

Add, Replace, or Remove a Vehicle to an Existing Pleasure Boatowners PS Policy

PolicyCenter

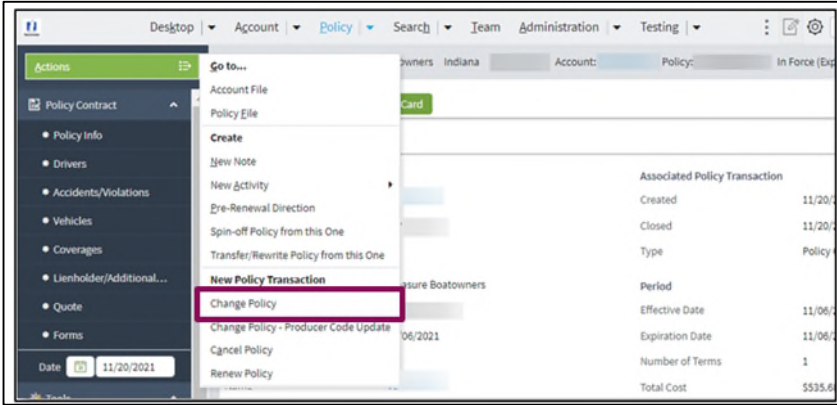


Description

This job aid reviews how to add, replace, or remove a vehicle on an existing Powersports Pleasure Boatowners policy.

Start a Policy Change

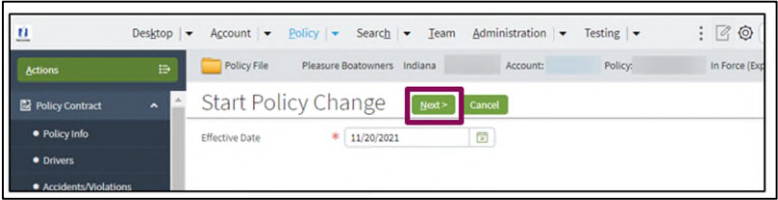
Step 1

Action	Screen
<p>Open an existing Powersports Pleasure Boatowners policy:</p> <ul style="list-style-type: none"> Select the "Actions button". Select "Change Policy" from the drop-down menu. 	 <p>The screenshot shows the PolicyCenter web application. On the left, there is a sidebar with a list of actions: Policy Contract, Policy Info, Drivers, Accidents/Violations, Vehicles, Coverages, Lienholder/Additional..., Quote, and Forms. The 'Actions' button is highlighted. A dropdown menu is open, showing options like 'Go to...', 'Account File', 'Policy File', 'Create', 'New Note', 'New Activity', 'Pre-Renewal Direction', 'Spin-off Policy from this One', 'Transfer/Rewrite Policy from this One', 'New Policy Transaction', 'Change Policy', 'Change Policy - Producer Code Update', 'Cancel Policy', and 'Renew Policy'. The 'Change Policy' option is highlighted with a red box. The main area of the screen shows a table with columns for 'Associated Policy Transaction', 'Created', 'Closed', 'Type', 'Period', 'Effective Date', 'Expiration Date', 'Number of Terms', and 'Total Cost'.</p>

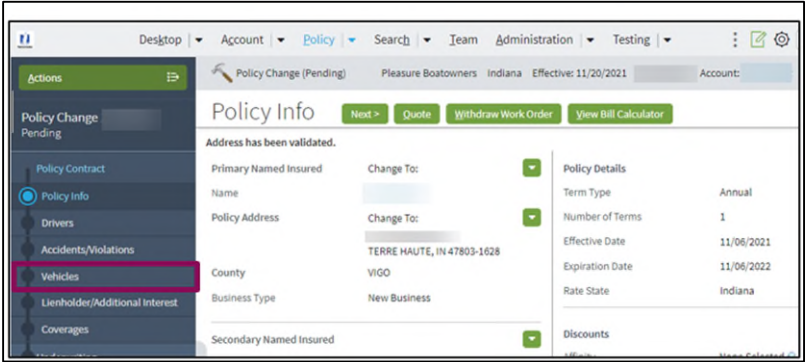
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Step 2

Action	Screen
<p>On the “Start Policy Change” screen, the “Effective Date” field defaults to the current date:</p> <ul style="list-style-type: none">• Enter the appropriate information in the “Effective Date” field.• Select the “Next >” button.	

