Add an Underlier to an Umbrella Policy PolicyCenter

Description:

This job aid reviews how to add a Watercraft underlier to an Umbrella policy. The process to add an underlier to an Umbrella policy is the same for any underlier, when using the **Create Policy** function.

NOTE: Once an underlier is added, the system automatically updates the associated Umbrella policy.

Step 1					
Action	Screen				
Navigate to an existing Umbrella policy.	1 Desktop • Account • Policy • Search • Ieam Administration • Testing • : 2 6 6				
• Click the <u>Actions</u> button.	Actions Go to Fella Indiana Veruca Salt Account # 4340449388 Policy # 9113PU900002 In Force (Ex Account File Policy Contract Policy Elle				
 Select "Change Policy" from the drop-down menu. 	Policy Info Create Mew Note Mew Note Mew Activity Pre-Renewal Direction Location Exposures Change Policy Coverages Change Policy Coverages Change Policy Coverages Change Policy Sonal Umbrella Period Cancel Policy Sonal Umbrella Period Cancel Policy Sonal Umbrella Period Cancel Policy Sonal Umbrella Period Coverage Coverages Change Policy Sonal Umbrella Period Cancel Policy Sonal Umbrella Period Coverage Coverage Coverages Change Policy Sonal Umbrella Period Cancel Policy Sonal Umbrella Period Coverage Primary Named Insured Number of Terms Sonal Umbre of Terms Sonal				
Step 2					
Action	Screen				
 On the Start Policy Change screen, the Effective Date field defaults to the current date. Enter the appropriate information in the Effective Date field. 	Desktop Account Delicy Search Ieam Administration Testing : @ @ G Account + 4340449388 Policy = 9113PU900002 In Force [Ex Policy Info Policy Inf				
Click the <u>Next</u> > button.	Cone Forms				
Step 3					
Action	Screen				
On the <i>Policy Info</i> screen: • Click the Next > button.	Desigtop ▼ Account ▼ Bolicy ▼ Search ▼ Ieam Administration ▼ Testing ▼ E Image: Search Image: Search ▼ Ieam Administration ▼ Testing ▼ E Image: Search Image: Search ▼ Testing ▼ E Image: Search Image: Search ▼ Testing ▼ E Image: Search P Image: Search P Testing ▼ E Image: Search P Image: Search Image: Sear				
	Address has been validated. Policy Contract Primary Named Insured Change To: Policy Orbitals Term Type Address Policy Address Policy Address Change To: Underlying Police Policy Address County Policy Address County Policy Police Document Set Policy Address Type New Business Additional Named Insured Address Policy Police Policy Address Additional Named Insured Name © Description of Interest © Relationship to Primary Named Insured County No data to display Policy Review Preference Exiting Policy Review Preference Exiting Policy Review Preference Exiting Policy Review Policy Review Policy Review Preference Exiting Policy Review Policy Policy Review Policy				



Job Aid Process (Cont.) :

Step 4

Action	Screen
The system automatically displays the <i>Underlying Policies</i> screen when an Auto and/or Property policy exists on the PolicyCenter Account.	Desistop Account Balicy Search I am Administration Testing E E Count Policy Change (Pending) Pending Policy Change (Pending) Policy (Pending)
Step 5	

Action

On the Underlying Policies screen:

- Click the Create Policy button.
- Select "Watercraft" from the drop-down list.

