

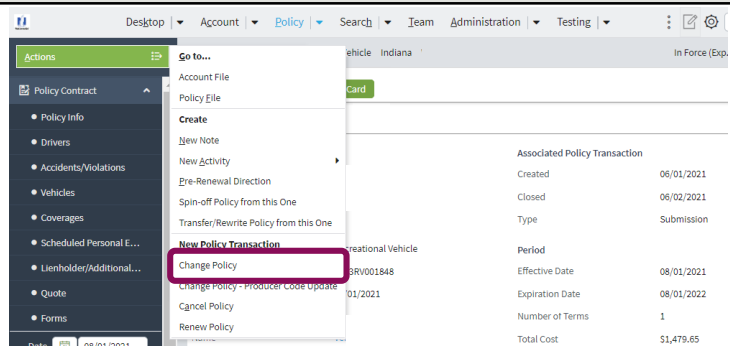


Add, Replace, or Remove a Recreational Vehicle on an Existing Powersports Policy

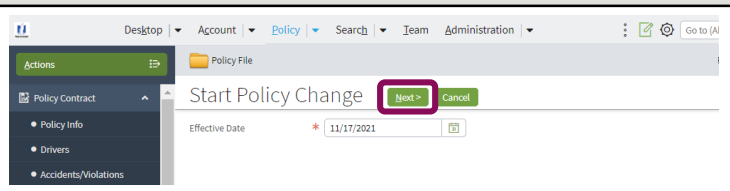
Description

This job aid reviews how to add, replace, or remove a Recreational Vehicle on an existing Powersports policy.

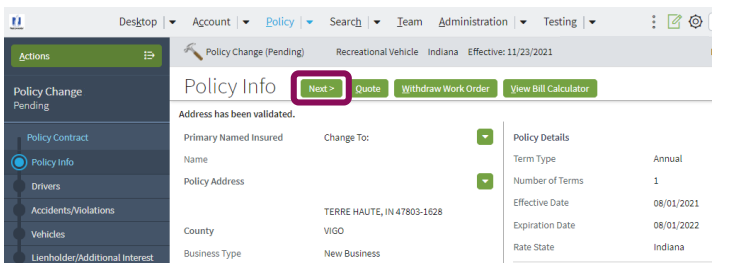
Step 1

Action	Screen
Open an existing Recreational Vehicle (RV) policy: Select the “Actions” button. Select “Change Policy” from the drop-down menu.	 <p>The screenshot shows the 'Policy Info' screen for a Recreational Vehicle policy. The 'Actions' menu is open, and 'Change Policy' is highlighted. The menu options include: Policy Contract, Policy Info, Drivers, Accidents/Violations, Vehicles, Coverages, Scheduled Personal E..., Lienholder/Additional..., Quote, and Forms. The 'Change Policy' option is circled in red.</p>

Step 2

Action	Screen
On the “Start Policy Change” screen. The “Effective Date” field defaults to today's date. If the customer purchased the RV on a different date, change it to reflect the correct date. Select the “Next” button.	 <p>The screenshot shows the 'Start Policy Change' screen. The 'Effective Date' field is set to 11/17/2021. The 'Next' button is highlighted with a red box.</p>

Step 3

Action	Screen
All policy changes start on the “Policy Info” screen. If no changes are needed select the “Next” button.	 <p>The screenshot shows the 'Policy Info' screen. The 'Next' button is highlighted with a red box. The screen displays policy details for a Recreational Vehicle policy, including the primary named insured, policy address, and policy details.</p>

