

Add or Delete Additional Named Insured (Trusts) – Property/Umbrella PolicyCenter



Description

This job aid reviews how to add and delete an additional named insured for a Property or Umbrella policy. Additional Named Insureds most commonly include Trusts.

Select the link to advance to the desired procedure:

- [Add an Additional Named Insured](#)
- [Delete an Additional Named Insured](#)

Add an Additional Named Insured

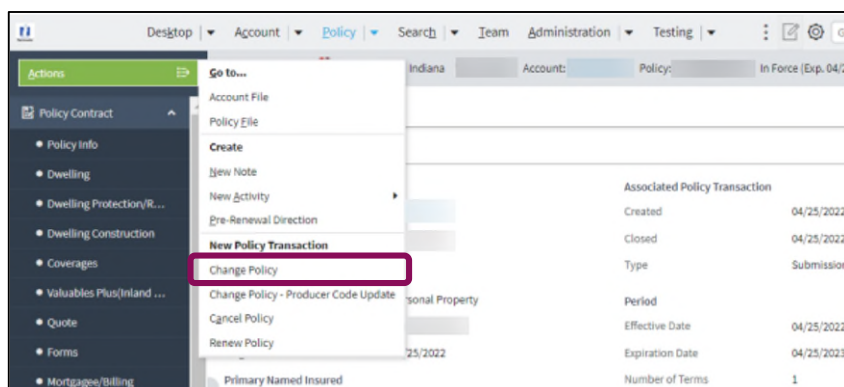
Step 1

Action

Open an existing property policy.

- Select the “Actions” button.
- Select “Change Policy” from the drop-down menu.

Screen



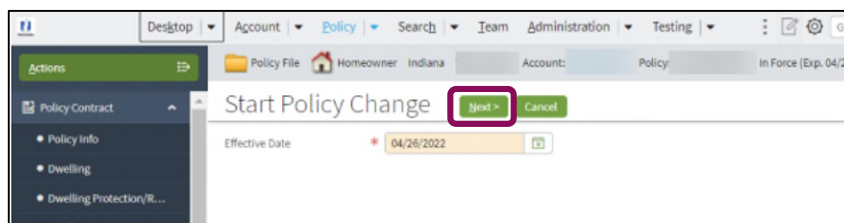
Step 2

Action

On the “Start Policy Change” screen, the “Effective Date” field defaults to the current date.

- If needed, you may enter a new date in the “Effective Date” field.
- Select the “Next >” button.

Screen



Add an Additional Named Insured, continued

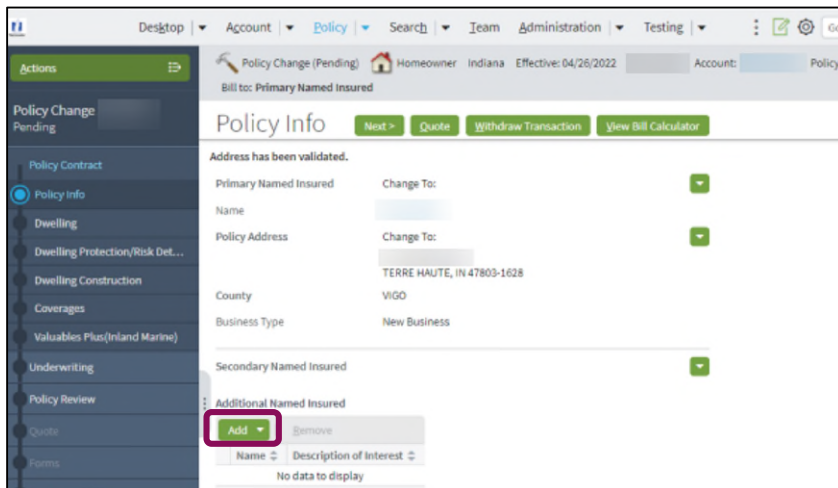
Step 3

Action

On the “Policy Info” screen:

- Select the “Add” button in the “Additional Named Insured” section.