Step 3

Action	Screen
<p>On the “Policy Info” screen:</p> <ul style="list-style-type: none">• Select the “Vehicles” link.	

Next Steps : Add a Vehicle, Replace a Vehicle or Remove a Vehicle

Select the appropriate link below to jump to the next relevant process steps:

- [Add a Vehicle](#)
- [Replace a Vehicle](#)
- [Remove a Vehicle](#)

Add a Vehicle

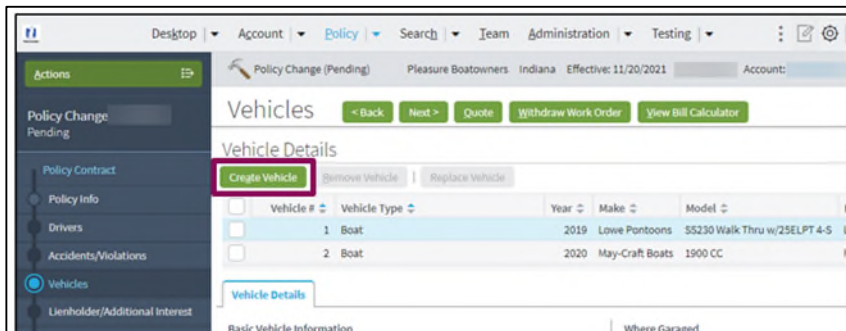
Step 4

Action

On the “Vehicles” screen:

- Select the “Create Vehicle” button.

Screen



Step 5

Action

In the “Basic Vehicle Information” section:

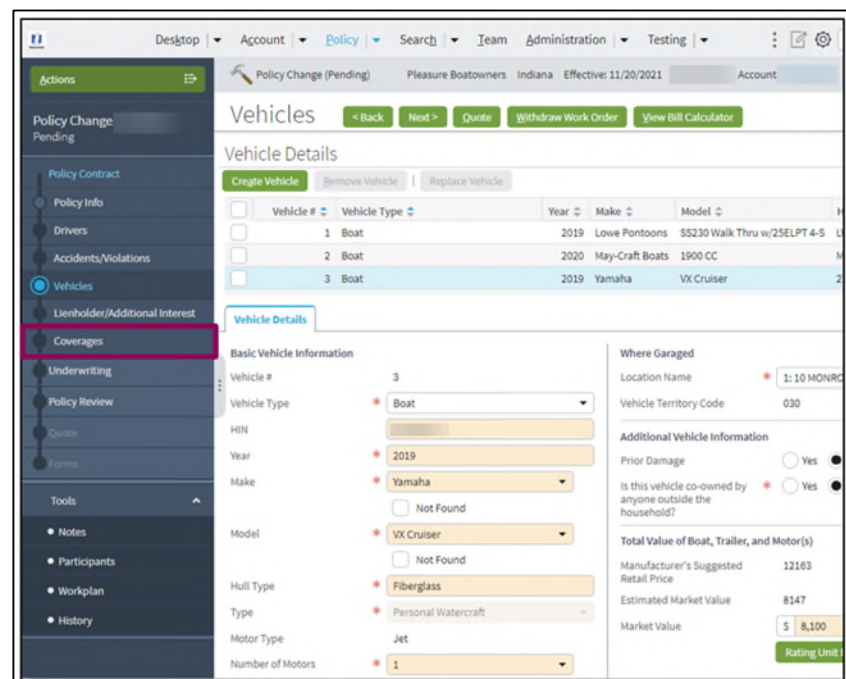
- Complete all required fields. You may need to scroll to view/complete all fields.



- VIN look-up services are not available for Powersports Pleasure Boatowners policies. You must manually complete all fields.
- In some cases, an additional screen may display for the entered VIN, requiring you to select a more specific make/model combination via a radio button.
- Motor information is not required for a personal watercraft. For any other type of pleasure boat, you must select the “Outboard Motor Information Motor #” link in the right column and complete all required fields on the “Motor Details” screen.

- Select the “Coverages” link.

