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	Screen
Open an existing property policy.	11 Desktop ▼ Account ▼ Policy ▼ Search ▼ Ieam Administration ▼ Testing ▼ : 🖉 🕲 G
 Select the "Actions" button. 	Actions Contact Count: Policy: In Force (Exp. 04/2)
 Select "Change Policy" from the drop- down menu. 	Policy Info Create Develling Develling Protection/R Develling Construction Develling Construction New Policy Transaction Coverages Change Policy Type
	Valuables Plus(Inland Change Policy - Producer Code Update sonal Property Period Quote Cancel Policy Forms Enew Policy 25/2022 Expiration Date 04/25/2022 Mortgagee/Bitling Primary Named Insured Number of Terms 1

Step 2

Action				S	creen			
On the "Start Policy Change" screen, the "Effective Date" field defaults to the current	<u>n</u>	Desktop	Account -	Policy -	Search 💌 Iea	n Administration	Policy	: 🖉 🙆 😡
date.	Actions	• •	Start Po	licy Char	nge	Cancel	Poney.	minute (table only a
 If needed, you may enter a new date in the "Effective Date" field. 	Policy Info Dwelling Dwelling Protection	r√R	Effective Date	* 0	4/26/2022			
 Select the "Next >" button. 								



Add an Additional Named Insured, continued

Step 3

Action	Screen
On the "Policy Info" screen: • Select the "Add" button in the "Additional Named Insured" section.	Desktop Account Retors Policy Change Policy Change Policy Change Policy Change Policy Change Policy Change Policy Contract. Policy Review Valuables Plact(nland Marine) Underwriting Policy Review Rame Policy Review Name Policy Review No data to display
Step 4	
Action	Screen
If the contact does not exist:Select "New Company" or "New Person".	Desktop Account Policy Search Ieam Administration Testing :: : : ::: :: ::: ::: ::: ::::::
<i>If the contact exists:</i>Select the "Existing Contact" option.	Policy Info Primary Named Insured Change To: Deveiling Name Deveiling Protection/Risk Det Policy Address Deveiling Construction TERRE HAUTE, IN 47803-1628 Coverages County Valuables Plus(Inland Marree) Business Type
In this example, select "New Company".	Underwriting Secondary Named Insured Policy Review Additional Named Insured New Company Do of Interest

Existing Contact



Add an Additional Named Insured, continued

Step 5

stop Account Policy Search Icam Administration Testing Search Account Policy Change (Pending) Homeowner Indiana Effective: 04/26/2022 Account Policy Bill to: Primary Named Insured New Additional Named Insured Contact Detail
Bill to: Primary Named Insured New Additional Named Insured Return to Policy Info Contact Detail
et Company Name * Address Same address as:
Address Line 2 City * Greencastle State * Indiana • ZIE Code * 47150-###

Step 6

Action	Screen
On the "Policy Info" screen: • Select the down arrow below the "Description of Interest" field.	Desktop Account Policy Search Ieam Administration Testing E Policy Change Policy Change Policy Change Policy Change Policy Info Next> Quote Withdraw Transaction Yew Bill Calculator
 Select the appropriate interest from the drop-down list. In this example, select "Trust". 	Policy Contract. Primary Named Insured Change To: Primary Named Insured Change To: Dwelling Policy Address Change To: TERRE HAUTE, IN 47803-1628 Coverages County Valuables Plus(Inland Marine) Business Type
	Underwriting Secondary Named Insured Policy Review Add To Bemove Cucle Name C Description of Interest* C Nortgagee/Billing Secondary Named Insured



Add an Additional Named Insured, continued

Step 7

Action	Screen
On the "Policy Info" screen:	11 Desktop • Account • Policy • Search • Jeam Administration • Testing • : 2 @ Go
 Select the "Quote" button. 	Actions Policy Change (Pending) Policy Homeowner Indiana Effective: 04/26/2022 Account: Policy Policy Change Bill to: Primary Named Insured Policy Change Policy Info Next > Quote Withdraw Transaction Yew Bill Calculator
	Policy Contract Address has been validated. Primary Named Insured Change To: Name
	Dwelling Policy Address Change To: Dwelling Protection/Risk Det TERE HAUTE, IN 47803-1628 Dwelling Construction County Coverages County Valuables Plus(Inland Marine) Underwriting Secondary Named Insured Policy Review I Additional Named Insured
Step 8	Roms Add • Bemove Roms Description of Interest* ‡ Mortaseee/Diffine Trust •
Action	Screen
PolicyCenter will return a warning message in red, at the top of the "Quote" screen.	Des <u>B</u> top Agcount Bolicy Search Ieam Administration Testing E Bolicy Change (Quoted) Policy Change Quoted Quote Quote Sack Not Edit (some Change Quicked) Withdraw Transaction (View Bill Calculator
	Policy Contract Policy Number Policy Number Policy Period 04/25/20
	Primary Named Insured Previous Policy Full Term \$1,857.55 Dwelling Premium
	Dwelling Protection/Risk Det Froperty Address TERRE HAUTE, IN 47803-1628 New Policy Full Term \$1,857.5 Dwelling Protection/Risk Det Fourthy MiGO Premium \$1,857.5
	Dwelling Construction County Product Product Pull Term Change in 0 Coverages Underwriting Company Nationwide Insurance Company of America Premium 0 Valuables Pluc[Inland Marine) Summary Premium Details Cost Change Details Applied Discounts/Surcharges
	Property Line - Policy Type Homeowner