Screen



The screenshot shows the 'Policy Info' screen in the PolicyCenter application. The left sidebar contains a menu with options like 'Policy Change Pending', 'Policy Contract', 'Policy Info' (selected), 'Dwelling', 'Dwelling Protection/Risk Det...', 'Dwelling Construction', 'Coverages', 'Valuables Plus(Inland Marine)', 'Underwriting', 'Policy Review', 'Quote', and 'Forms'. The main content area shows 'Policy Info' with a status of 'Policy Change (Pending)'. It includes fields for 'Primary Named Insured' (Name, Policy Address, County, Business Type) and 'Secondary Named Insured'. The 'Additional Named Insured' section is at the bottom, with an 'Add' button highlighted by a red box. Other buttons like 'Quote', 'Withdraw Transaction', and 'View Bill Calculator' are visible at the top right.

Step 4

Action

If the contact does not exist:

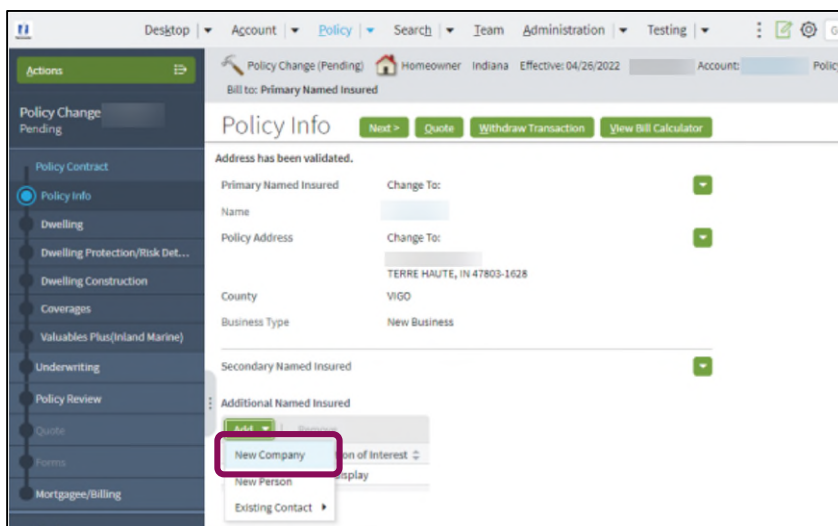
- Select “New Company” or “New Person”.

If the contact exists:

- Select the “Existing Contact” option.

In this example, select “New Company”.

Screen



This screenshot is similar to the one in Step 3, but it shows the dropdown menu that appears after clicking the 'Add' button. The menu options are 'New Company', 'New Person', and 'Existing Contact'. The 'New Company' option is highlighted by a red box, indicating it is the selected choice for this example.

Add an Additional Named Insured, continued

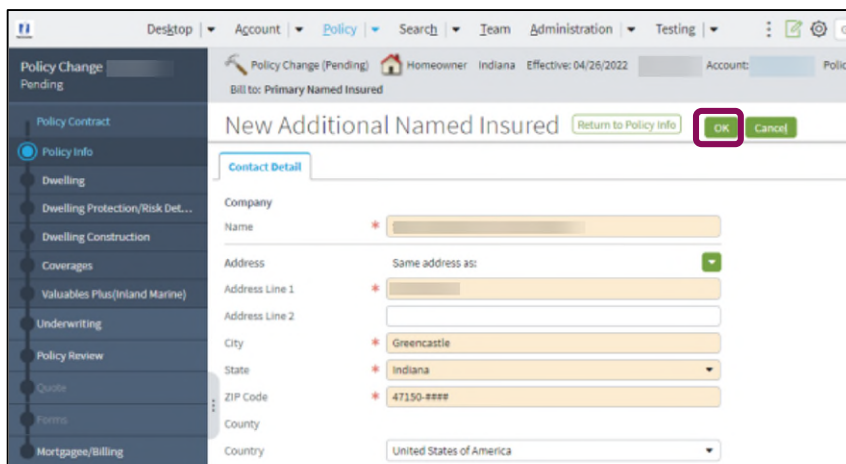
Step 5

Action

On the “New Additional Named Insured” screen:

- Enter information in the required fields.
- Select the “OK” button to return to the “Policy Info” screen.