Des <u>k</u> top	· Account · Policy	Searc <u>h</u>	▪ <u>I</u> eam	Administratio	n 🔹 Testing 🖙	:	Ø @
<u>A</u> ctions ∷∋	🔨 Policy Change (Pendi	ng) 📿 Persona	al Umbrella Indi	ana Eff. 02/09/	2022 Veruca Salt Acc	ount # 4340	449388 Policy
Policy Change 16861123	Underlying F	Policies	< Back	Next > Quo	te <u>W</u> ithdraw Transad	tion <u>V</u> ie	ew Bill Calculate
	Exclude all Underlying Auto Exposures ?	• ★ ○ Yes (No				
Policy Info	Underlying Policies	Create Policy 🔻	Remove Polic	Retrieve.	Account Policies Ref	trieve Additi	onal Policies
O Underlying Policies	Policy Type 🗘 Pro	Personal Auto	xternal Policy 🌲	Carrier Name	🗘 Policy Number 🇘	Status \$	Effective Dat
Household Members	Personal Auto	Property	No	Nationwide	9113J 900006	Active	02/09/2022
Vehicle Exposures	Property Ho	Watercraft	No	Nationwide	9113HR900005	Active	02/09/2022
Location Exposures	Underlying Policy Detail	Misc Vehicle	MiscVehicle				
Coverages	Policy Type	Personal A	uto		Limits currently on this	policy	
Underwriting	External Policy	No			Bodily Injury greater tha	n or * 🦲	Yes 🔿 No
Policy Review	Carrier Name	* Nationwid	e	•	Property Damage greate	suu: r * (Yes 🔿 No
	Policy Number	* 9113J 900	0006		than or equal to100,000?		
Quote	Effective Date	* 02/09/202	2	1	Uninsured/Underinsurer Motorist - BI greater than	∃ ×.● nor	Yes 🔿 No
Forms	Expiration Date	* 08/09/2022		5	equal to 250/500 or 300/300?		

Screen

Step 6

Action

On the Underlying Policy Details tab:

• Complete the required fields.

Note: It is recommended you input the number of boats and/or personal watercraft covered by the policy.

• Click the Watercraft Exposures link.

Note: Depending on the type of underlier being added, you need to select and complete the appropriate exposures screen; in this example, watercraft is being added.



Screen

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Step 7	
Action	Screen
 On the Watercraft Exposures screen: Complete the necessary underwriting questions. Note: In this example, the Underlying Policy field defaults from information added to the policy on the Underlying Policies screen. If no information displays on this screen, you can manually add a watercraft or boat using the Create Watercraft function. On the Watercraft Details tab: Complete the required fields. Click the Coverages link. 	I Desktop Account Delky Search Isam Administration Testing Itel 00.002222 Venues Sait Account + 43404443348 Policy Policy Change 16461123 Policy Change 16461123 Policy Change 16461123 Watercraft Exposures Testing
Step 8	
Action	Screen
 The Validation Results section displays, informing the user Watercraft Liability coverage has been added. Click the Clear button. 	Desktop • Account • Policy • Search • Team Administration • Testing • : © © Actions • Policy Change (Pending) • Personal Umbrelia Indiana Eff. 02/09/2022 Veruce Satt Account # 4340449388 Policy COVE/Tages • Back • Next> Quote • Withdraw Transaction • Yew Bill Calculator Policy Change 16861123 Policy Info Verwashad Members Verbicked Exposures Underlying Polices Interverting Policy Review Policy

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Job Aid Process (Cont.) :

Step 11

Action	Screen
 On the <i>Quote</i> screen: Click the Issue Change button. Click the OK button on the confirmation pop-up window. 	Desktop • Account • Policy • Search • Team Administration • Testing • : © © Actions Policy Change (Quoted) Policy Change (Quoted) Policy Change 16861123 Quoted Policy Contract Policy Contract Policy Contract Policy Contract Policy Info Policy Contract Policy Info Policy Address County Policy Policies Contry Policy Contract Policy Info Underlying Policies County Cost Change Details Policy Review Watercraft Exposures Coverage Policy Review Policy Review
Step 12	
Action	Screen
The <i>Policy Change Bound</i> screen displays confirming the binding of the policy change. The system automatically updates the associated Umbrella policy with the change(s).	Desktop Account Policy Search Ieam Administration Testing Testing Testing Policy change (Bound) Personal Umbrella Indiana Eff. 02/09/2022 Veruca Sait Account # 4340449388 Policy Policy Change Policy Change Verw your policy (#9113PU900002) Documents Review Changes Go to your desktop Trailing Documents

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