Add or Delete a Driver on an Auto Policy (1 of 6)

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. Select the menu items below to navigate.

- 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>.

By accepting a copy of these materials:

(4) I agree that I will return or destroy any material provided to me during this training, including any copies of such training material, when or if any of the following circumstances apply: (a) my Independent Sales Agent agreement with Nationwide is cancelled or I no longer hold any appointments with Nationwide; (b) my employment with or contract with a Nationwide Independent Sales Agent is terminated; (c) my Independent Adjuster contract with Nationwide is terminated; (d) my employment with or contract with a Nationwide Independent Adjuster is terminated; or (e) my employment or contract with Nationwide is terminated for any reason.

⁽¹⁾ I agree that I am either: (a) an employee or Contractor working for Nationwide Mutual Insurance Company or one of its affiliates or subsidiaries ("Nationwide"); or (b) an Independent Sales Agent who has a contract and valid appointment with Nationwide; or (c) an employee of or an independent contractor retained by an Independent Sales Agent; or (d) an Independent Adjuster who has a contract with Nationwide; or (e) an employee of or an independent and valid appointment with Nationwide; or (e) an employee of or an independent and valid appointment with Nationwide; or (e) an employee of or an independent and valid appointment with Nationwide; or (e) an employee of or an independent and valid appointment with Nationwide; or (e) an employee of or an independent appointment with Nationwide; or (e) an employee of or an independent appointment with Nationwide; or (e) an employee of or an independent appointment with Nationwide; or (e) an employee of or an independent appointment with Nationwide; or (e) an employee of or an independent appointment with Nationwide; or (e) an employee of or an independent appointment with Nationwide; or (e) an employee of or an independent appointment with Nationwide; or (e) an employee of or an independent appointment with Nationwide; or (e) an employee of or an independent appointment with Nationwide; or (e) an employee of or an independent appointment with Nationwide; or (e) an employee of or an independent appointment with Nationwide; or (e) an employee of or an independent appointment with Nationwide; or (e) an employee of or an independent appointment with Nationwide; or (e) an employee of or an independent appointment with Nationwide; or (e) an employee of or an independent appointment with Nationwide; or (e) an employee of or an independent appointment with Nationwide; or (e) an employee of or an independent appointment with Nationwide; or (e) an employee of or an independent appointment with Nationwide; or (e) an employee of or an independent appointment with Nationwide; or (

⁽²⁾ I agree that the information contained in this training presentation is confidential and proprietary to Nationwide and may not be disclosed or provided to third parties without Nationwide's prior written consent.

⁽³⁾ I acknowledge that: (i) certain information contained in this training presentation may be applicable to licensed individuals only and access to this information should not be construed as permission to perform any functions that would require a license; and (ii) I am responsible for acting in accordance with all applicable laws and regulations.

Add or Delete a Driver on an Auto Policy PolicyCenter (2 of 6)



Add a Driver

Step 1

Action	Screen
Open an existing policy:	Policy/Center* Dedotop Account Policy Search Ieam Administration Testing Testing Testing Formation Testing Testin
• Click the <u>A</u>ctions button.	Pulicy Contract Policy Ele Policy Ele Drivers Service
• Select " <u>Change Policy</u> " from the drop- down menu.	Accidently/Molations Prefix devices Prefix Pre
	Covering Source Code Update Covering Policy - Producer Code Update Covering Policy - Producer Code Update Covering Policy - Producer Code Update System Source Date Covering Policy - Producer Code Update System Source Date Covering Policy - Producer Code Update System Source Date Covering Policy - Producer Code Update System Source Date Covering Policy - Producer Code Update System Source Date Covering Policy - Producer Code Update System Source Date Covering Policy - Producer Code Update System Source Date Source Date Covering Policy - Producer Code Update System Source Date Source Date Covering Policy - Producer Code Update System Source Date S
	Outring Discl 3 Sail Total Cost \$1,431.24 Image: State 100 S MUESSIN ST INDUARCIES, IN 4022-2927 Billing Status Image: State Country MARCIN Producer of Record Supmary Total Cost State Supmary
Step 2	Ann - Hann Product Cole 1001005