Screen



Add a Vehicle, continued

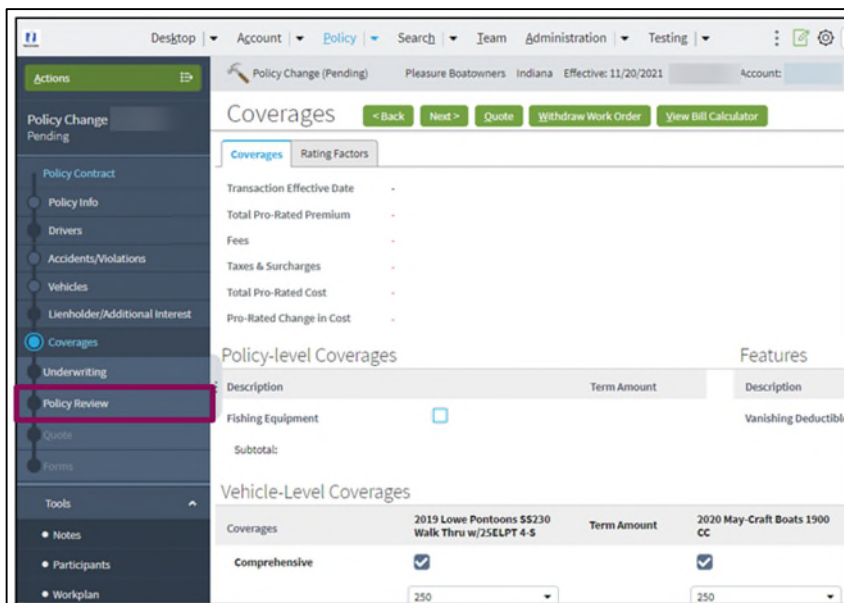
Step 6

Action

On the “Coverages” screen:

- Verify all coverages for the added vehicle.
- Select the “Policy Review” link.

Screen



Policy-Level Coverages	Term Amount	Description
Fishing Equipment		Vanishing Deductible
Subtotal:		

Vehicle-Level Coverages	Term Amount	Description
2019 Lowe Pontoon 55230 Walk Thru w/25ELPT 4-S		2020 May-Craft Boats 1900 CC
Comprehensive	250	250

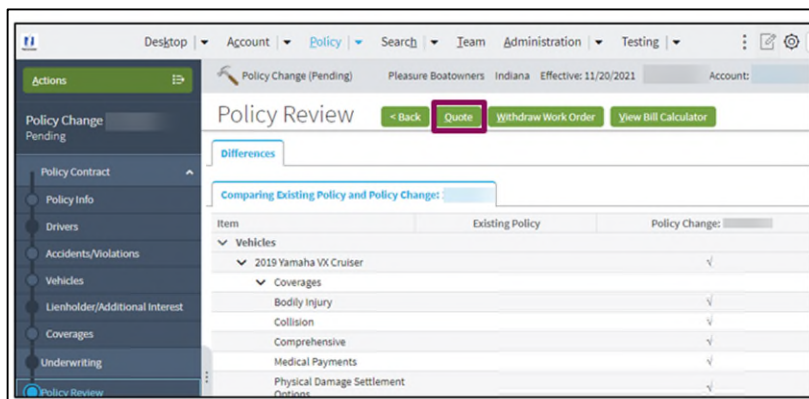
Step 7

Action

In the “Policy Review” section:

- Review the coverage changes for the revised policy.
- Select the “Quote” button.

Screen

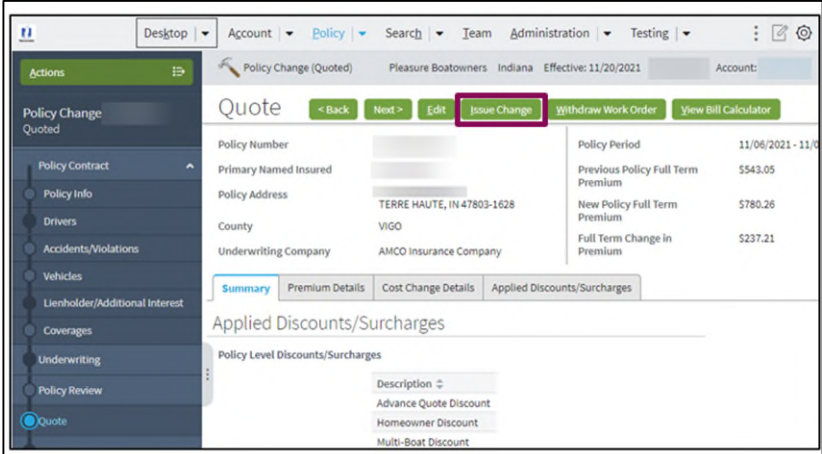


Item	Existing Policy	Policy Change
2019 Yamaha VX Cruiser		✓
Coversages		
Bodily Injury		✓
Collision		✓
Comprehensive		✓
Medical Payments		✓
Physical Damage Settlement		✓