Screen



Step 6

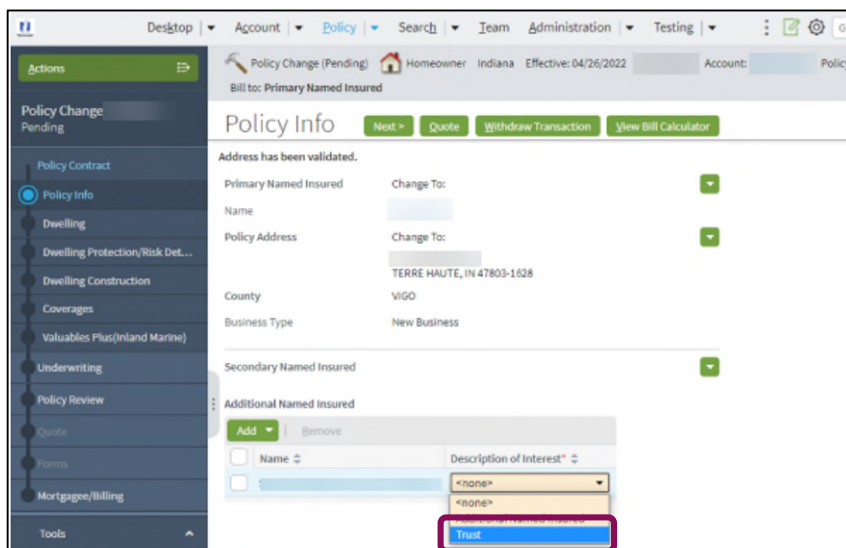
Action

On the “Policy Info” screen:

- Select the down arrow below the “Description of Interest” field.
- Select the appropriate interest from the drop-down list.

In this example, select “Trust”.

Screen



Add an Additional Named Insured, continued

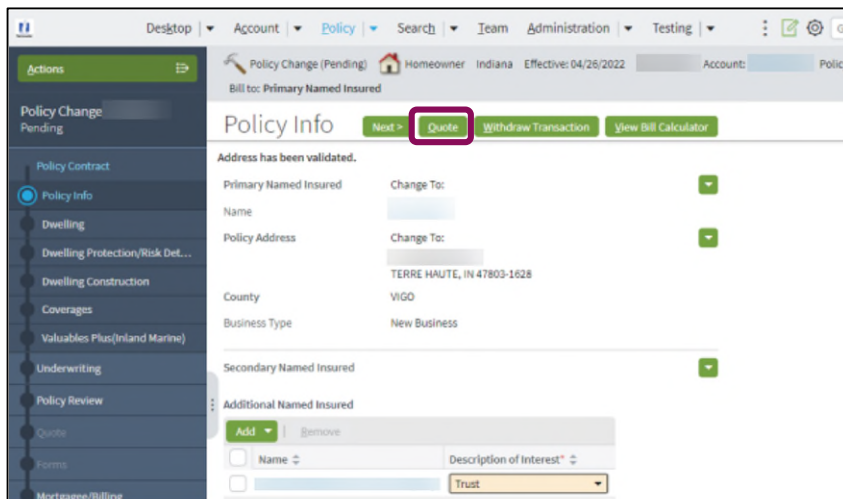
Step 7

Action

On the “Policy Info” screen:

- Select the “Quote” button.

Screen



Desktop | Account | Policy | Search | Team | Administration | Testing | Go

Policy Change (Pending) Homeowner Indiana Effective: 04/26/2022 Account: Policy

Bill to: Primary Named Insured

Policy Info Next > **Quote** Withdraw Transaction View Bill Calculator

Address has been validated.