Action	Screen
On the <i>Start Policy Change</i> screen, the Effective date field defaults to the current date.	PolicyCenter* Desistop Account Policy Search Ieam Administration Testing Testing Eller Constant Policy Poli
• If needed, you may enter a new date in the Effective Date field.	Accidents/Volations Values Values Coverages Coverages Lenebol(cr/ddStonal
• Click the <u>Next</u> > button.	• Ques
Step 3	
Action	Screen
On the <i>Policy Info</i> screen:	🔄 PolicyCenter" Desistop + Account + Enlicy + Search + Jean Administration + Testing + 🗄 💽 💿
• Click the Drivers link.	blicy Change 194688600 Policy Change 194688600
	Name Venerical 5 Set Term Type 4 models Drivers Palky Address Change To: Indoxex/CVL, IM, 44225 3927 Term Type 4 models Wahder Down 105 WACKSING ST Indoxex/CVL, IM, 44225 3927 Elsevision Dans 105 W25232 Wahder Country MARON Expiration Dans 04/35/2922 Usinge Bond Imagence Business Rate State Indana
	Coverages Developed in Maximum Ma Maximum Maximum Max

Add or Delete a Driver on an Auto Policy PolicyCenter (3 of 6)



Job Aid Process (Add a Driver Cont.) :

Step 4

Action	Screen
On the <i>Drivers</i> screen:	PolicyCenter* Desistop Account Policy Search Team Administration Testing Testing
 Click the Add button. Select "New Person" from the drop 	Policy Change 16438805 Pording Profing Policy Change 16438805 Pording Policy Change 16438805 Policy Change 16488 Policy Change 1648 Policy Change 164 Policy Ch
down list.	Accidents/Woldstore 2 and Salt 01/26/2044 Pensie Married Primary Name Insured Driver Vehicles Usage Baad Insurance Constant Prival Constant Prival Constant Prival Constant Prival Loose Information
	Lowendary //ddStorad Interest Underwriting Parls
	Pelcy Revew Model Rame S Lonini Full Column Contra Saft Lonini # Baddata Lonini # Baddata Contra Suffix reponal+ Lonini # Lonini # Baddata
	Onliver Other Discounts Tools Principal Onliver * ® Yes No Associate Yes @ No • Notes Date of Birth * @7/39/3844 Other Other Driver (Level Coverages)
	Agr 24 Agr 24 Martal Status Martal Status Ma
	55N ****428

Step 5

Action

In the *Driver Details* section:

- Enter the necessary information in the required fields. This includes:
 - First Name
 - Last Name
 - o 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)
- Review all listed drivers on the policy to ensure the driver information is accurate and complete.
- Click the **Quote** button.



Screen

Add or Delete a Driver on an Auto Policy PolicyCenter (4 of 6)



Job Aid Process (Add a Driver Cont.) : Step 6 Action Screen G Policy : 20 00 On the Quote screen: Policy C Quote <Back Next> Edit Issue Change W der Click the **Issue Change** button. • Policy Number 9113J 100080 10/15/2021 - 04/15/2022 Previous Policy Full Term Primary Named In Veronica S Salt \$1,431,24 100 S MUESSING ST INDIANAPOLIS, IN 46229-2927 Policy Address New Policy Full Term 51,434,44 On the pop-up confirmation window, ٠ 53.24 RM 15 click the **OK** button. Summary Premium Details Cost Change Details Applied Applied Discounts/Surcharges cription : Advance Quote Discourt Home and Car Discount Step 7 Action Screen F PolicyCenter" Desktop - Account - Policy - Search - Ieam Administration - Testing -: C @ Go to You have successfully added a Driver. nal Auto Indiana Effective: 10/16/2021 Primary: Veronica S Salt Policy Change Bound Your Policy Change (#16498865) has been bound. View your policy (#9113.J 100080 Documents Review Changes Go to your desktor Required Trailing Documents

