# 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**



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Step 2	
Action	Screen
On the "Start Policy Change" screen, the "Effective Date" field defaults to the current date: • Enter the appropriate information in	Desktop        Account        Policy        Search        Ieam Administration        Testing        Testin
the "Effective Date" field.	Accidents/Violations
<ul> <li>Select the "Next &gt;" button.</li> </ul>	
Step 3	
Action	Screen
On the "Policy Info" screen:	
• Select the "Vehicles" link.	Image: Design (Contract)       Account (Contract)       Policy Change (Pending)       Pleasure Boatowners indiana Effective: 11/20/2021       Account:         Policy Change       Policy Change (Pending)       Pleasure Boatowners indiana Effective: 11/20/2021       Account:         Policy Change       Policy Change (Pending)       Pleasure Boatowners indiana Effective: 11/20/2021       Account:         Policy Change       Policy Contract       Primary Named Insured       Change To:       Policy Details         Policy Contract       Primary Named Insured       Change To:       Policy Details       Term Type         Policy Address       Change To:       Policy Details       Term Type       Annual         Name       Policy Address       Change To:       Policy Details       Term Type         Accidents/Wolations       County       ViGO       Business Type       New Business       Expiration Date       11/06/2022         Rate State       Indiana       Secondary Named Insured       Counts       Stoomts       Micro Mode
Nové Store - Add - Vakiele Devles	o o Vahiolo or Domovo o Vahiolo

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

- Add a Vehicle
- <u>Replace a Vehicle</u>
- Remove a Vehicle



#### Add a Vehicle

### Step 4

Action	Screen		
n the "Vehicles" screen:	11 Desktop   ▼ Agcount   ▼ Policy   ▼ Search   ▼ Ieam Administration   ▼ Testing   ▼		
<ul> <li>Select the "Create Vehicle" button.</li> </ul>	Actions 😰 Relicy Change (Pending) Pleasure Boatowners Indiana Effective: 11/20/2021 Account:		
	Policy Change Vehicles <back next=""> Quote Withdraw Work Order View Bill Calculator</back>		
	Pending Vehicle Details		
	Policy Contract Create Vehicle Bernove Vehicle 1 Replace Vehicle		
	Policy Info     Vehicle #      Vehicle Type      Vehicle Type      Vehicle #      Model      Model		
	Drivers 1 Boat 2019 Lowe Pontoons \$5230 Walk Thru w/25ELPT 4-5		
	Accidents/Violations 2 Boat 2020 May-Craft Boats 1900 CC		
	Vehicle Details		
	Lienholder/Additional Interest Basic Vehicle Information Where Garaged		

#### 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.





## Add a Vehicle, continued

# Step 6

Action		S	creen		
<ul> <li>On the "Coverages" screen:</li> <li>Verify all coverages for the added vehicle.</li> <li>Select the "Policy Review" link.</li> </ul>		Account   Policy   S Policy Change (Pending) COVET ages Back Coverages Rating Factors ansaction Effective Date - stal Pro-Rated Premium - tes - tal Pro-Rated Cost - tro-Rated Change in Cost - colicy-level Coverages escription shing Equipment Subtotal:	iearch   ▼ Ieam Administ Pleasure Boatowners Indiana Ef 8 Next > Quote Withdr	ration    Testing fective: 11/20/2021 w Work Order Yerw Term Amount	Features Description Vanishing Deductible
	Tools A	ehicle-Level Coverage:	S 2019 Lowe Pontoons \$\$230 Walk Thru w/25ELPT 4-\$	Term Amount	2020 May-Craft Boats 1900 CC
	Participants     Workplan	Comprehensive	250 •		250 ¥

# Step 7

Action	Screen
In the "Policy Review" section:	U Desgtop   ▼ Account   ▼ Bolicy   ▼ Search   ▼ Ieam Administration   ▼ Testing   ▼ : 2 @
<ul> <li>Review the coverage changes for the revised policy.</li> </ul>	Actions  Policy Change [Pending] Pleasure Boatowners Indiana Effective: 11/20/2021 Account: Policy Change Pending Pilferences
<ul> <li>Select the "Quote" button.</li> </ul>	Policy Contract Policy Info Comparing Existing Policy and Policy Change:
	Drivers         Item         Existing Policy         Policy Change:           Accidents/Molations         ✓ Vehicles         ✓
	Vehicles Coverages
	Coverages Comprehensive v Underwriting Medical Psyments v
	Physical Damage Settlement



## Add a Vehicle, continued

## Step 8

Action	Screen
<ul> <li>On the "Quote" screen:</li> <li>Select the "Issue Change" button.</li> <li>Select the "OK" button on the "Issue Change" pop-up window after reviewing the disclosure statement.</li> </ul>	Image: Contract Policy Contract Policy Contract Policy Review       Policy Contract Policy Contract Premium Details Cost Change Details Applied Discounts/Surcharges       Policy Contract Summary Premium Details Cost Change Details Applied Discounts/Surcharges         Policy Review       Policy Level Discounts/Surcharges         Policy Review       Policy Review
Step 9	
Action	Screen
The "Policy Change Bound" screen displays. This indicates the change is bound.	Desktop   • Account   • Policy   • Search   • Ieam Administration   • Testing   • :        Image: Constraint of the second