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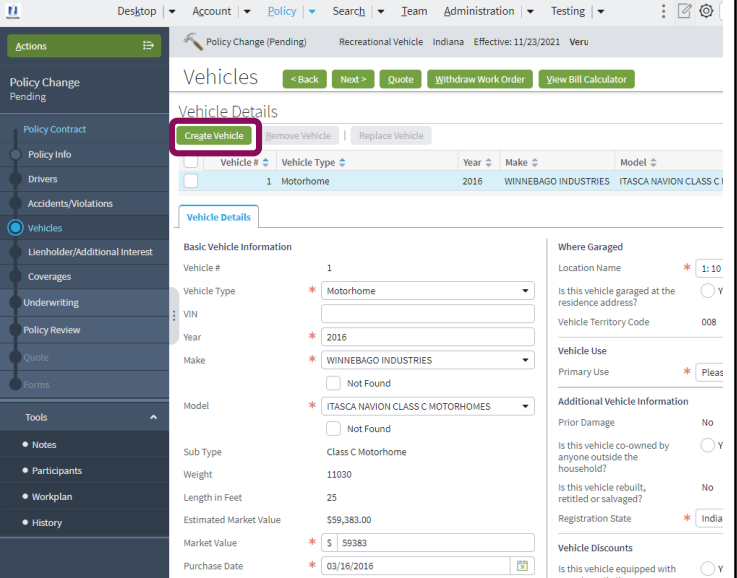


Select the appropriate link from the list below to continue with the policy change.

- [Add a Vehicle](#)
- [Replace a Vehicle](#)
- [Remove a Vehicle](#)

Add a Vehicle

Step 4

Action	Screen
On the “Vehicles” screen: Select the “Create Vehicle” button.	

Add, Replace, or Remove a Recreational Vehicle on an Existing Powersports Policy



Step 5

Action	Screen
<p>In the “Vehicle Details” section:</p> <p>Complete all required fields. You may need to scroll to view/complete all fields.</p> <p>Note: VIN look-up services are not available for Powersports Recreational Vehicle policies. You must manually complete all fields.</p> <p>Complete the “Market Value” and “Purchase Date” fields.</p> <p>Select the “Next” button.</p>	

Step 6

Action	Screen
<p>On the “Coverages” screen:</p> <p>Verify all coverages for the added vehicle and update if necessary.</p> <p>Select the “Next” button.</p>	

Step 7

Action	Screen
<p>In the “Policy Review” section:</p> <p>Review the coverage changes for the revised policy. If changes need to be made, select the “Back” button and make revisions.</p> <p>If everything is correct select the “Quote” button.</p>	

Add, Replace, or Remove a Recreational Vehicle on an Existing Powersports Policy



Step 8

Action	Screen
<p>On the “Quote” screen:</p> <p>Select the “Issue Change” button.</p> <p>Select the “OK” button on the “Issue Change” pop-up window after reviewing the disclosure statement.</p>	

Step 9

Action	Screen
<p>The “Policy Change Bound” screen displays. This indicates the change is bound.</p>	



Add, Replace, or Remove a Recreational Vehicle on an Existing Powersports Policy



Replace a Vehicle

Step 4

Action	Screen
<p>On the “Vehicles” screen:</p> <p>Select the checkbox to the left of the Vehicle # which needs to be replaced.</p> <p>Select the “Replace Vehicle” button.</p>	

Step 5

Action	Screen
<p>In the “Vehicle Details” section:</p> <p>Complete all required fields. You may need to scroll to view/complete all fields.</p> <p>Note: VIN look-up services are not available for Powersports Recreational Vehicles policies. You must manually complete all fields.</p> <p>Complete the “Market Value” and “Purchase Date” fields.</p> <p>Select the “Next” button.</p>	

Add, Replace, or Remove a Recreational Vehicle on an Existing Powersports Policy



Step 6

Action	Screen
<p>If the policyholder has a lienholder complete Steps 6-8, if not, select the “Next” button and move to Step 9.</p> <p>Select the “Add” button.</p> <p>Select “New Company” from the drop-down.</p>	

Step 7

Action	Screen
<p>On the “New Additional Interest” screen, select the “Third Party Type” and complete the “Contact Detail” section.</p> <p>When finished, select “OK.”</p>	

Step 8

Action	Screen
<p>You will return to the “Lienholder/Additional Interest” screen.</p> <p>If the information is available, fill in the “Expiration Date” and “Loan Number.”</p> <p>NOTE: The Expiration Date and Loan Number are not required but helpful to aid in future inquiries.</p> <p>Select “Next” to move on to “Coverages.”</p>	