Primary Named Insured Change To: [v]

Name [text box]

Policy Address Change To: [v]

TERRE HAUTE, IN 47803-1628

County VIGO

Business Type New Business

Secondary Named Insured [v]

Additional Named Insured

Add Remove

☐ Name [text box] Description of Interest* [text box]

☐ [text box] Trust [dropdown]

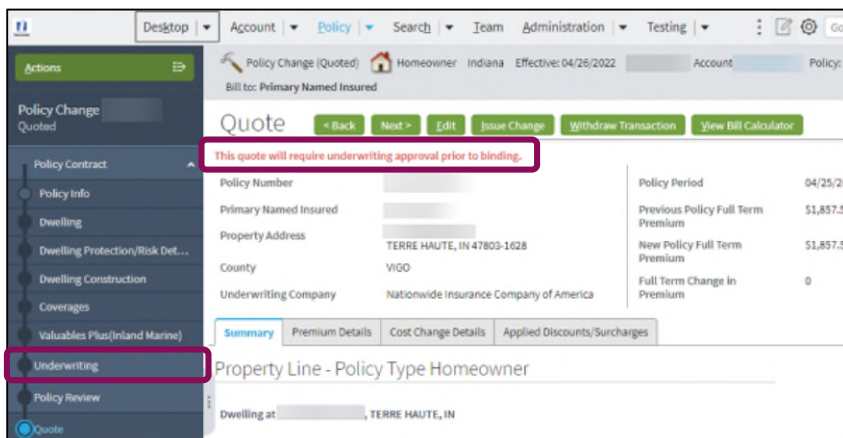
Step 8

Action

PolicyCenter will return a warning message in red, at the top of the “Quote” screen.

- Select the “Underwriting” link.

Screen



Desktop | Account | Policy | Search | Team | Administration | Testing | Go

Policy Change (Quoted) Homeowner Indiana Effective: 04/26/2022 Account: Policy

Bill to: Primary Named Insured

Quote < Back Next > Edit Issue Change Withdraw Transaction View Bill Calculator

This quote will require underwriting approval prior to binding.

Policy Number [text box] Policy Period 04/25/25

Primary Named Insured [text box] Previous Policy Full Term Premium \$1,857.5

Property Address TERRE HAUTE, IN 47803-1628 New Policy Full Term Premium \$1,857.5

County VIGO Full Term Change in Premium 0

Underwriting Company Nationwide Insurance Company of America

Summary Premium Details Cost Change Details Applied Discounts/Surcharges

Property Line - Policy Type Homeowner

Dwelling at [text box], TERRE HAUTE, IN

Add an Additional Named Insured, continued

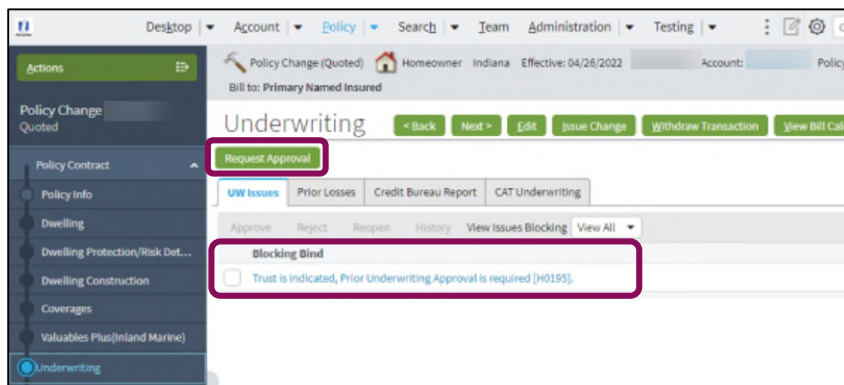
Step 9

Action

On the “Underwriting” screen, the “Blocking Bind” rule may trigger an Underwriting approval.

- Select the “Request Approval” button to send an activity to Underwriting.

