

Description:

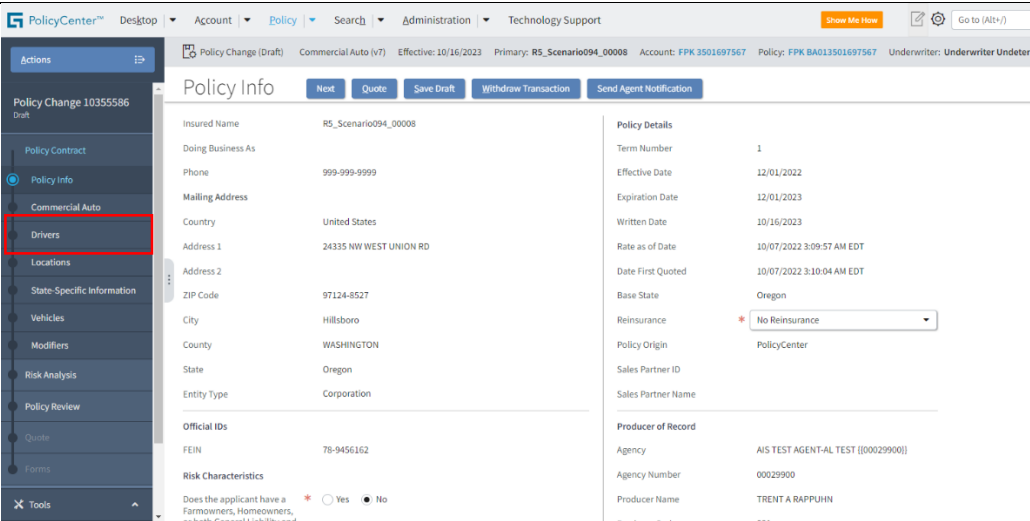
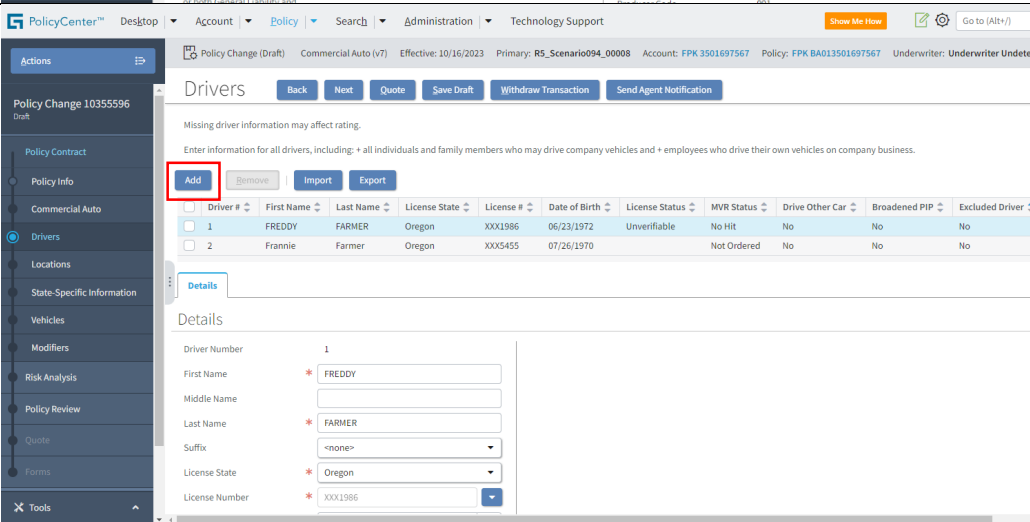
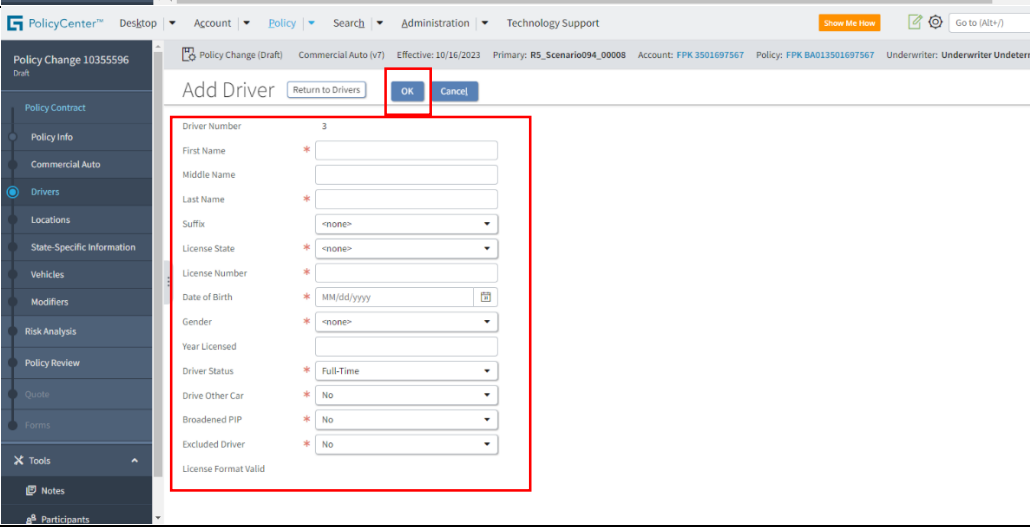
This job aid reviews how to add or remove a driver to an existing Farm policy.

