

# Manually Remove an Underlier From an Umbrella Policy

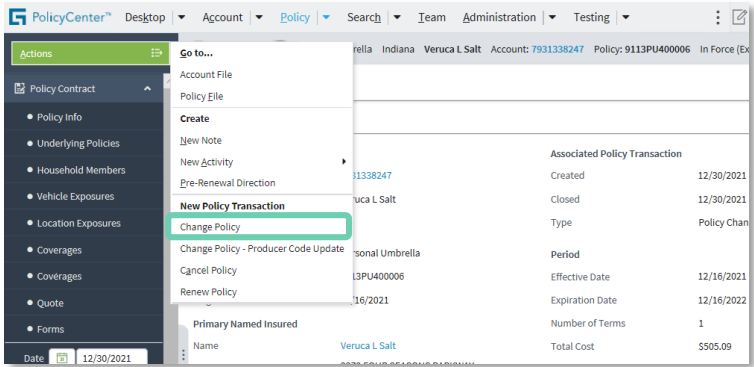
## PolicyCenter



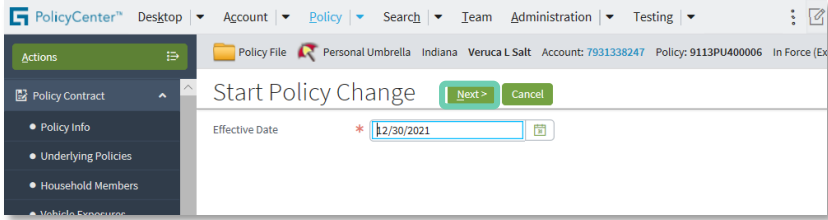
### Description:

This job aid reviews how to manually remove an underlier. The process is the same regardless of which underlier is to be removed.

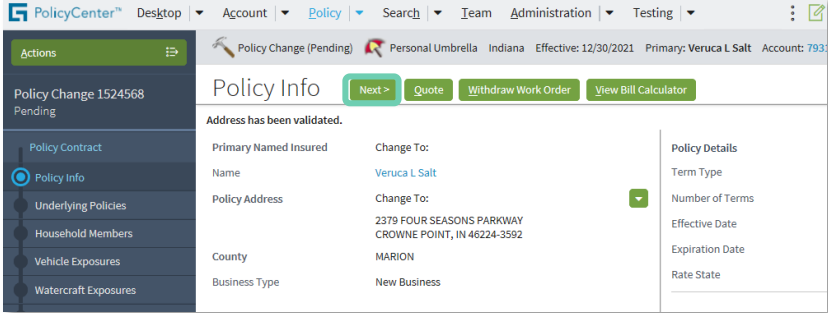
### Step 1

Action	Screen
<p>Navigate to an existing Umbrella policy.</p> <ul style="list-style-type: none"> <li>Click the <b>Actions</b> button.</li> <li>Select <b>"Change Policy"</b> from the drop-down menu.</li> </ul>	

### Step 2

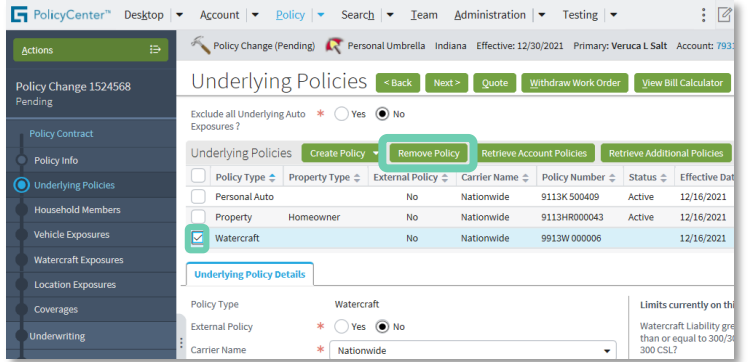
Action	Screen
<p>On the <i>Start Policy Change</i> screen, the <b>Effective Date</b> field defaults to the current date.</p> <ul style="list-style-type: none"> <li>Enter the appropriate information in the <b>Effective Date</b> field.</li> <li>Click the <b>Next &gt;</b> button.</li> </ul>	

### Step 3

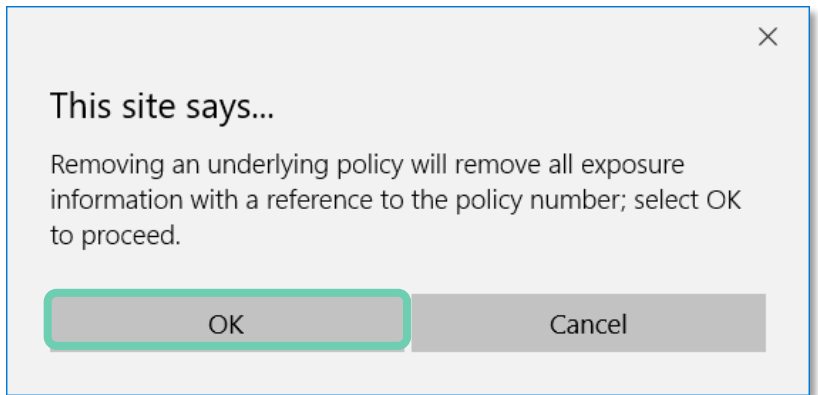
Action	Screen
<p>On the <i>Policy Info</i> screen:</p> <ul style="list-style-type: none"> <li>Click the <b>Next &gt;</b> button.</li> </ul>	