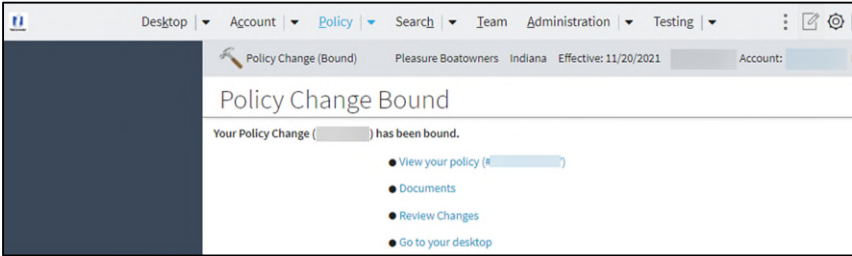


Add a Vehicle, continued

Step 8

Action	Screen
<p>On the “Quote” screen:</p> <ul style="list-style-type: none">Select the “Issue Change” button.Select the “OK” button on the “Issue Change” pop-up window after reviewing the disclosure statement.	

Step 9

Action	Screen
<p>The “Policy Change Bound” screen displays. This indicates the change is bound.</p>	

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Replace a Vehicle

Step 4

Action

On the “Vehicles” screen:

- Select the checkbox to the left of the “Vehicle #” which needs to be replaced.
- Select the “Replace Vehicle” button.

Screen

Vehicle #	Vehicle Type	Year	Make	Model
<input checked="" type="checkbox"/> 1	Boat	2019	Lowie Pontoons	SS230 Walk Thru w/25ELPT 4-5
<input type="checkbox"/> 2	Boat	2020	May-Craft Boats	1900 CC
<input type="checkbox"/> 3	Boat	2019	Yamaha	VX Cruiser

Step 5

Action

In the “Basic Vehicle” Information section:

- Complete all required fields. You may need to scroll to view/complete all fields.



- VIN look-up services are not available for Powersports Pleasure Boatowners policies. You must manually complete all fields.
- In some cases, an additional screen may display for the entered VIN, requiring you to select a more specific make/model combination via a radio button.

- Select the “Edit” button in the “Outboard Motor Information” section.

Screen

Vehicle #	Vehicle Type	Year	Make	Model	HIN/Serial Number
<input type="checkbox"/> 1	Boat				
<input type="checkbox"/> 2	Boat	2020	May-Craft Boats	1900 CC	
<input type="checkbox"/> 3	Boat	2019	Yamaha	VX Cruiser	

Replace a Vehicle, continued

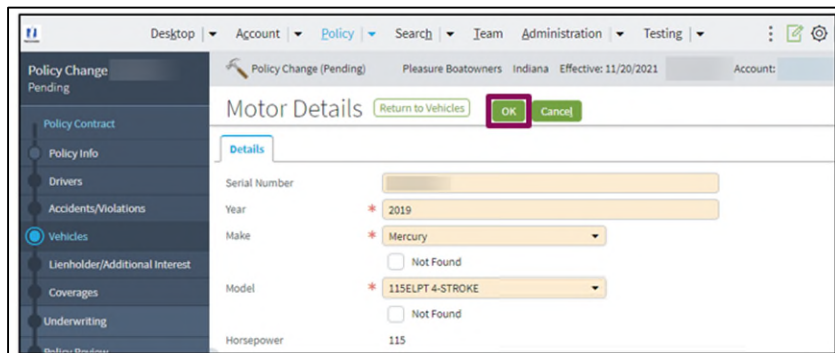
Step 6

Action

On the “Motor Details” screen:

- Complete all required fields.
- Select the “OK” button.