Click each link below to jump to the relevant process steps:

- [Add a driver](#)
- [Remove a driver](#)
- [Refer to underwriting](#)

Add a driver

Step	Action	Screen
1	Open an existing Auto policy: - Click Actions - Select Change Policy from the drop-down menu	The screenshot shows the PolicyCenter Desktop interface. The left sidebar contains a 'Policy Contract' section with various options like Policy Info, Commercial Auto, Drivers, Locations, etc. The 'Actions' menu is open, showing options like 'Go to...', 'Account File', 'Policy File', 'Policy Group', 'Create', 'New Note', 'New Policy Transaction', 'Change Policy', and 'Cancel Policy'. The 'Change Policy' option is highlighted with a red box. The main area displays policy details for 'Commercial Auto (v7)' with account 'R5_Scenario094_00008' and policy 'FPK 3501697567'. The 'Summary' tab is active, showing details like Effective Date (12/01/2022), Expiration Date (12/01/2023), Term Number (1), Total Surcharges / Assessments, Total Cost (\$1,116.00), Total Premium (\$1,116.00), and Producer of Record (AIS TEST AGENT-AL TEST).
2	On the <i>Start Policy Change</i> screen, the Effective Date field defaults to the current date: - Enter the appropriate date in the Effective Date field - Click Next	The screenshot shows the 'Start Policy Change' screen. The 'Effective Date' field is highlighted with a red box, showing a date picker with the date '10/16/2023'. The 'Next >' button is also highlighted with a red box. The main area displays policy details for 'Commercial Auto (v7)' with account 'R5_Scenario094_00008' and policy 'FPK 3501697567'. The 'Summary' tab is active, showing details like Effective Date (12/01/2022), Expiration Date (12/01/2023), Term Number (1), Total Surcharges / Assessments, Total Cost (\$1,116.00), Total Premium (\$1,116.00), and Producer of Record (AIS TEST AGENT-AL TEST).

3	On the <i>Policy Info</i> screen: Click the Drivers link	
4	On the <i>Drivers</i> screen: Click Add	
5	In the <i>Add Driver</i> section: - Enter the appropriate driver information - Select OK	