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

Return to Menu

Add or Delete a Driver on an Auto Policy PolicyCenter (5 of 6)



Remove a Driver

Step 1

Action	Screen
Open an existing policy:	PolicyCenter [®] Desktop • Account • Policy • Search • Ieam Administration • Testing • : So Conce So Town So Town
 Click the <u>Actions</u> button. Select "<u>Change Policy</u>" from the drop- down menu. 	Account File Policy Contract Account File Policy File ● Fulsity Info Create ● Fulsity Info Create ● Drivers Server Note ● Wew Address Spin off File Policy Transaction ● Using Based Insurance Coverages ● Coverages Canage Policy ● Luerbolder/Additional. Canage Policy ● Quote Personal Auto ● Policy Canage Policy 9113 100089 ● Forms Defences ● Dicky Address 1015/2021 ● Policy Canage Policy 9113 1100089 ● Policy Canage Policy 9113 1100089 ● Policy Canage Policy 9113 1100089 ● Policy Address 1015/2021 ● Direy Sisteria Premoved Insured ● Policy Address 1005 9.WUSSEND ST ● Direy Address 1005 9.WUSSEND ST
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 	PolicyCenter® Desistop Account Policy Search Ieam Administration Testing Elicy Start Policy Change Policy Policy

- the Effective Date field.
- Click the **<u>N</u>ext** > button.

	Ð	Policy File 🥖	Personal Auto Indiana	Veronica S Salt Account: 2650	5709063 Policy: 9113J 100080	In Force (Expiration: 04/15/2
Policy Contract	^ ^	Start Polic	cy Change	Next > Cancel		
 Policy Info 		Effective Date	* 10/16/2021			
Drivers						
Accidents/Violation	ns					
Vehicles						
Usage Based Insura	ance					
Coverages						
Lienholder/Additio	mal					
Quote						
• Forms						

Step 3

Action	Screen
On the <i>Policy Info</i> screen:Click the Drivers link.	PolicyCenter® Desistop • Account • Extry • Search • Jean Antinistration • Testing • E © © © © © © © © © © © © © © © © © ©

Add or Delete a Driver on an Auto Policy PolicyCenter (6 of 6)



Job Aid Process (Remove a Driver Cont.) :

Step 4

Action	Screen
On the <i>Drivers</i> screen:	FolicyCenter® Destrop Account Policy Change Pending Policy Change Verwick 3 Sait Account 266/10006 Policy Status 10006 Policy Change 15580702 DriVerS Account Quete 3
 Select the checkbox to the left of the Driver # needing to be removed. Click the Remove button to delete the 	Driver Details Pointy Colorad: Active Colorad: A
selected driver from the policy.	Concerging Valued a value Lacholdschuldtorul interest Paylin Paylin Minde value Paylin Minde value Paylin Minde value Status Valued value Paylin Saft Status Saft Status Saft Paylin Saft Status Saft Status Saft Payling Saft Status Saft Payling Payling Payling
Step 5	
Action	Screen
On the <i>Drivers</i> screen:Review the drivers listed on the policy to ensure the driver has been removed.	PhilogContext** Decision + Account (* 1640) (* Search, * Jaam Aphiloidancian (* Trading (*
• Click the Quote button.	Index Stand Tourses Exercise Stand Tourses Exercise Stand Tourses Exercise Stand Tourses Concerning Partin Partin Exercise Stand Tourses Exercise Stand Tourses Value Magneting Partining Exercise Stand Tourses Exercise Stand Tourses Exercise Stand Tourses Value Magneting Partining Exercise Stand Tourses Exercise Stand Tourses Exercise Stand Tourses Value Magneting Exercise Stand Tourses Exercise Stand Tourses Exercise Stand Tourses Exercise Stand Tourses Value Magneting Exercise Stand Tourses Exercise Stand Tourses Exercise Stand Tourses Exercise Stand Tourses
• Click the Issue Change button. On the pop-up confirmation window, click the OK button to issue the change.	Image Date

Return to Menu