

How to Apply Excluded or Non-Driver to an Auto Policy



PolicyCenter

Description:

This job aid reviews how to apply excluded and non-driver status to listed drivers on an Auto policy and starts at the *Drivers* screen during the submission or policy change.

NOTE: Check your state guidelines in Reference Connect concerning excluded and non-drivers before you begin.

Step 1

Action

On the *Drivers* screen:

- Select the **Driver #** line for the driver to update the *Contact Detail* section.

Screen

#	Name	Date of Birth	Gender	Marital Status	Relationship to Insured	Driver Type
1	Veruca Salt	07/19/1984	Female	Single	Primary Named Insured	Driver
2	Victor Salt	03/16/2004	Male	Single	Child	Driver

Step 2

Action

On the **Contact Detail** tab:

- Click the down arrow to the right of the **Driver Type** field.
- Select the appropriate item (**Excluded** or **Non-Driver**) from the drop-down list.

Screen

Job Aid Process (Cont.) :

Step 3

Action	Screen
<p>Additional fields will display in the Contact Detail tab.</p> <ul style="list-style-type: none"> Click the down arrow to the right of the Reason field. Select the appropriate reason from the drop-down list. Proceed with the submission or policy change as usual. 	<p>The screenshot shows the 'Drivers' section of the PolicyCenter interface. The 'Contact Detail' tab is active, displaying fields for Person, Date of Birth, Age, Marital Status, and Gender. The 'Reason' field is highlighted with a red box, and its dropdown menu is open, showing several options. The 'Driver Type' is set to 'Excluded'.</p>

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