

# View an Umbrella Policy

## PolicyCenter



### Description:

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

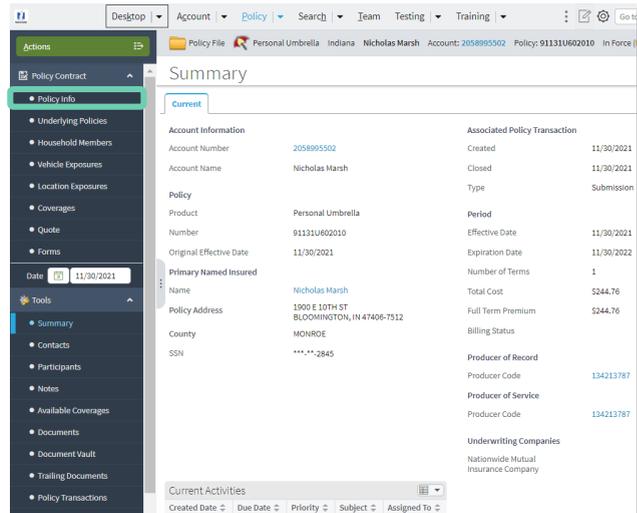
On the left side of the PolicyCenter screens, the various policy screen links are listed for your ease of navigation.

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.

#### Screen



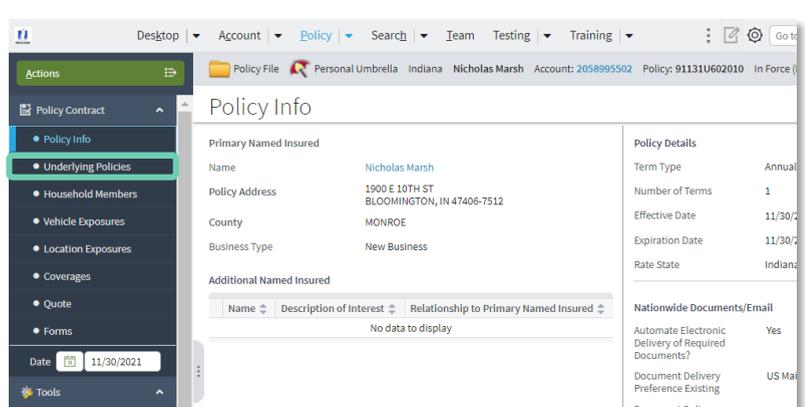
### Step 2

#### Action

Policy details including term information, documentation preferences, and Producer of Record are displaced on the *Policy Info* screen.

- Click the **Underlying Policies** link.

#### Screen



## Job Aid Process (Cont.) :

### Step 3

Action	Screen
<p>Liability coverage information and details about the underlying policies are listed on the <i>Underlying Policies</i> screen.</p> <p>Selecting each line will allow you to view detailed information about the policy.</p> <ul style="list-style-type: none"> <li>Click the <b>Household Members</b> link.</li> </ul>	

### Step 4

Action	Screen
<p>The <i>Household Members</i> screen lists detailed information about all covered individuals.</p> <ul style="list-style-type: none"> <li>Click the <b>Vehicle Exposures</b> link.</li> </ul>	

### Step 5

Action	Screen
<p>The <i>Vehicle Exposures</i> screen lists detailed information on all covered vehicles and utility trailers.</p> <ul style="list-style-type: none"> <li>Click the <b>Location Exposures</b> link.</li> </ul> <p><b>Note:</b> If the Umbrella policy contains any watercrafts, an additional tab – <i>Watercraft Exposures</i> -- will be available in the <i>Left Navigation Bar</i> on the left.</p>	

## Job Aid Process (Cont.) :

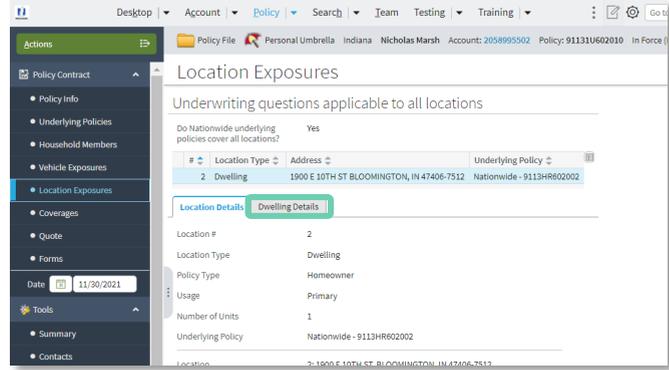
### Step 6

#### Action

The *Location Exposures* screen includes all location and dwelling information.

- Click the **Dwelling Details** tab.

#### Screen



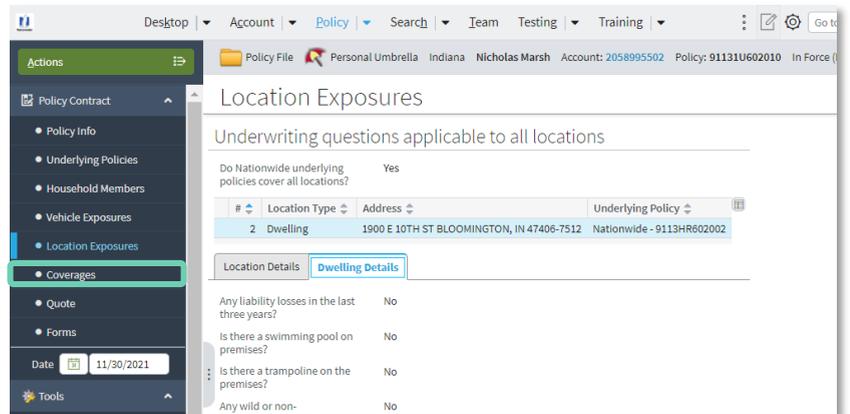
### Step 7

#### Action

The **Dwelling Details** tab displays the qualification questions and responses.

- Click the **Coverages** link.

#### Screen



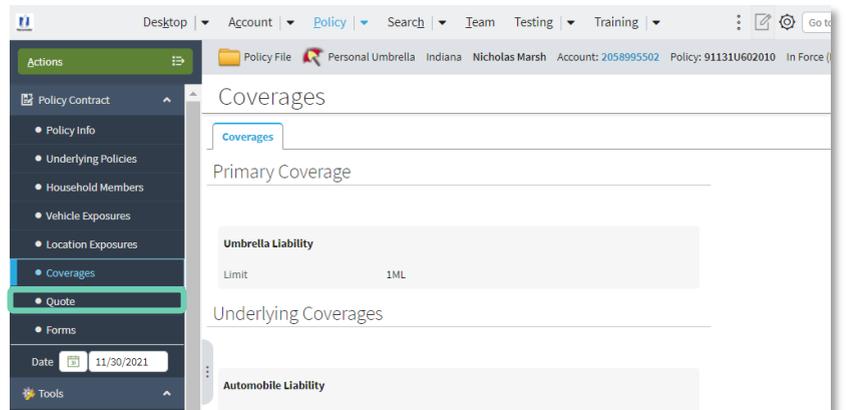
### Step 8

#### Action

The *Coverages* screen is where the Primary Coverage and Underlying Coverage details are listed.

- Click the **Quote** link.

#### Screen



## Job Aid Process (Cont.) :

### Step 9

Action	Screen
<p>The <i>Quote</i> screen provides pertinent coverage and policy information on one screen.</p> <p>You have viewed an Umbrella Policy.</p>	

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