Screen



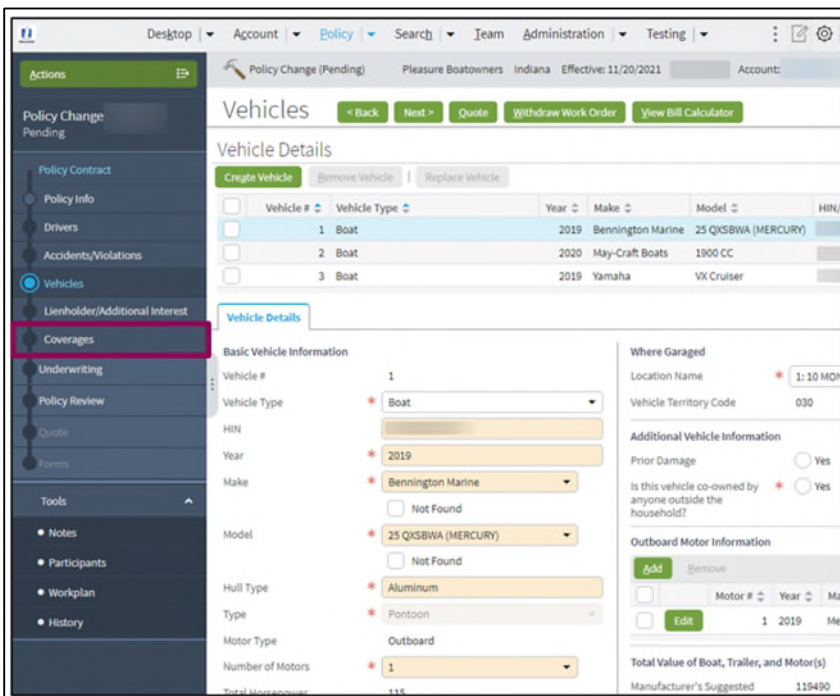
Step 7

Action

On the “Vehicles” screen:

- Select the “Coverages” link.

Screen



Replace a Vehicle, continued

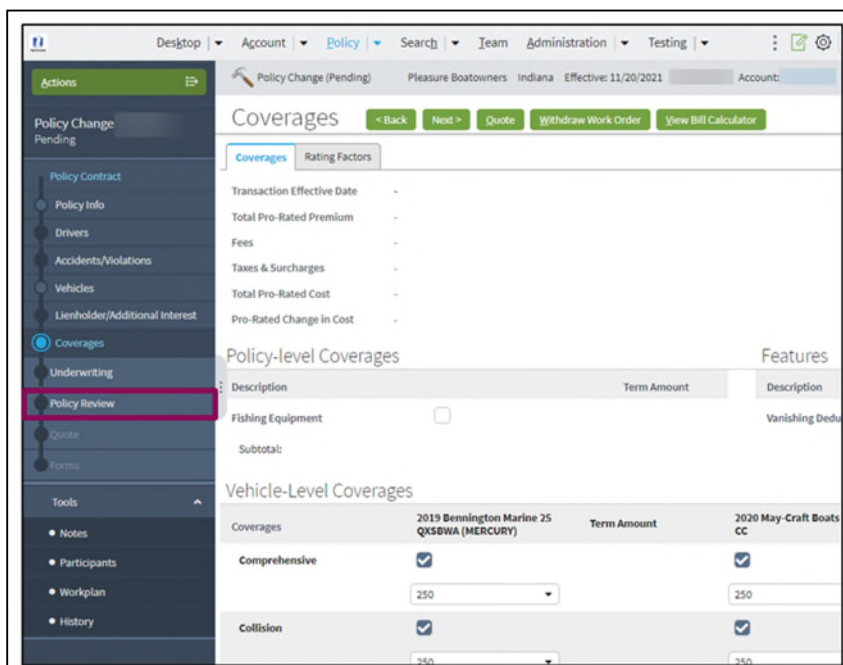
Step 8

Action

On the "Coverages" screen:

- Verify all coverages for the added vehicle.
- Select the "Policy Review" link.