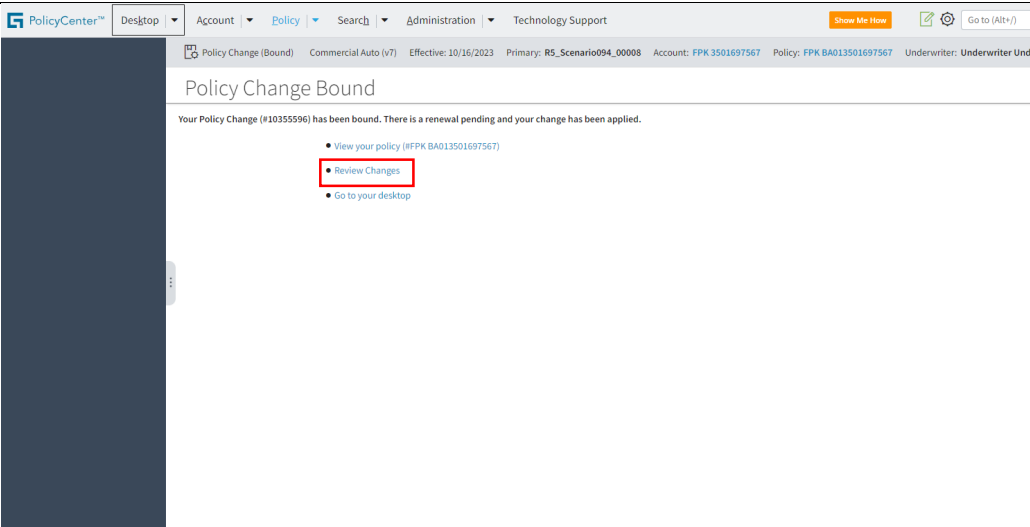
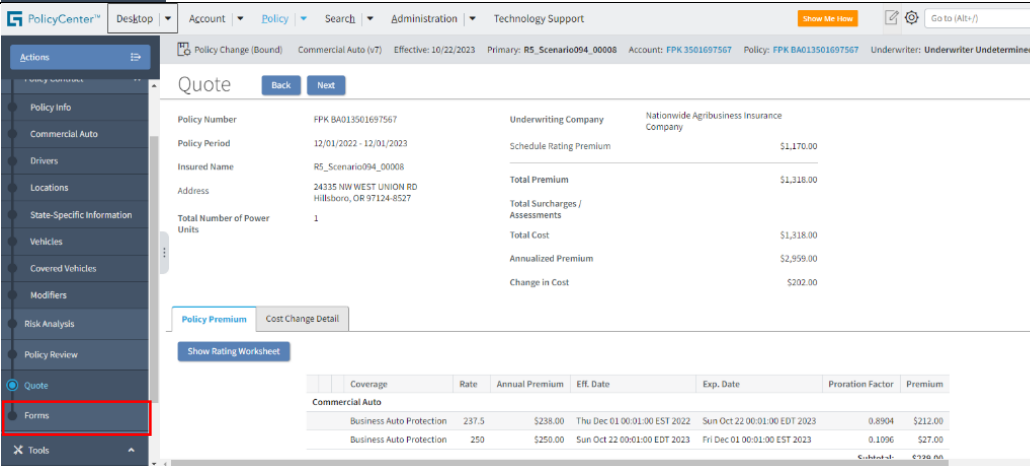
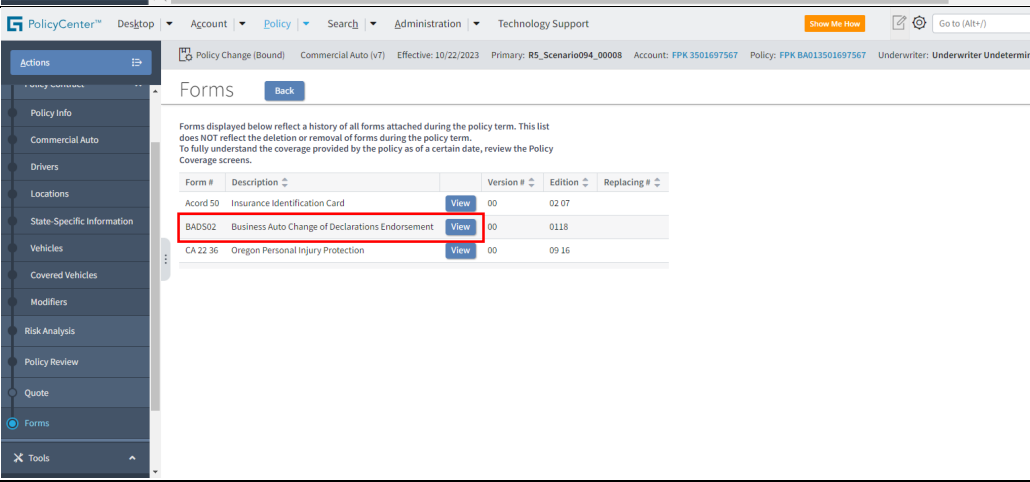
6 Select Quote

PolicyCenter Desktop Account Policy Search Administration Technology Support
Policy Change (Draft) Commercial Auto (v7) Effective: 10/16/2023 Primary: R5_Scenario094_00008 Account: FPK.3501697567 Policy: FPK.BA013501697567 Underwriter: Underwriter Und
Drivers
Missing driver information may affect rating.
Enter information for all drivers, including: + all individuals and family members who may drive company vehicles and + employees who drive their own vehicles on company business.
Add Remove Import Export
Driver # First Name Last Name License State License # Date of Birth License Status MVR Status Drive Other Car Broadened PIP Excluded Drive
1 FREDDY FARMER Oregon XXX1986 06/23/1972 Unverifiable No Hit No No No
2 Frannie Farmer Oregon XXX5455 07/26/1970 Not Ordered No No No
3 John Smith Ohio XXX4567 03/18/1983 No No No
Details
Driver Number 3
First Name * John
Middle Name
Last Name * Smith
Suffix <none>
License State * Ohio

- 7 Once quoted:
- The **Total Premium** is the full-term premium including the prorated amount for this change. The **Total Cost** is same as the Total Premium.
 - The **Annualized Premium** is full-term premium assuming that all changes, including this change, were effective for a full-term
 - **Change in Cost** is the prorated premium related to this change
 - For more in depth information about the quote premium, select the Cost Change Detail tab
 - *If the quote print(s) are needed, click the Forms link on the left side of the screen*