Screen



Step 10

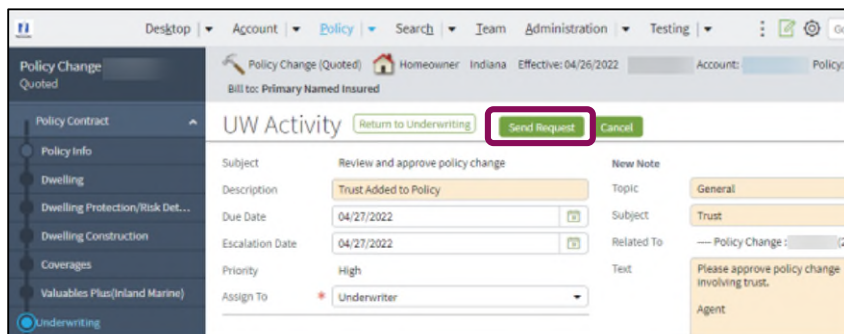
Action

On the “UW Activity” screen:

- Enter the appropriate information in the required fields.
- Select the “Send Request” button to send the activity to Underwriting.

Once approved, an activity will be received from Underwriting.

Screen



[Return to Top](#)

Delete an Additional Named Insured

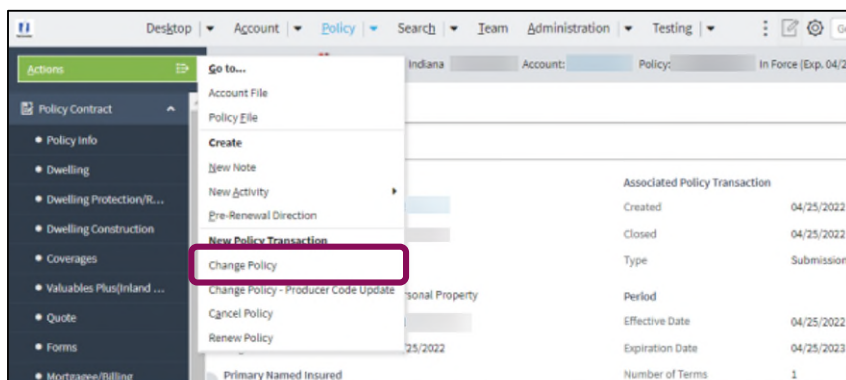
Step 1

Action

Open an existing property policy:

- Select the “Actions” button.
- Select “Change Policy” from the drop-down menu.

Screen



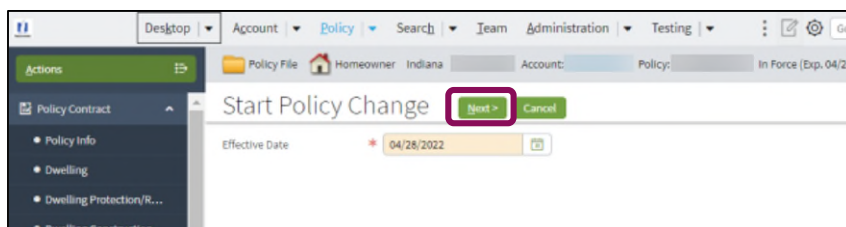
Step 2

Action

On the “Start Policy Change” screen, the “Effective date” field defaults to the current date.

- If needed, you may enter a new date in the “Effective Date” field.
- Select the “Next >” button.