Add, Replace, or Remove a Recreational Vehicle on an Existing Powersports Policy

Step 9

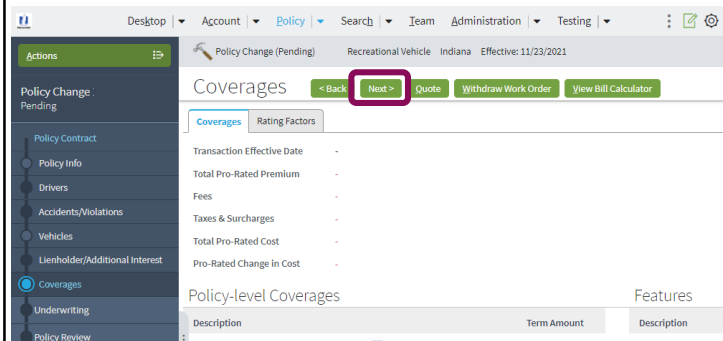
Action

On the “Coverages” screen:

Verify all coverages for the replacement vehicle and update if necessary.

Select the “Next” button.

Screen



Desktop | Account | Policy | Search | Team | Administration | Testing | Go

Policy Change (Pending) Recreational Vehicle Indiana Effective: 11/23/2021

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

Coverages Rating Factors

Transaction Effective Date -
Total Pro-Rated Premium -
Fees -
Taxes & Surcharges -
Total Pro-Rated Cost -
Pro-Rated Change in Cost -

Policy-level Coverages Features

Description	Term Amount	Description

Step 10

Action

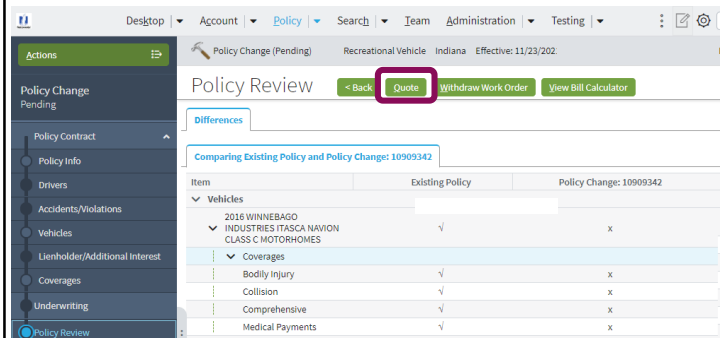
In the “Policy Review” section:

Review the coverage changes for the revised policy.

If changes need to be made, select the “Back” button and make revisions.

If everything is correct, select the “Quote” button.

Screen



Desktop | Account | Policy | Search | Team | Administration | Testing | Go

Policy Change (Pending) Recreational Vehicle Indiana Effective: 11/23/2022

Policy Review < Back Quote Withdraw Work Order View Bill Calculator

Differences

Comparing Existing Policy and Policy Change: 10909342

Item	Existing Policy	Policy Change: 10909342
✓ Vehicles		
2016 WINNEBAGO INDUSTRIES TRASCIA NAVION CLASS C MOTORHOMES	✓	x
✓ Coverages		
Bodily Injury	✓	x
Collision	✓	x
Comprehensive	✓	x
Medical Payments	✓	x

Step 11

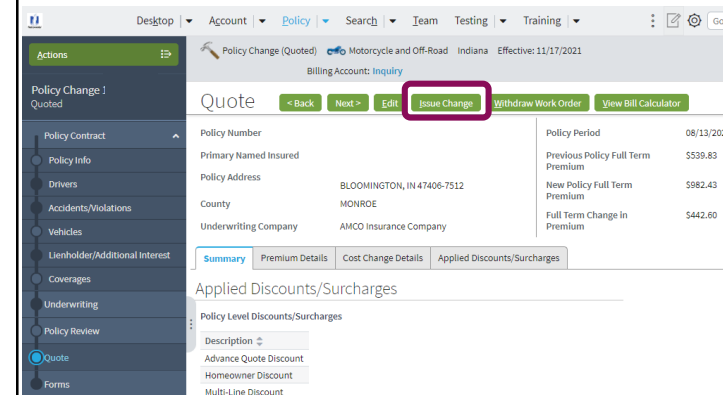
Action

On the “Quote” screen:

Select the “Issue Change” button.