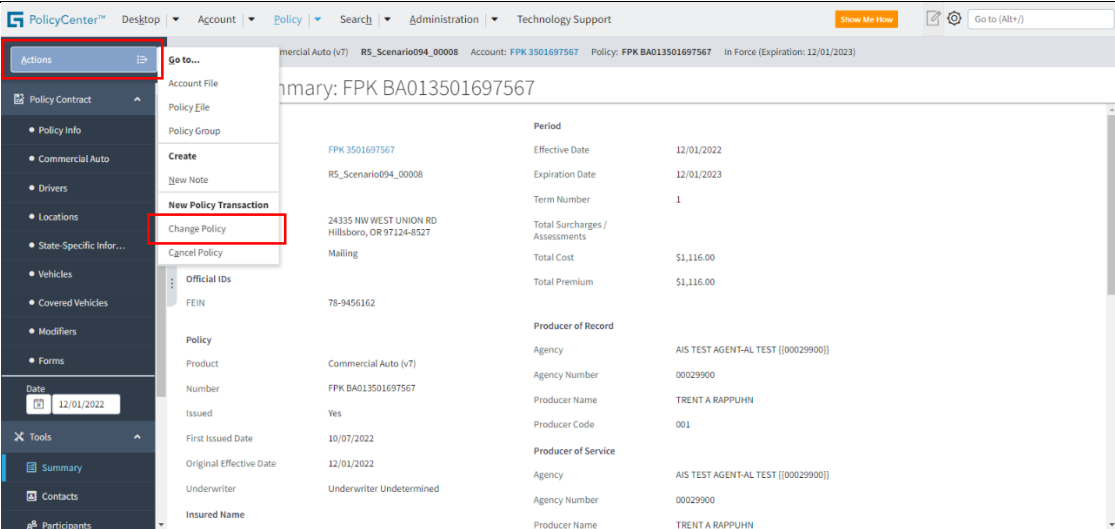
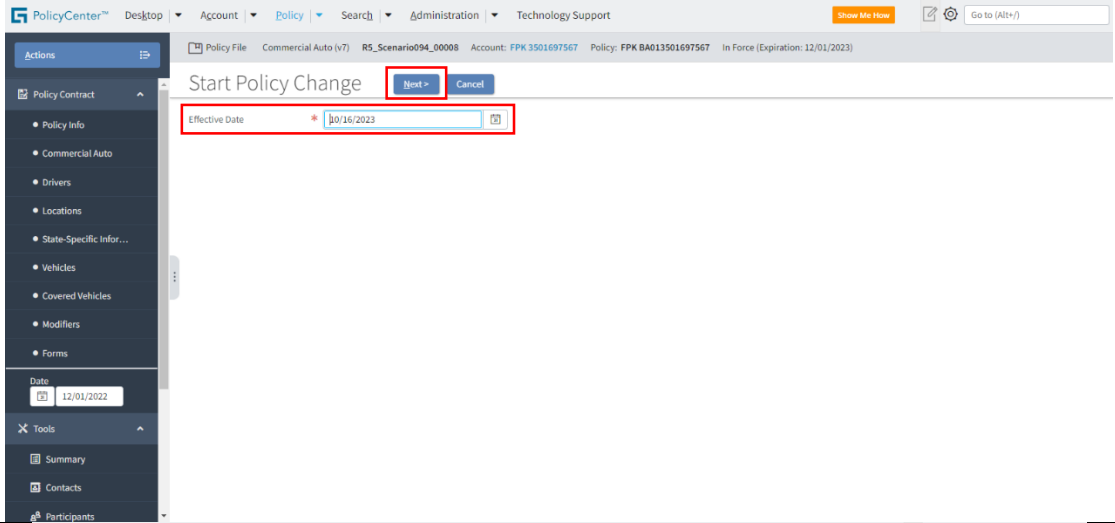
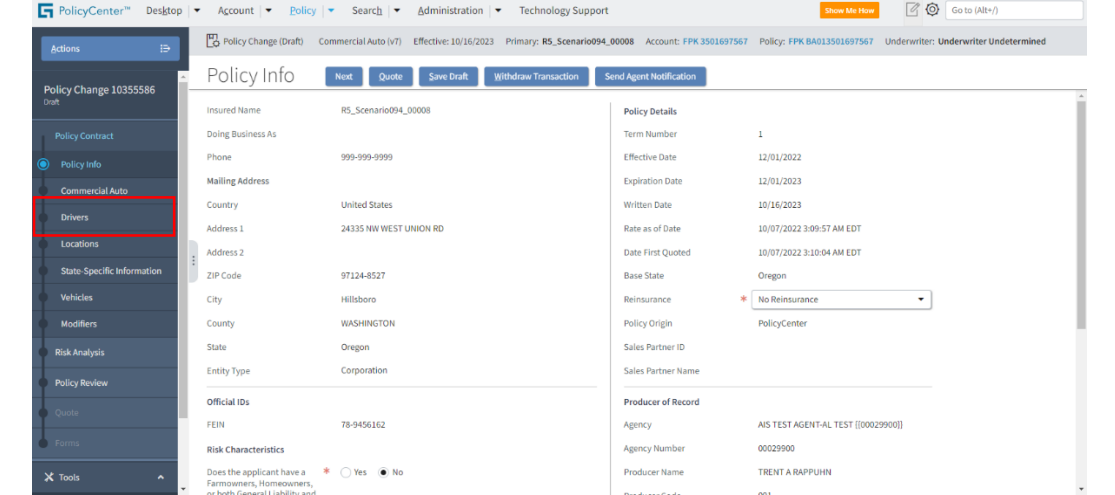
PolicyCenter Desktop Account Policy Search Administration Technology Support
Policy Change (Quoted) Commercial Auto (v7) Effective: 10/16/2023 Primary: R5_Scenario094_00008 Account: FPK.3501697567 Policy: FPK.BA013501697567 Underwriter: Underwriter Und
Quote
Back Next Release Lock Edit Policy Transaction Save Draft Issue Policy Withdraw Transaction Send Agent Notification
Policy Number FPK.BA013501697567 Underwriting Company Nationwide Agribusiness Insurance Company
Policy Period 12/01/2022 - 12/01/2023 Schedule Rating Premium \$1,170.00
Insured Name R5_Scenario094_00008 Total Premium \$1,263.00
Address 24335 NW WEST UNION RD Hillsboro, OR 97124-8527 Total Surcharges / Assessments
County WASHINGTON Total Cost \$1,263.00
Total Number of Power Units 1 Annualized Premium \$2,276.00
Change in Cost
Policy Premium Cost Change Detail
Override Rating Show Rating Worksheet
Coverage Rate Annual Premium Eff. Date Exp. Date Proration Factor Premium
Commercial Auto
Business Auto Protection 237.5 \$238.00 Thu Dec 01 00:01:00 EST 2022 Mon Oct 16 00:01:00 EDT 2023 0.8740 \$208.00
Business Auto Protection 250 \$250.00 Mon Oct 16 00:01:00 EDT 2023 Fri Dec 01 00:01:00 EST 2023 0.1260 \$32.00
Subtotal: \$240.00
1: 24335 NW WEST UNION RD, Hillsboro, OR