### Job Aid Process (Cont.) :

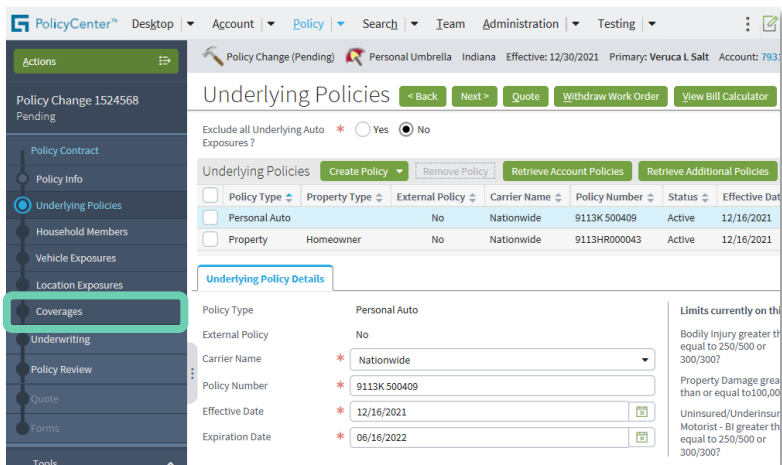
#### Step 4

Action	Screen
<p>On the <i>Underlying Policies</i> screen, you will remove the underlier.</p> <p>In this example, you will remove the Watercraft underlier.</p> <ul style="list-style-type: none"> <li>Select the checkbox to the left of the underlier to be removed.</li> <li>Click the <b>Remove Policy</b> button.</li> </ul>	

#### Step 5

Action	Screen
<p>A warning message displays alerting the user that by removing the underlier, all associated exposure information will also be removed.</p> <ul style="list-style-type: none"> <li>Click the <b>OK</b> button.</li> </ul>	

#### Step 6

Action	Screen
<p>In the <i>Underlying Policies</i> section:</p> <ul style="list-style-type: none"> <li>Validate the underlier has been removed.</li> <li>Click the <b>Coverages</b> link.</li> </ul>	

### Job Aid Process (Cont.) :

#### Step 7

##### Action

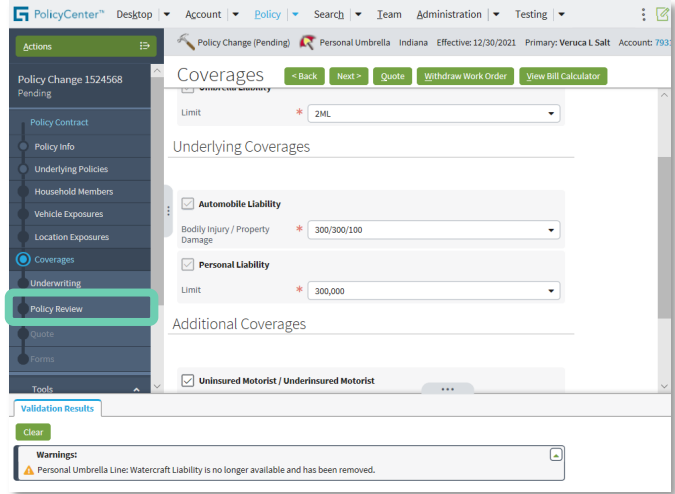
The *Validation Results* section informs the user Watercraft Liability coverage has been removed.

- Click the **Clear** button to clear the message.

**Note:** The Watercraft Liability coverage has been removed in the *Underlying Coverages* section on the *Coverages* screen.

- Click the **Policy Review** link, to review the changes to the policy.

##### Screen



#### Step 8

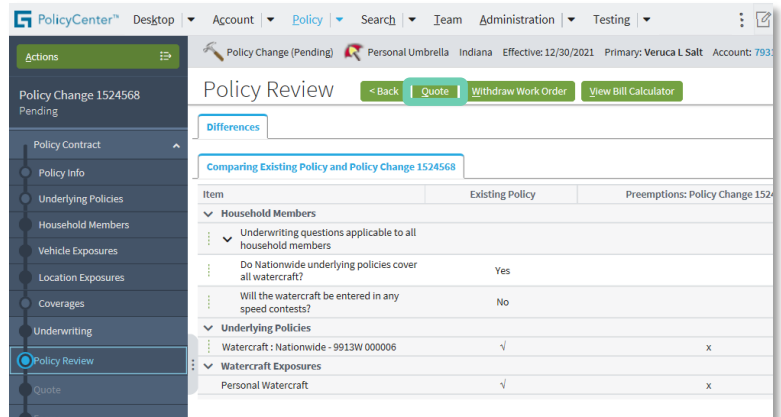
##### Action

On the *Policy Review* screen:

- Click the **Quote** button.

**Note:** An “x” indicates the line item has been removed from the policy. A check mark indicates the line item has been added to the policy.

##### Screen



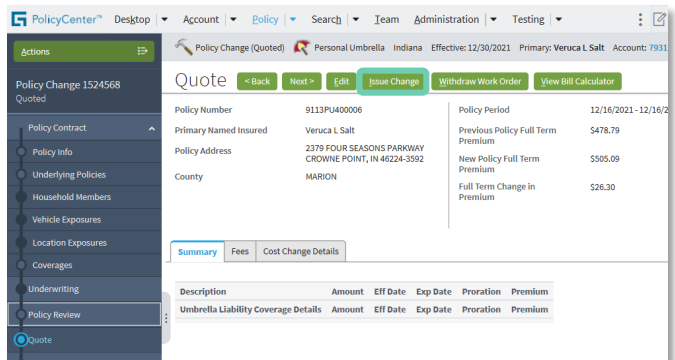
#### Step 9

##### Action

On the *Quote* screen:

- Click the **Issue Change** button.
- Click the **OK** button on the confirmation pop-up window.

##### Screen





Job Aid Process (Cont.) :

Step 10

Action	Screen
The <i>Policy Change Bound</i> screen displays confirming the binding of the policy change.	

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