

Add or Delete Secondary Insured – Auto/Property PolicyCenter



Description

This job aid reviews how to add and delete a secondary named insured to an Auto policy. The process is also the same to add or delete a secondary named insured to a Property policy.

In PolicyCenter, the most common Secondary Named Insured is the spouse of the Primary Named Insured (PNI). If the PNI is married, the spouse will have to be listed on the Property policy as a Secondary Named Insured. On an Auto policy, to have the Primary Named Insured and their spouse printed on ID Cards, the spouse needs to be listed as the Secondary Named Insured.

Select the link to advance to the desired procedure:

- [Add a Secondary Named Insured](#)
- [Delete a Secondary Named Insured](#)

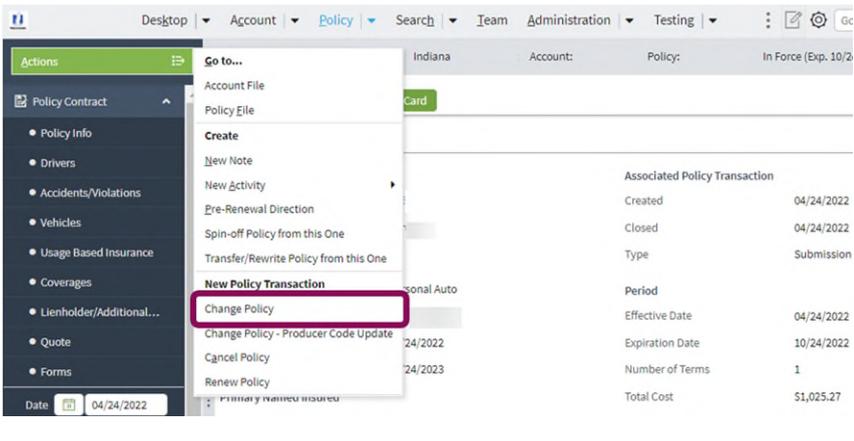
NOTE: If you are deleting a Secondary Named Insured due to Divorce/Separation or Deceased Named Insured, see [Life Events Job Aid](#).

By accepting a copy of these materials:

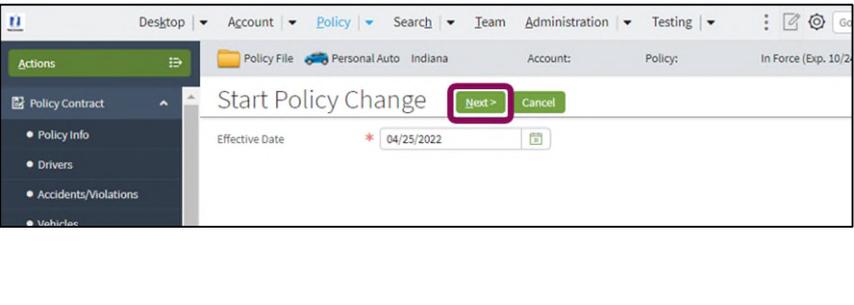
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Add a Secondary Named Insured

Step 1

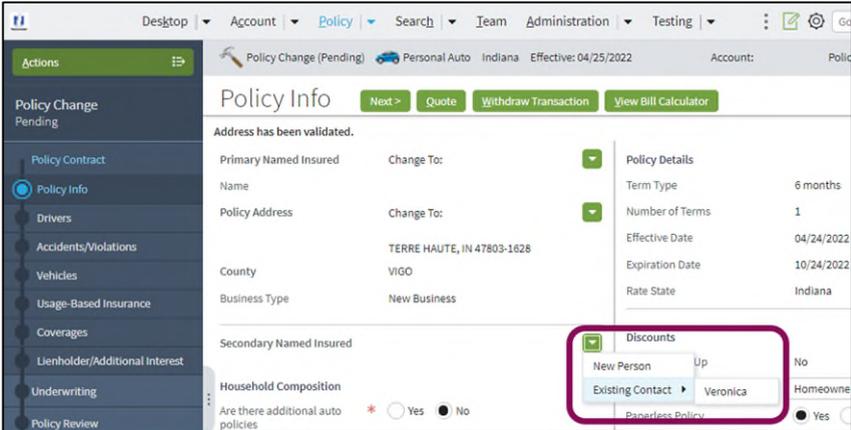
Action	Screen
<p>Open an existing Auto policy.</p> <ul style="list-style-type: none"> • Select the Actions button. • Select Change Policy from the drop-down menu. 	