- Agent can click **Issue Policy** if change is requested
- To amend the quote, click **Edit Policy Transaction**
- If agent needs to return to the quote, select **Save Draft**
- If change is not needed, select **Withdraw Transaction**
- *Quotes stay on PolicyCenter for 30 days*

8	Once issued, the Policy Change Bound screen will populate. Prints can be accessed next by clicking Review Changes.	 The screenshot shows the 'Policy Change Bound' screen in the PolicyCenter interface. The left-hand menu is visible, and the main content area displays a message: 'Your Policy Change (#10355596) has been bound. There is a renewal pending and your change has been applied.' Below this message, there are three links: 'View your policy (FFPK BA013501697567)', 'Review Changes' (highlighted with a red box), and 'Go to your desktop'.
9	Select Forms from the left-hand menu	 The screenshot shows the 'Quote' screen in the PolicyCenter interface. The left-hand menu is visible, and the 'Forms' option is highlighted with a red box. The main content area displays a quote summary for 'Commercial Auto' with various details like Policy Number, Policy Period, Insured Name, Address, and Total Premium.
10	Select View next to Business Auto Change of Declarations Endorsement	 The screenshot shows the 'Forms' screen in the PolicyCenter interface. The left-hand menu is visible, and the 'Forms' option is highlighted with a red box. The main content area displays a list of forms, including 'Business Auto Change of Declarations Endorsement' (highlighted with a red box), which has a 'View' button next to it.