Add an Additional Named Insured, continued

Step 9

Action	Screen
On the "Underwriting" screen, the "Blocking Bind" rule may trigger an Underwriting approval. • Select the "Request Approval" button to send an activity to Underwriting.	Desktop Account Bolicy Search Actions Policy Change Quoted Policy Change Quoted Underwriting Policy Contract Request Approval Credit Bureau Report CAT Underwriting Policy Info Dwelling Protection/Risk Det Diveling Construction Coverages Valuables Plus[Inland Marine) Quinderwriting Valuables Plus[Inland Marine) Quinderwriting
Step 10	
Action	Screen
On the "UW Activity" screen:Enter the appropriate information in the required fields.	Desktop Account Policy Search Ieam Administration Testing Testing Policy Change Quoted Policy Contract Policy Contract UW Activity Return to Underwriting Send Request Cascel
 Select the "Send Request" button to send the activity to Underwriting. 	Policy Info Subject Review and approve policy change New Note Dwelling Description Trust Added to Policy Topic General Dwelling Protection/Risk Det Due Date 04/27/2022 Subject Trust Dwelling Construction Escalation Date 04/27/2022 Related To — Policy Change: (20)

Priority

Assign To

High

* Unde

Once approved, an activity will be received from Underwriting.

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Please approve policy change involving trust.

Agent

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Delete an Additional Named Insured

Step 1

Action	Screen
Action	Ocicen
 Open an existing property policy: Select the "Actions" button. Select "Change Policy" from the drop- down menu. 	Image: Search Policy Policy Policy Policy Policy Policy In Force (Exp. 04/25) Actions Go to Actions Go to Policy Contract Policy Elle Policy Info Create New Activity Associated Policy Transaction Dwelling Protection/R Prevenued Direction Owelling Construction Created New Activity Created New Activity Created Develling Protection/R Change Policy Transaction Coverages Change Policy Producer Code Update Valuables Pfus(Inland Change Policy Quote Effective Date 04/25/2022 Primary Named Insured Number of Terms 1
Step 2	C ampan
Action	Screen
On the "Start Policy Change" screen, the "Effective date" field defaults to the current	Desktop ▼ Account ▼ Bolicy ▼ Search ▼ Ieam Administration ▼ Testing ▼ :

 If needed, you may enter a new date in the "Effective Date" field.

• Select the "Next >" button.

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Actions	Ð	Policy File	Homeowner Indiana	Account:	Policy:	In Force (Exp. 04/25
Policy Contract	^ ^	Start Pol	icy Change 🚺	t> Cancel		
Policy Info		Effective Date	* 04/28/2022			
Dwelling						
Dwelling Protection/	'R					
Dwelling Construction	10					

Step 3

date.

Action	Screen
 On the "Policy Info" screen: Select the checkbox to the left of the name you wish to delete. Select the "Remove" button. 	L Desigtop Account Rolicy Search Ieam Administration Testing E Image Im



Delete an Additional Named Insured, continued

Step 4

Action Screen The Additional Named Insured is deleted from the "Policy Info" screen. • Quote and Issue the pending Policy Change Policy Change Pending I tomorre Indiana Effective 04/28/2022 • ccount: • Policy Change Policy Info • voto will calculator • Quote and Issue the pending Policy Change Policy Change Policy Change Policy Info • voto will calculator • Policy Change Policy Info • voto will calculator • Policy Change Policy Info • voto will calculator • Voto vintat • Policy Change Te: • voto will calculator • Policy Change Policy Info • voto will calculator • Voto vintat • Policy Address • United Fourtation • TERE HAUTE, IN 417823-1628 • Contract • Voto vintation • TERE HAUTE, IN 417823-1628 • Voto vintation • Voto		
The Additional Named Insured is deleted from the "Policy Info" screen. • Quote and Issue the pending Policy Change. Policy Change Policy Info Note: Policy Info Policy Info Note: Policy Info Note: Policy Info Policy Info Name	Action	Screen
Policy Review # Quote Add T Porms Name 2 Description of Interest 2 No data to display	 The Additional Named Insured is deleted from the "Policy Info" screen. Quote and Issue the pending Policy Change. 	Desktop Account Actions Policy Change Policy Change Policy Change Policy Info North Owelling Owelling Desktop Velicy Contract. Policy Address Change To: Name Policy Address Change To: Name Policy Address Contract. Policy Address Change To: Name Policy Address Change To: Name Policy Address Contract. Policy Address Change To: Name Policy Address Contry Underwriting Policy Business Type New Business Valuables Plus[Inland Marine) Vorder Policy Broview Additional Named Insured No data to display

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