Screen



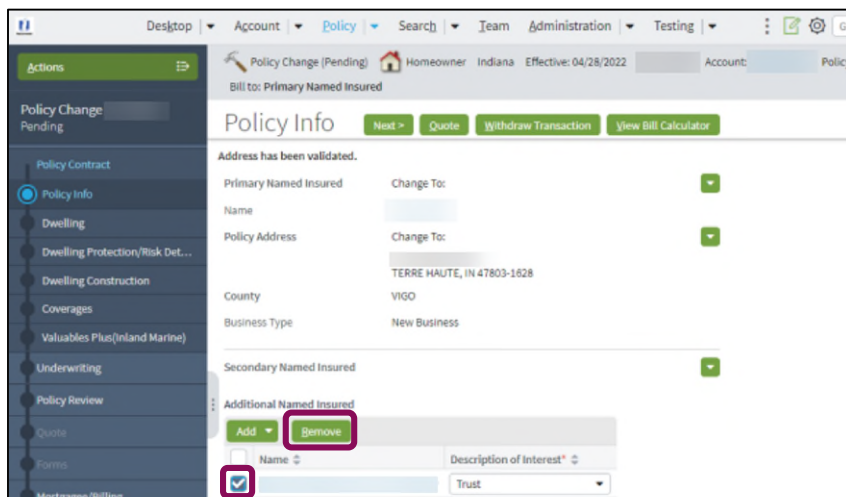
Step 3

Action

On the “Policy Info” screen:

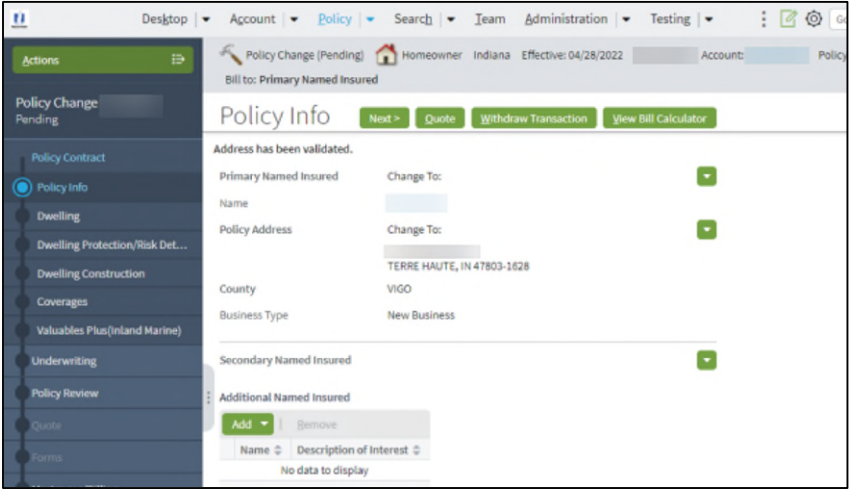
- Select the checkbox to the left of the name you wish to delete.
- Select the “Remove” button.

Screen



Delete an Additional Named Insured, continued

Step 4

Action	Screen
<p>The Additional Named Insured is deleted from the “Policy Info” screen.</p> <ul style="list-style-type: none">Quote and Issue the pending Policy Change.	

[Return to Top](#)

By accepting a copy of these materials:

(1) I agree that I am either: (a) an employee or Contractor working for Nationwide Mutual Insurance Company or one of its affiliates or subsidiaries (“Nationwide”); or (b) an Independent Sales Agent who has a contract and valid appointment with Nationwide; or (c) an employee of or an independent contractor retained by an Independent Sales Agent; or (d) an Independent Adjuster who has a contract with Nationwide; or (e) an employee of or an independent contractor retained by an Independent Adjuster.

(2) I agree that the information contained in this training presentation is confidential and proprietary to Nationwide and may not be disclosed or provided to third parties without Nationwide’s prior written consent.

(3) I acknowledge that: (i) certain information contained in this training presentation may be applicable to licensed individuals only and access to this information should not be construed as permission to perform any functions that would require a license; and (ii) I am responsible for acting in accordance with all applicable laws and regulations.

(4) I agree that I will return or destroy any material provided to me during this training, including any copies of such training material, when or if any of the following circumstances apply: (a) my Independent Sales Agent agreement with Nationwide is cancelled or I no longer hold any appointments with Nationwide; (b) my employment with or contract with a Nationwide Independent Sales Agent is terminated; (c) my Independent Adjuster contract with Nationwide is terminated; (d) my employment with or contract with a Nationwide Independent Adjuster is terminated; or (e) my employment or contract with Nationwide is terminated for any reason.