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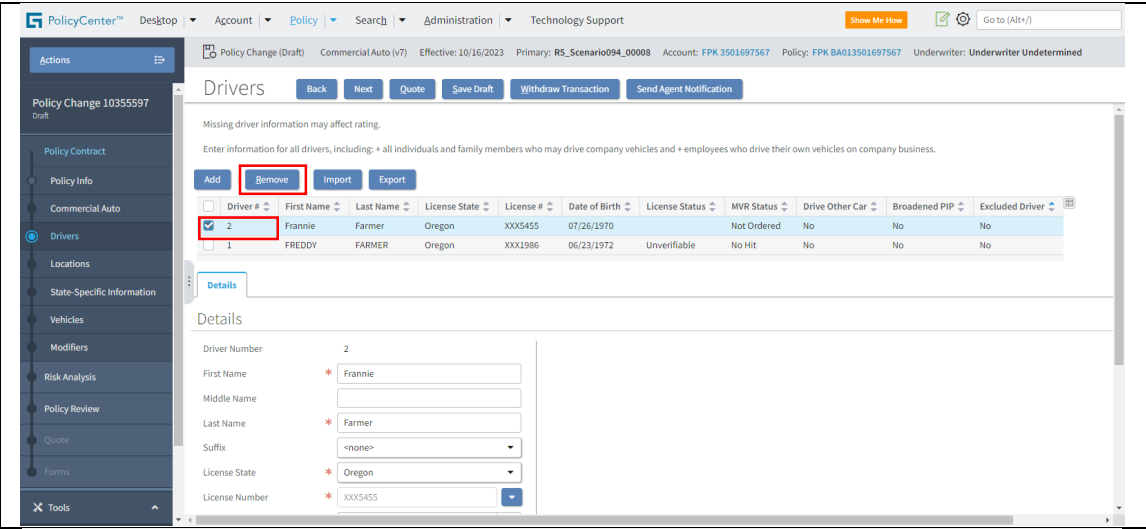
Remove a driver

Step	Action	Screen
1	Open an existing Auto policy: - Click Actions - Select Change Policy from the drop-down menu	 The screenshot shows the PolicyCenter interface. On the left, the 'Actions' menu is open, and 'Change Policy' is highlighted. The main area displays policy details for 'Commercial Auto (v7)' with policy number 'FPK BA013501697567'.
2	On the <i>Start Policy Change</i> screen, the Effective Date field defaults to the current date: - Enter the appropriate date in the Effective Date field - Click Next	 The screenshot shows the 'Start Policy Change' screen. The 'Effective Date' field is highlighted, showing a default date of '10/16/2023'. A 'Next' button is also highlighted.
3	On the <i>Policy Info</i> screen: Click the Drivers link	 The screenshot shows the 'Policy Info' screen. In the left sidebar, the 'Drivers' link is highlighted. The main area displays policy details for 'Commercial Auto (v7)' with policy number 'FPK BA013501697567'.

