View an Umbrella Policy PolicyCenter



This job aid describes how to view an umbrella policy.

To view the policy details, you must search for the policy, either in PolicyCenter or another system. Once you locate the policy, you can click on the policy link to open the policy. The policy opens at the *Summary* screen.

Step 1		
Action	Screen	
 On the left side of the PolicyCenter screens, the various policy screen links are listed for your ease of navigation. You may click on a screen link, at any time, to jump to that section of the policy. In this job aid, we will step through the umbrella policy screens in order. Click the Policy Info link. 	Desktop Account * Balky * Search * Jean Teating * Tailing * * * * * * * * * * * * * * * * * * *	
Step 2		
Action	Screen	
 Policy details including term information, documentation preferences, and Producer of Record are displaced on the <i>Policy Info</i> screen. Click the Underlying Policies link. 	Desktop Account Policy Policy	



Job Aid Process (Cont.) :

Step 3

Action	Screen		
Liability coverage information and details about the underlying policies are listed on	Desigtop Account Policy Search Team Testing Training Training		
the Underlying Policies screen.			
Selecting each line will allow you to view detailed information about the policy.	Household Members Household Members Policy Type © Product Description © External Policy © Carrier Name © Policy Number © Status © Effective I Vehicle Exposures Fersonal Axto No Nationwide 91133-600274 Active 11/30/082 Active 08/23/302		
Click the Household Members link.	Coverages Quote Points Policy Type Personal Auto Limits currently on this policy		
	Date T11/30/2021 Deternal Policy Nos Baddly injury greater than or equal to 255/50 or 373,0073 Yes Image: Toole Policy Number Nationwide Property Durage partier than or purple appraiser Yes Summary Effective Date 113/30/2021 Uninsured Indefinitioned Missioned Indefinitioned Yes		
	Contacts Expiration Date 65/30/2022 equal to 259,500 or 300/300?		

Step 4

Action

The *Household Members* screen lists detailed information about all covered individuals.

• Click the Vehicle Exposures link.



Step 5

Action

Screen

The *Vehicle Exposures* screen lists detailed information on all covered vehicles and utility trailers.

• Click the Location Exposures link.

Note: If the Umbrella policy contains any watercrafts, an additional tab – Watercraft Exposures -- will be available in the *Left Navigation Bar* on the left.





Job Aid Process (Cont.) :

Step 6

Action	Screen
 The <i>Location Exposures</i> screen includes all location and dwelling information. Click the Dwelling Details tab. 	Desktop Account Policy Poli
Step 7	
Action	Screen
The Dwelling Details tab displays the qualification questions and responses.	Desktop ▼ Account ▼ Policy ▼ Search ▼ Ieam Testing ▼ Training ▼ :

Step 8

Action Screen The Coverages screen is where the : 🖉 🕲 Go ta <u>Ú</u> Des<u>k</u>top 💌 A<u>c</u>count 💌 <u>Policy</u> 💌 Searc<u>h</u> 💌 <u>T</u>eam Testing 💌 Training 💌 Primary Coverage and Underlying 🚞 Policy File 🥂 Personal Umbrella Indiana Nicholas Marsh Account: 2058995502 Policy: 91131U602010 In Force (Coverage details are listed. Coverages Policy Contract Policy Info Coverages • Click the **Quote** link. • Underlying Policies Primary Coverage Household Members Vehicle Exposures Umbrella Liability Limit • Quote Underlying Coverages Date 🗊 11/30/2021 Automobile Liability 🌼 Tools



Job Aid Process (Cont.) :

Step 9

Screen			
11 Desktop • Agcount • Policy • Search • Ieam Testing • Training • : 🖉 🞯 Go to			
Actions 😑 🔤 Policy File 💦 Personal Umbrella Indiana Nicholas Marsh Account: 2058995502 Policy: 911310602010 In Force (
PolicyContract ∧ Quote			
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ess 1900 E 10TH ST BLOOMINGTON, IN 47406-7512			
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