Select the “OK” button on the “Issue Change” pop-up window after reviewing the disclosure statement.

Screen



Desktop | Account | Policy | Search | Team | Testing | Training | Go

Policy Change (Quoted) Motorcycle and Off-Road Indiana Effective: 11/17/2021

Quote < Back Next > Edit Issue Change Withdraw Work Order View Bill Calculator

Policy Number
Primary Named Insured
Policy Address
County
Underwriting Company

Policy Period
Previous Policy Full Term Premium
New Policy Full Term Premium
Full Term Change in Premium

Summary Premium Details Cost Change Details Applied Discounts/Surcharges

Applied Discounts/Surcharges

Policy Level Discounts/Surcharges

Description
Advance Quote Discount
Homeowner Discount
Multi-Line Discount

Add, Replace, or Remove a Recreational Vehicle on an Existing Powersports Policy



Step 12

Action	Screen
The “Policy Change Bound” screen displays. This indicates the change is bound.	



Remove a Vehicle

Step 4

Action	Screen
<p>On the “Vehicles” screen:</p> <p>Select the checkbox to the left of the Vehicle # to be removed.</p> <p>Select the “Remove Vehicle” button.</p> <p>Select the “Next” button.</p>	

Step 5

Action	Screen
<p>If applicable, verify the Lienholder has been removed.</p> <p>Select the “Next” button.</p>	

Add, Replace, or Remove a Recreational Vehicle on an Existing Powersports Policy

Step 6

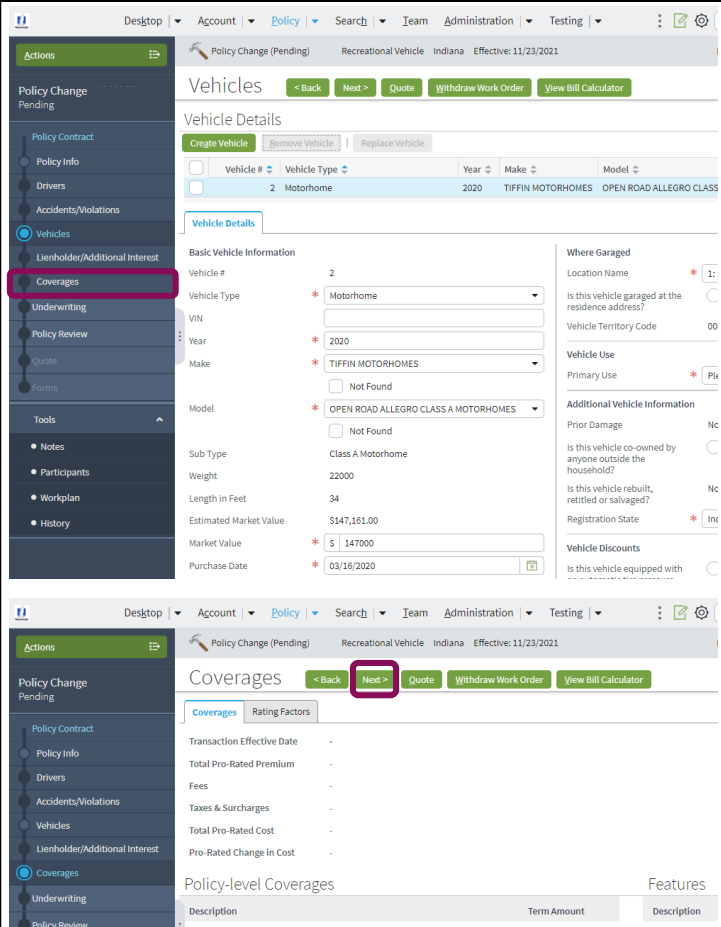
Action

After removing the vehicle:

Select the “Coverages” link to ensure the coverages have also been removed.