#### **Replace a Vehicle**

#### Step 4

Action	Screen
<ul> <li>On the "Vehicles" screen:</li> <li>Select the checkbox to the left of the "Vehicle #" which needs to be replaced.</li> <li>Select the "Replace Vehicle" button.</li> </ul>	Image: Policy Contract       Policy Contract         Policy Contract       Vehicle Details         Policy Info       Vehicle III South Coder         Policy Contract       Vehicle III South Coder         Vehicle III South Coder       Vehicle IIII South Coder         Vehicle IIII South Coder       Vehicle IIII South Coder         Vehicle IIII South Coder       Vehicle IIII South Coder         Vehicle IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII
Step 5	
Action	Screen

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.





#### **Replace a Vehicle, continued**







#### **Replace a Vehicle, continued**

#### Step 8

Action		Screen	
n the "Coverages" screen:	Desktop   • Account   •	<u>Policy</u> ▼ Search ▼ Team Administration ▼ Testin	s   • 🛛 🗄 🖗
<ul> <li>Verify all coverages for the added vehicle.</li> </ul>	Actions Policy Change Policy Change Pending	ge (Pending) Pleasure Boatowners Indiana Effective: 11/20/2021	Account:
<ul> <li>Select the "Policy Review" link.</li> </ul>	Policy Contract Policy Contract Policy Info Drivers Accidents/Violations Vehicles Uenholder/Additional Interest Cocverages Underwriting Policy Review Policy Review Course Subtatic Vehicles Veh	the Date - Premium	Features nt Description Vanishing Ded
	Notes     Coverages	2019 Bennington Marine 25 QXSBWA (MERCURY) Term Amount	2020 May-Craft Boat CC
	Participants     Comprehensive     Workplan	e 🔽 250 🔹	250
	History     Collision	250	250

#### Step 9

#### Action Screen In the Policy Review section: : 20 <u>0</u> Des<u>k</u>top | • A<u>c</u>count | • <u>Policy</u> | • <u>Search</u> | • <u>Team</u> <u>A</u>dministration | • Testing | • • Review the coverage changes for the Rolicy Change (Pending) re Boatowners Indiana Effective: 11/20/2021 Pleas revised policy. Policy Review Policy Change Pending < Back Quote Withdraw Work Order View Bill C Differences Policy Contract Select the Quote button. Comparing Existing Policy and Policy Change: Policy Info Item Existing Policy Policy Change: ✓ Vehicles 2019 Bennington Marine 25 QXSBWA (MERCURY) ✓ Coverages nholder/Additi Bodily Injury Collision Coverages Comprehensive Medical Payments Physical Damage Settlement Options Property Damage Uninsured/Underinsured Boaters Bodily Injury 2019 Lowe Pontoons SS230 Walk Thru w/25ELPT 4-S Tools ✓ Coverages • N Bodily Injury Collision Participants Comprehensive Workplan Medical Payments History Physical Damage



#### **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.

Des <u>k</u>	top 🗧 Agcount	▼ Policy ▼	Search 🝷 Iea	m Administration -	Testing   🕶	20
Actions	Policy (	Change (Quoted)	Pleasure Boatowne	rs Indiana Effective: 11/2	20/2021 Account	
Policy Change	Quote	< Back	Next> Edit Iss	ue Change	lork Order View Bill Calcula	itor
Quoted	Policy Numb	er			Policy Period	11/06/20
Policy Contract	<ul> <li>Primary Nan</li> </ul>	ned Insured			Previous Policy Full Term	\$543.05
Policy Info	Policy Addre	55	TERRE HAUTE, IN 4780	3-1628	Premium New Policy Full Term	\$593.05
Drivers	County		VIGO		Premium	
Accidents/Violations	Underwritin	g Company	AMCO Insurance Comp	any	Full Term Change in Premium	\$50.00
Vehicles						
Lienholder/Additional Inter	est Summary	Premium Details	Cost Change Details	Applied Discounts/Surcha	inges	
Coverages	Applied	Discounts/S	urcharges			
Underwriting	Policy Level	Discounts/Surcharg	es			
Policy Review	Description	\$				
	Advance Qu	ote Discount				
Quote	Homeowne	r Discount				
Forms	Multi-Vehici	le Discount				

Screen

#### Step 11 Action Screen The "Policy Change Bound" screen ú : 20 Des<u>k</u>top | 🕶 Account 💌 Policy 💌 Search 💌 Team Administration 💌 Testing 🔍 displays. This indicates the change is Policy Change (Bound) Pleasure Boatowners Indiana Effective: 11/20/2021 Account bound. Policy Change Bound Your Policy Change (# ) has been bound. View your policy (# Documents Review Changes Go to your desktop