Step 2

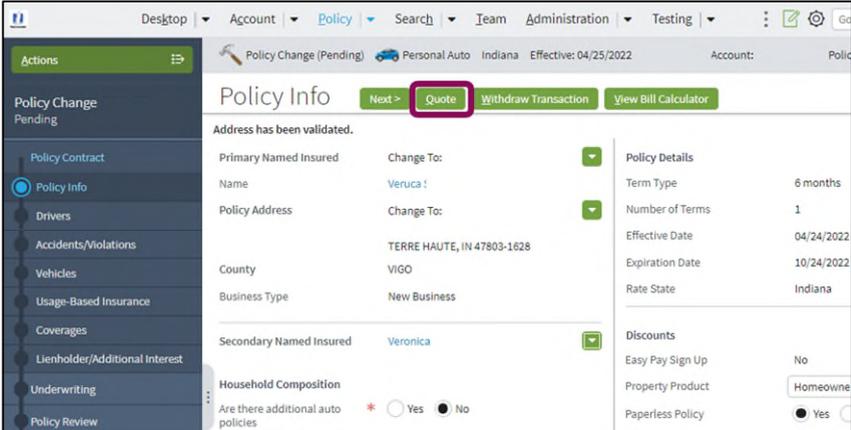
Action	Screen
<p>On the <i>Start Policy Change</i> screen, the Effective Date field defaults to the current date.</p> <ul style="list-style-type: none"> • If the needed start date is different than the default, enter the necessary information in the Effective Date field. • Select the Next > button. 	

Add a Secondary Named Insured, continued

Step 3

Action	Screen
<p>On the <i>Policy Info</i> screen:</p> <ul style="list-style-type: none"> • Select the down arrow to the right of the Secondary Named Insured field. • Select “New Person”, if the contact does not exist. • Select “Existing Contact”, if the contact exists, and then the desired individual displayed to the right of Existing Contact. 	 <p>The screenshot shows the 'Policy Info' screen with a dropdown menu open for the 'Secondary Named Insured' field. The menu options are 'New Person' and 'Existing Contact'. The 'Existing Contact' option is selected, and a list of contacts is shown, with 'Veronica' highlighted. A red box highlights the dropdown menu and the 'Veronica' contact.</p>

Step 4

Action	Screen
<p>The secondary named insured is added.</p> <ul style="list-style-type: none"> • Select the Quote button. 	 <p>The screenshot shows the 'Policy Info' screen with the 'Quote' button highlighted in a red box. The 'Secondary Named Insured' field now displays 'Veronica'.</p>

Add a Secondary Named Insured, continued

Step 5

Action	Screen
<p>On the <i>Quote</i> screen:</p> <ul style="list-style-type: none"> • Select the Issue Change button. • On the pop-up confirmation window, select the OK button. 	

Step 6

Action	Screen
<p>You have successfully added a Secondary Named Insured to an Auto Policy.</p>	

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Delete a Secondary Named Insured

Step 1

Action	Screen
<p>Open an existing Auto policy.</p> <ul style="list-style-type: none"> • Select the Actions button. • Select “Change Policy” from the drop-down menu. 	

Step 2

Action	Screen
<p>On the <i>Start Policy Change</i> screen the Effective Date field defaults to the current date.</p> <ul style="list-style-type: none"> • If the needed start date is different than the default, enter the necessary information in the Effective Date field. • Select the Next > button. 	

Delete a Secondary Named Insured, continued

Step 3

Action	Screen
<p>On the <i>Policy Info</i> screen:</p> <ul style="list-style-type: none"> • Select the down arrow to the right of the Secondary Named Insured name listed on the policy. • Select “Remove” from the drop-down list. 	<p>The screenshot shows the 'Policy Info' screen with a dropdown menu open for the 'Secondary Named Insured' field. The 'Remove' option is highlighted with a red box. Other options include 'New Person', 'Existing Contract', and 'Up'.</p>

Step 4

Action	Screen
<p>The secondary named insured is removed.</p> <ul style="list-style-type: none"> • Quote and Issue the pending Policy Change. 	<p>The screenshot shows the 'Policy Info' screen after the secondary named insured has been removed. The 'Secondary Named Insured' field is now empty, and the dropdown menu is closed.</p>

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