Screen



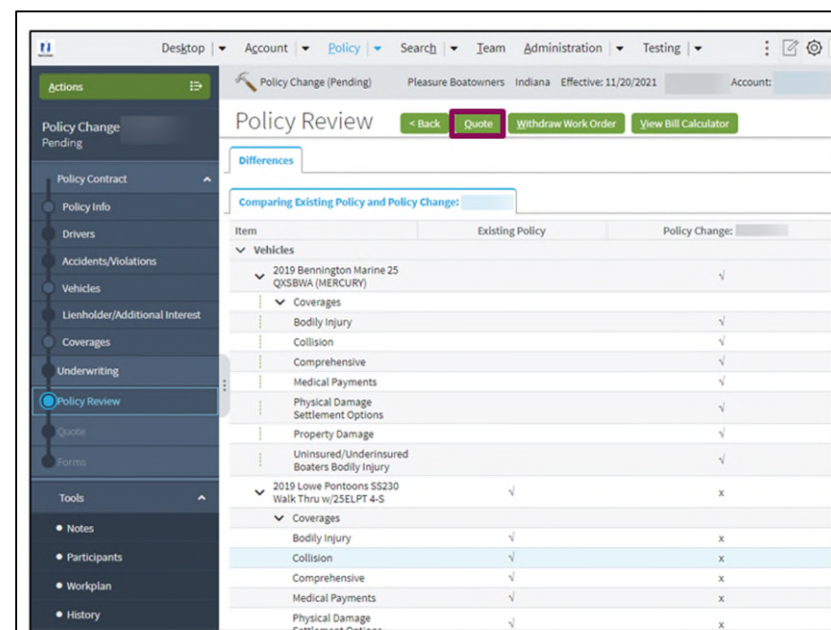
Step 9

Action

In the Policy Review section:

- Review the coverage changes for the revised policy.
- Select the Quote button.

Screen



Replace a Vehicle, continued

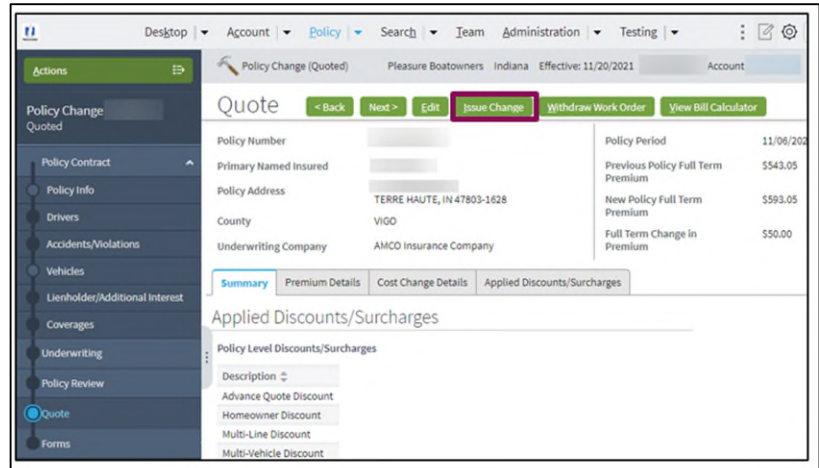
Step 10

Action

On the "Quote" screen:

- Select the "Issue Change" button.
- Select the "OK" button on the "Issue Change" pop-up window after reviewing the disclosure statement.

Screen

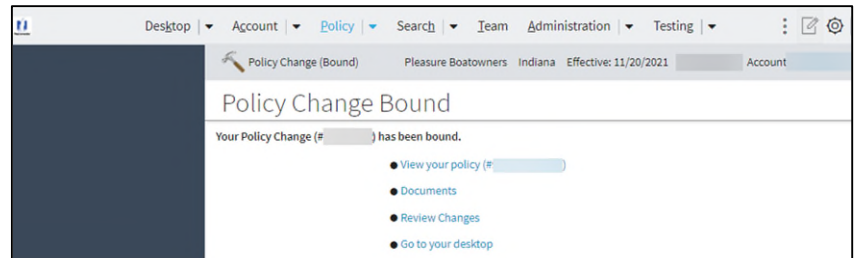


Step 11

Action

The "Policy Change Bound" screen displays. This indicates the change is bound.

