter defaults the **Effective Date** to the current system date. If necessary, you can change the date to a future date. In this example, accept the current date.
22. Click the **Next >** button.

Policy Info screen

23. In the *Secondary Named Insured* section, click the down arrow to the right of **Kendra Salt**.
24. Select “**Remove**” from the drop-down list.
25. Click the **Quote** button.

IMPORTANT: This is a test environment. This data is not valid. The VTO is not connected to the rating system, but in production, you will see the correct premium.

Quote screen

26. Click the **Issue Change** button.
27. Click the **OK** button.

Policy Change Bound screen

PolicyCenter displays the message, “*Your Policy Change (#XXXX) has been bound.*”