4

Select the check box to the left of the driver # to be removed

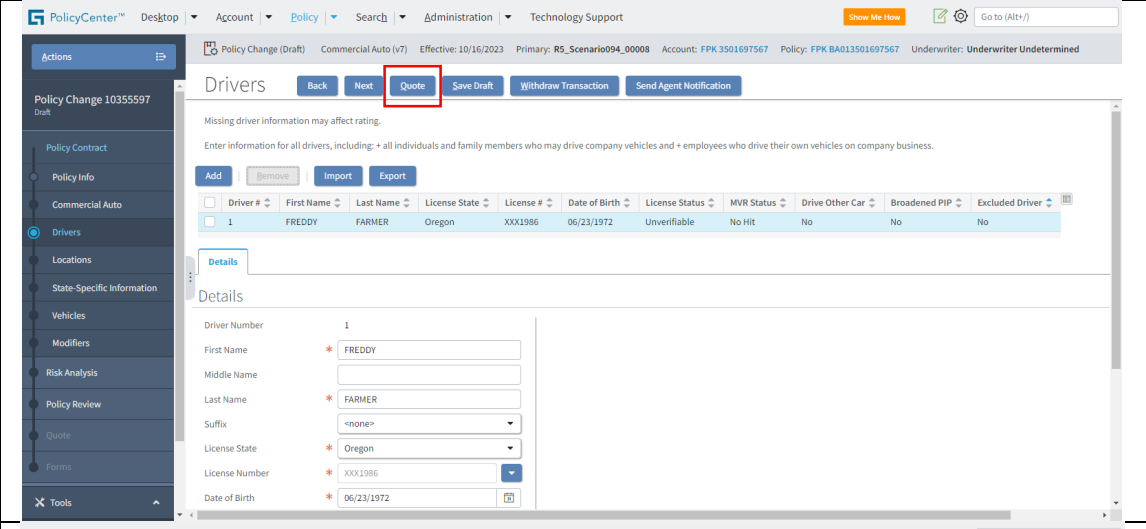
- Click **Remove**



5

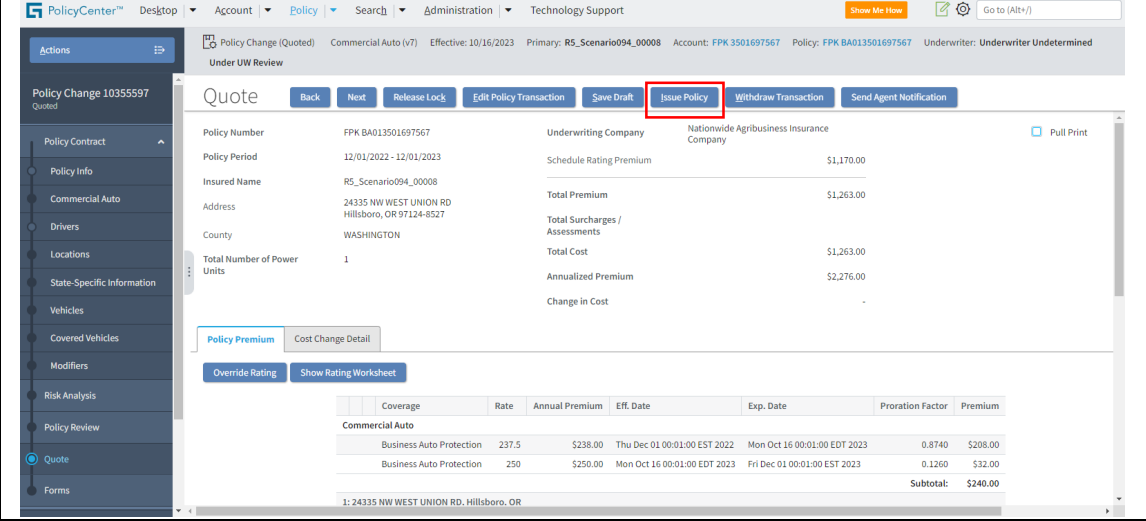
Select **Quote**

If the quote print(s) are needed, click the Forms link on the left side of the screen

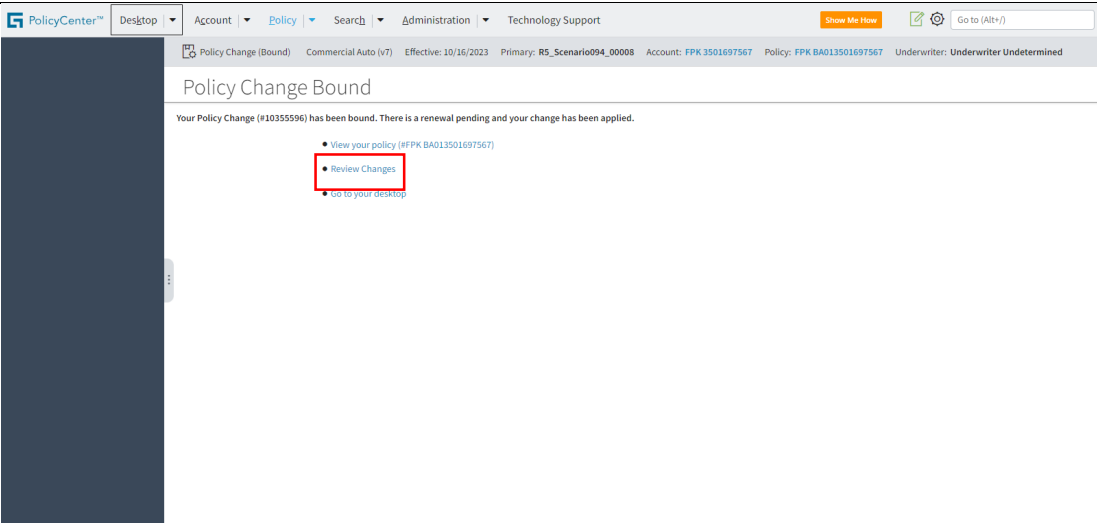


6

Select **Issue Policy**



7
Once issued, the Policy Change Bound screen will populate. Prints can be accessed by clicking Review Changes and Forms on the following screen