Once you have verified the coverages have been removed, select “Next.”

Screen



The screenshot shows the 'Vehicles' screen in the policy change interface. The left sidebar contains a list of actions, with 'Coverages' highlighted. The main content area displays vehicle details for a motorhome. The 'Next' button in the top right corner is highlighted with a red box.

Step 7

Action

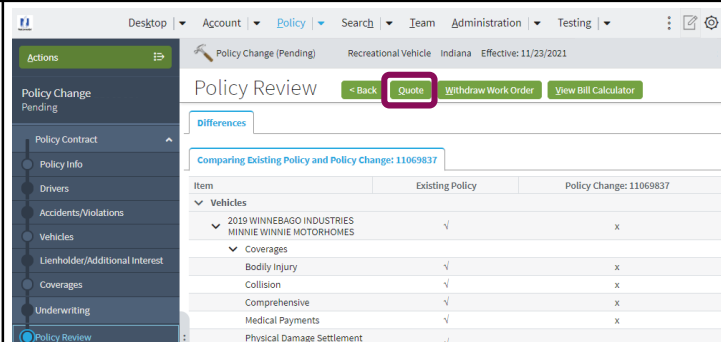
In the “Policy Review” section:

Review the coverage changes for the revised policy.

If changes need to be made, select the “Back” button and make revisions.

If everything is correct, select the “Quote” button.

Screen

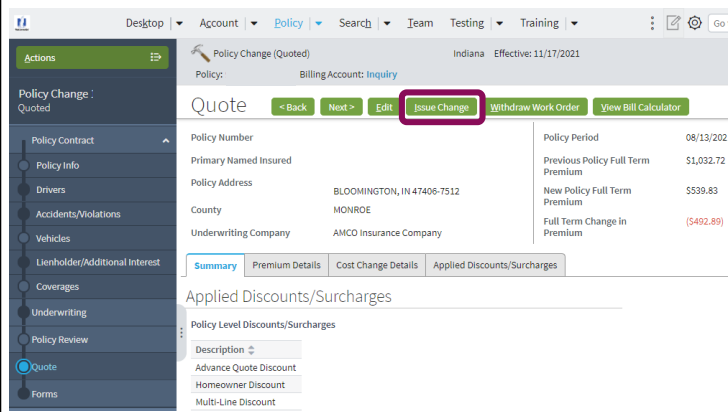


The screenshot shows the 'Policy Review' screen in the policy change interface. The 'Quote' button in the top right corner is highlighted with a red box. The main content area displays a comparison of existing policy and policy change for various coverages.

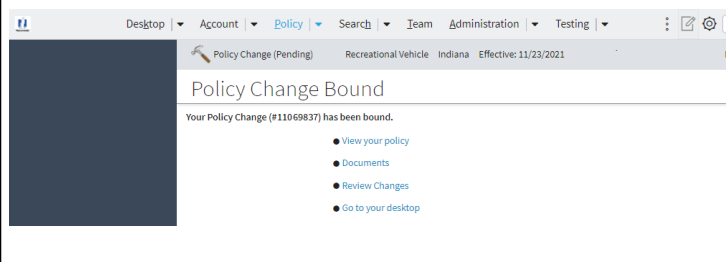
Item	Existing Policy	Policy Change: 11069837
2019 WINNEBAGO INDUSTRIES MINNIE WINNIE MOTORHOMES	✓	x
Bodily Injury	✓	x
Collision	✓	x
Comprehensive	✓	x
Medical Payments	✓	x
Physical Damage Settlement	✓	x

Add, Replace, or Remove a Recreational Vehicle on an Existing Powersports Policy

Step 8

Action	Screen
<p>On the "Quote" screen:</p> <p>Select the "Issue Change" button.</p> <p>Select the "OK" button on the Issue Change pop-up window after reviewing the disclosure statement.</p>	

Step 9

Action	Screen
<p>The Policy Change Bound screen displays. This indicates the change is bound.</p>	



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