#### **Remove a Vehicle**

#### Step 4

Action	Screen
<ul> <li>On the "Vehicles" screen:</li> <li>Select the checkbox to the left of the "Vehicle #" to be removed.</li> <li>Select the "Remove Vehicle" button.</li> </ul>	Desktop       Account       Policy       Search       Ieam       Administration       Testing       Ieam         Actions       IP       Policy Change       Pelasure Boatowners       Indiana       Effective: 11/20/2021       Account:         Policy Change       Policy Change       Policy Change       VehicleS       Sask       Next>       Quoke       Wethdraw Work Order       Yew Bill Calculator         Policy Change       Policy Info       Vehicle Details       Create Vehicle       Replace Vehicle       Nodel ‡       Nodel ‡ <td< td=""></td<>
	Lienholder/Additional Interest       Vehicle Details         Coverages       Basic Vehicle Information         Underwriting       Vehicle Type         Policy Review       Vehicle Type         Vehice Type       Boat         Vehice Torpe       Now Found         Model       \$5230 Waik Thru w/25ELPT 4-5         Notor Sound       Motor Type         Vehice Type       Pontoon         Motor Type       Pontoon         Motor Type       Outboard
Step 5	Tabal to involution and an Annufacturer's Surgested S0168
Action	Screen

After removing the vehicle:

 Select the "Coverages" link to ensure the coverages have also been removed.





#### Remove a Vehicle, continued

#### Step 6

#### Action Screen On the "Coverages" screen: ú Desktop | -Account - Policy -Search - Ieam Administration - Testing -: 🖸 🎯 • Verify all coverages for the vehicle Pleasure Boatowners Indiana Effective: 11/20/2021 Policy Change (Pending) Account: have been removed. Coverages < Back Next > Quote Withdraw Work Order View Bill Calc Policy Chang Coverages Rating Factors • Select the "Policy Review" link. Transaction Effective Date Total Pro-Rated Premium Fees Taxes & Surcharges Total Pro-Rated Cost Pro-Rated Change in Cost Policy-level Coverages Features Description Description Vanishing De Fishing Equipment Subtotal: Vehicle-Level Coverages 2019 Lowe Pontoons \$\$230 Walk Thru w/25ELPT 4-\$ Term Amor 2020 May-Craft Be

#### Step 7

#### Action

In the "Policy Review" section:

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

	E Pallo Change (Deciding) Diase	a Destaurant Indiana (Merthus 11)	terent to the terest
Actions 🕀	Policy change (Pending) Pleasu	re boatowners indiana chective: 11/4	N/2021 Account
Policy Change	Policy Review	K Quote Withdraw Work Order	View Bill Calculator
Pending			
Policy Contract	Differences		
Policy Info	Comparing Existing Policy and Policy Cha	nge:	
Drivers	Item	Existing Policy	Policy Change:
Accidents Ministions	✓ Vehicles		
Accounts	<ul> <li>2019 Yamaha VX Cruiser</li> </ul>	4	x
Vehicles	<ul> <li>Coverages</li> </ul>		
Lienholder/Additional Interest	Bodily Injury	1	x
I.	Collision	V	x
Coverages	Comprehensive	1	x
Underwriting	Medical Payments	N	x
OPolicy Review	Physical Damage Settlement Options	*	x
Course .	Property Damage	~	x
- Quote	Uninsured/Underinsured Boaters Bodily Injury	4	х

Screen



## Remove a Vehicle, continued

## Step 8

Action	Screen
<ul> <li>On the "Quote" screen:</li> <li>Select the "Issue Change" button.</li> <li>Select the "OK" button on the "Issue Change" pop-up window after reviewing the disclosure statement.</li> </ul>	Image: Construct Construct       Policy Change Quoted       Pleasure Boatowners Indiana Effective: 11/20/2021       Account:         Policy Change Quoted       Pleasure Boatowners Indiana Effective: 11/20/2021       Account:         Policy Change Quoted       Pleasure Boatowners Indiana Effective: 11/20/2021       Account:         Policy Change Quoted       Pleasure Boatowners Indiana Effective: 11/20/2021       Account:         Policy Change Quoted       Pleasure Boatowners Indiana Effective: 11/20/2021       Account:         Policy Contract       Policy Number       Policy Period       11/06/2021 - 11/00         Policy Contract       Policy Address       TERRE HAUTE, IN 47803-1628       New Policy Full Term       5532.05         County       Vido       Underwriting Company       AMCO Insurance Company       Premium       5532.05         Vehicles       Underwriting Company       AMCO Insurance Company       Premium       5532.05         Underwriting       Premium Details       Cost Change Details       Applied Discounts/Surcharges       Premium         Policy Review       Policy Level Discount       Advance Quote Discount       Multi-Boat Discount       Multi-Boat Discount         Policy Review       Description ©       Advance Quote Discount       Multi-Boat Discount       Multi-Boat Discount
Step 9	
Action	Screen
The "Policy Change Bound" screen displays. This indicates the change is bound.	Desktop  < Account  < Bolicy  < Search  < Ieam Administration  < Testing  <   Policy Change (Bound) Pleasure Boatowners Indiana Effective: 11/20/2021 Account: Policy Change (I) has been bound. Vour Policy Change (I) has been bound. • Documents • Boatoments • Beview Changes • Go to your desktop