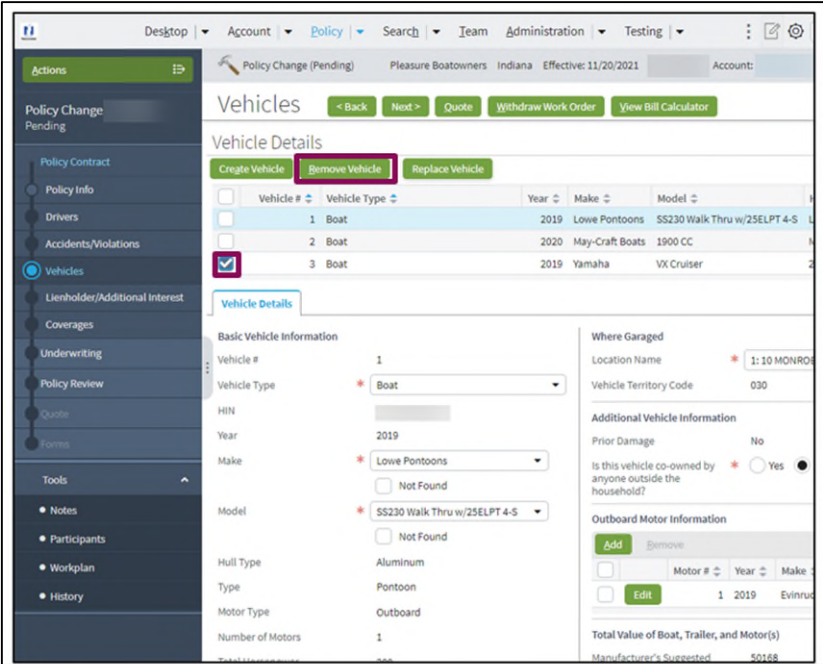
Screen



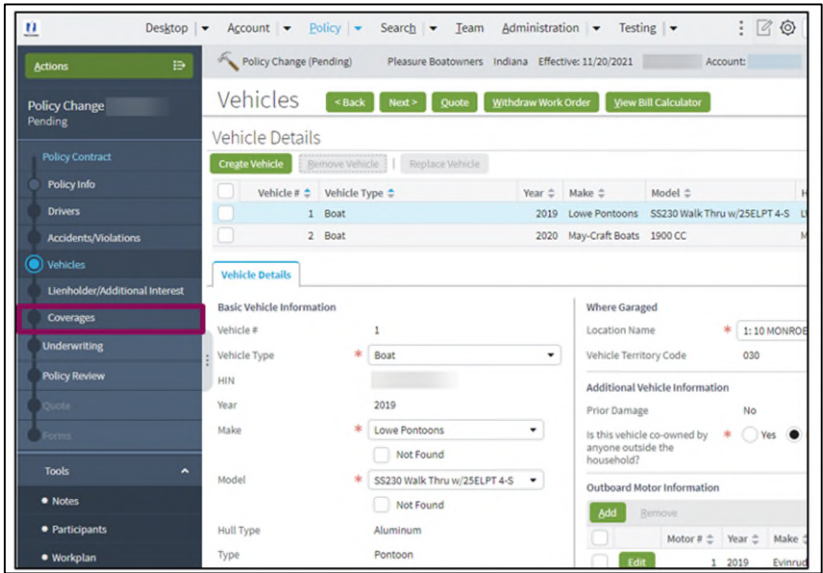
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Remove a Vehicle

Step 4

Action	Screen
<p>On the “Vehicles” screen:</p> <ul style="list-style-type: none">Select the checkbox to the left of the “Vehicle #” to be removed.Select the “Remove Vehicle” button.	

Step 5

Action	Screen
<p>After removing the vehicle:</p> <ul style="list-style-type: none">Select the “Coverages” link to ensure the coverages have also been removed.	

Remove a Vehicle, continued

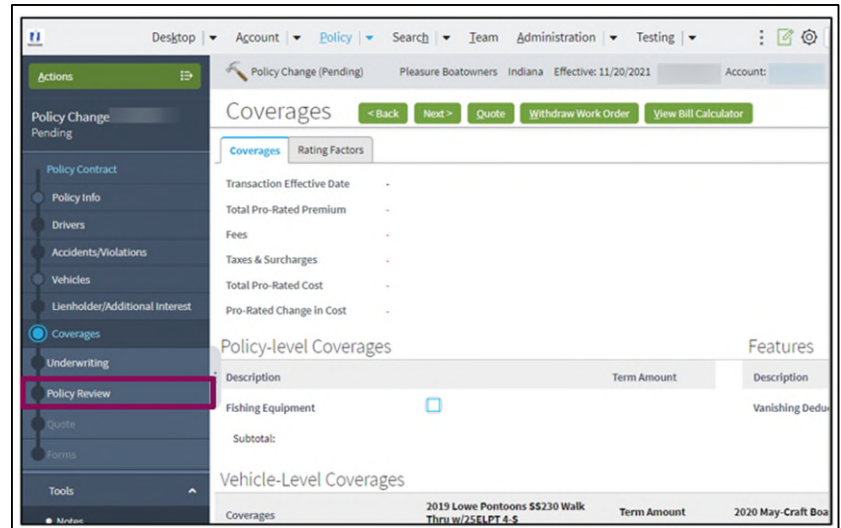
Step 6

Action

On the "Coverages" screen:

- Verify all coverages for the vehicle have been removed.
- Select the "Policy Review" link.