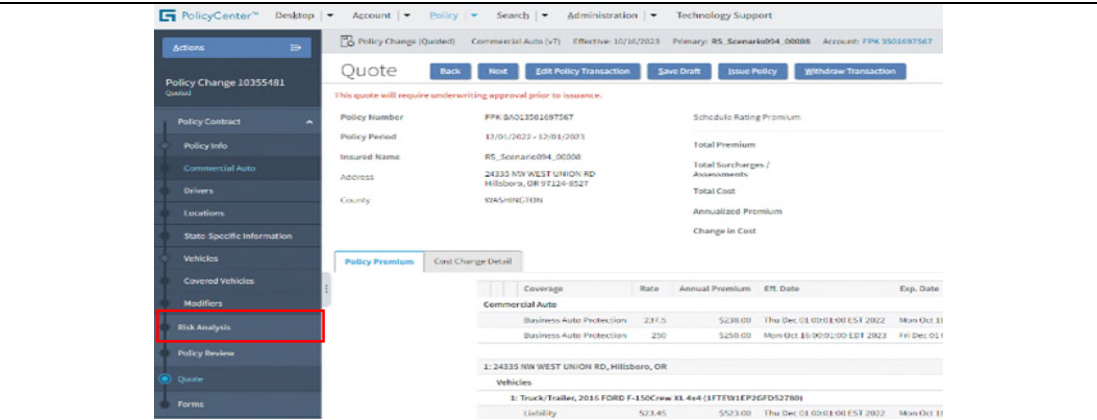


The screenshot shows the 'Policy Change Bound' screen in the PolicyCenter system. The page title is 'Policy Change Bound'. Below the title, a message states: 'Your Policy Change (#10355596) has been bound. There is a renewal pending and your change has been applied.' A list of actions is displayed, including 'View your policy (FFPK BA013501697567)', 'Review Changes' (highlighted with a red box), and 'Go to your desktop'.

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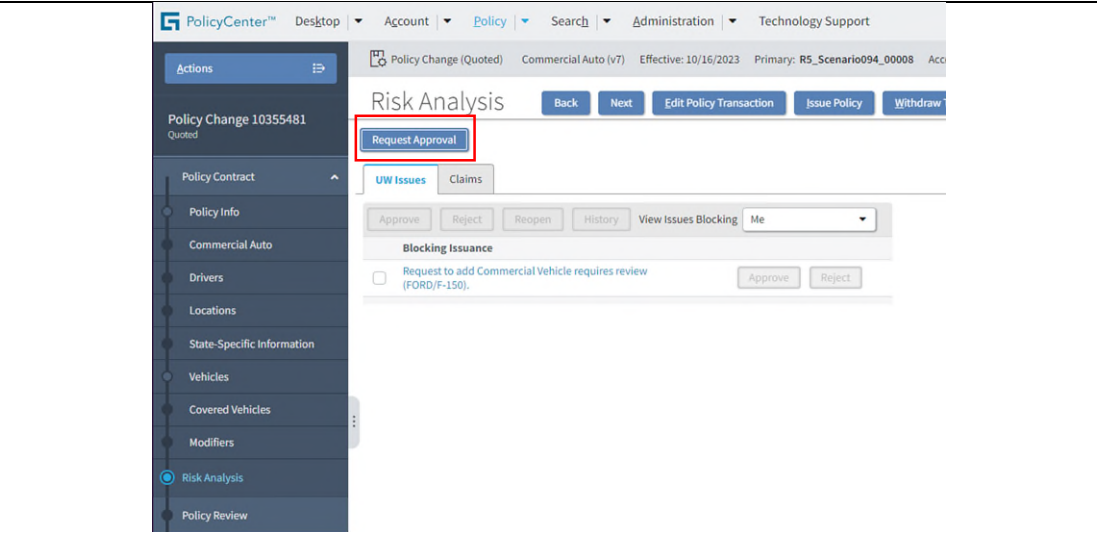
Refer to Underwriting

1
If underwriter referral is required, select Risk Analysis



The screenshot shows the 'Quote' screen in the PolicyCenter system. The page title is 'Quote'. Below the title, a message states: 'This quote will require underwriting approval prior to issuance.' A list of actions is displayed, including 'Back', 'Next', 'Edit Policy Transaction', 'Save Draft', 'Issue Policy', and 'Withdraw Transaction'. The 'Risk Analysis' link in the left sidebar is highlighted with a red box.

2
Select Request Approval



The screenshot shows the 'Risk Analysis' screen in the PolicyCenter system. The page title is 'Risk Analysis'. Below the title, a message states: 'Request to add Commercial Vehicle requires review (FORD/F-150)'. A list of actions is displayed, including 'Request Approval' (highlighted with a red box), 'UW Issues', 'Claims', 'Approve', 'Reject', 'Reopen', 'History', 'View Issues Blocking', and 'Me'.

3	Complete the requested information: Referrals to underwriting lock that line of business until reviewed by underwriting, but do not affect other lines of business on the account Select Update Complete Are you sure you want to request approval? Select OK	PolicyCenter™ Desktop Account Policy Search Administration Technology Support Policy Change 10355481 Quoted Policy Change (Quoted) Commercial Auto (v7) Effective: 10/16/2023 Primary: R5_Scenario094_00008 Account: FPK 3501697567 Pol New Note Return to Risk Analysis Update Cancel Note Topic Subject Contact Name * Preferred Contact Method * Phone Email Phone Email Related To -- Policy : FPK BA013501697567 Security Level Unrestricted Text
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