Screen



The screenshot shows the 'Coverages' screen in the PolicyCenter system. The left sidebar contains a list of links, with 'Policy Review' highlighted in red. The main content area displays the 'Coverages' section, which includes a table of coverages and a 'Policy-level Coverages' section. The table of coverages lists various coverages such as Transaction Effective Date, Total Pro-Rated Premium, Fees, Taxes & Surcharges, Total Pro-Rated Cost, and Pro-Rated Change in Cost. The 'Policy-level Coverages' section includes a table with columns for Description, Term Amount, and Features. The 'Vehicle-Level Coverages' section includes a table with columns for Coverages, Term Amount, and Features.

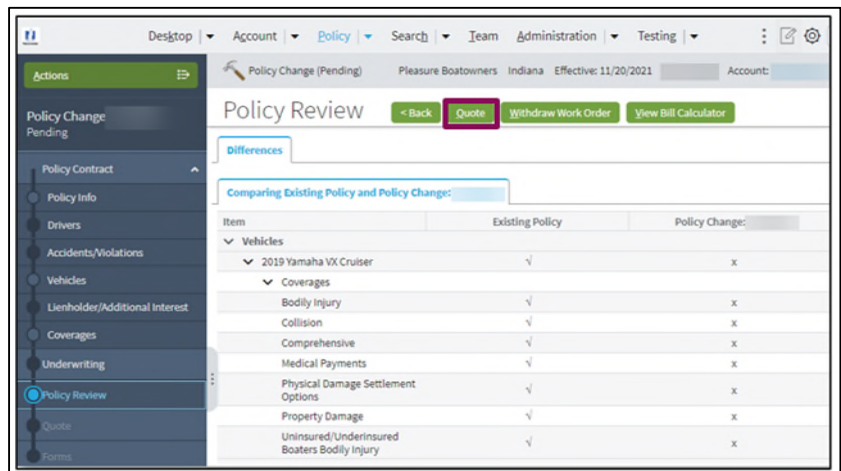
Step 7

Action

In the "Policy Review" section:

- Review the coverage changes for the revised policy.
- Select the "Quote" button.

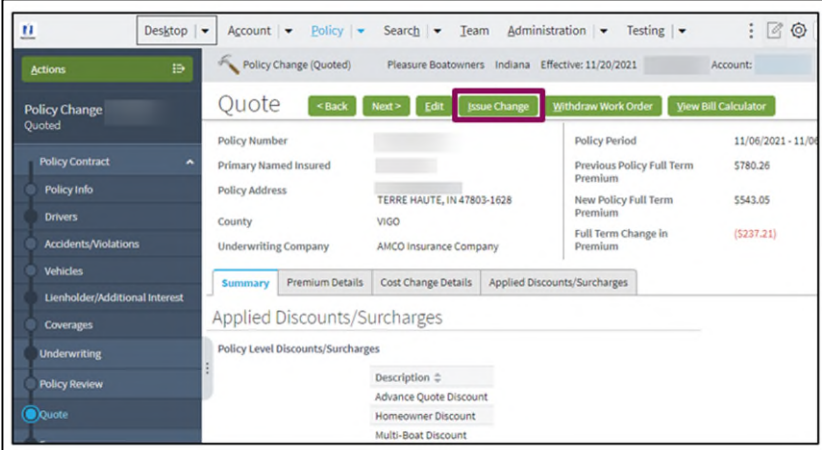
Screen



The screenshot shows the 'Policy Review' screen in the PolicyCenter system. The left sidebar contains a list of links, with 'Policy Review' highlighted in red. The main content area displays the 'Policy Review' section, which includes a table of differences between the existing policy and the policy change. The table has columns for Item, Existing Policy, and Policy Change. The 'Item' column lists various coverages such as Bodily Injury, Collision, Comprehensive, Medical Payments, Physical Damage Settlement Options, Property Damage, and Uninsured/Underinsured Boaters Bodily Injury. The 'Existing Policy' column shows '√' for all items, and the 'Policy Change' column shows 'X' for all items.

Remove a Vehicle, continued

Step 8

Action	Screen
<p>On the "Quote" screen:</p> <ul style="list-style-type: none">• Select the "Issue Change" button.• Select the "OK" button on the "Issue Change" pop-up window after reviewing the disclosure statement.	

Step 9

Action	Screen
<p>The "Policy Change Bound" screen displays. This indicates the change is bound.</p>	