

Add, Replace, and Remove a PowerSports Recreational Vehicle

In Brief

In this Quick Card, a policyholder purchased a new recreational vehicle, traded a RV for a different one, and got rid of a RV. She would like to add the new RV and the traded RV to her existing Auto policy, and remove a RV she no longer owns.

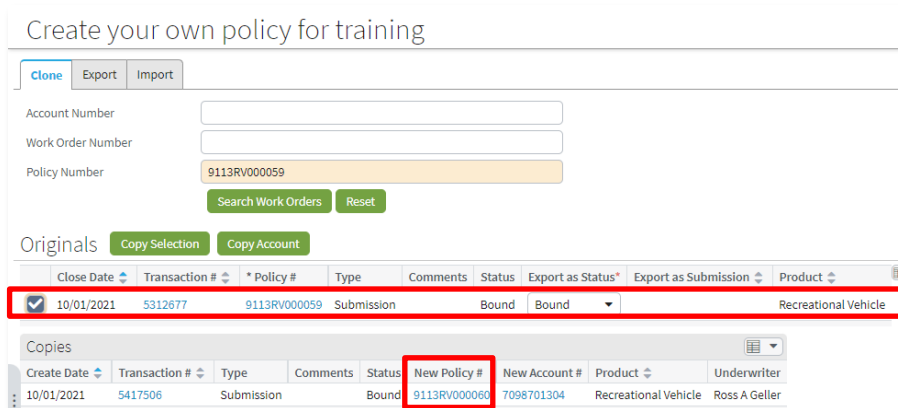
Log in to the [VTO](#) using the appropriate generic user account from the **VTO Quick Start Guide** document.

Quick Card

IMPORTANT: This is a test environment. The next seven (7) steps are ONLY used in the VTO.

Clone the Policy

1. Click the down arrow to the right of the **Training** button on the **Tab Bar**. Select **"Create your own policy for training"** from the drop-down menu.
2. Enter **"9113RV000059"** in the **Policy Number** field exactly as it is shown, including spaces and capital letters.
3. Click the **Search Work Orders** button.
4. In the *Originals* section, click the checkbox to the left of the **Submission** Transaction Type for the policy being cloned. In this example, select the checkbox to the left of Transaction #**5312677**.



Create your own policy for training

Clone Export Import

Account Number

Work Order Number

Policy Number

Search Work Orders Reset

Originals Copy Selection Copy Account

Close Date	Transaction #	Policy #	Type	Comments	Status	Export as Status	Export as Submission	Product
<input checked="" type="checkbox"/>	10/01/2021	5312677	9113RV000059	Submission	Bound	Bound		Recreational Vehicle

Copies

Create Date	Transaction #	Type	Comments	Status	New Policy #	New Account #	Product	Underwriter
10/01/2021	5417506	Submission		Bound	9113RV000060	7098701304	Recreational Vehicle	Ross A Geller

5. Click the **Copy Selection** button.
- Note:** If the *Copies* section does not automatically populate, click on the **Search** tab, then back on the **Training** tab. The clone information should be visible.
6. Scroll down, if necessary, to the *Copies* section.
7. Click the link in the **New Policy #** column.

IMPORTANT: PolicyCenter automatically created a **New Account #**. The new account is linked to the *cloned* policy, not the original.



Add, Replace, and Remove a RV

Summary screen

8. Click the **Actions** button.
9. Select “**Change Policy**” from the drop-down menu.

Start Policy Change screen

10. PolicyCenter defaults the **Effective Date** to the current system date. If necessary, you can change the date to a future date. In this example, accept the current date.
11. Click the **Next >** button.

Policy Info screen

12. Click the **Vehicles** link.

Vehicles screen

13. Review the vehicle listed on the **Vehicle Details** tab.
14. Click the **Create Vehicle** button.
15. In the *Basic Vehicle Information* section:
 - Select “**Travel Trailer**” from the **Vehicle Type** drop-down list.
 - Enter “**WDAPF4CC5F9635751**” in the **VIN** field.
 - Enter “**2016**” in the **Year** field.
 - Select “**Riverside Travel Trailer**” from the **Make** drop-down list.
 - Select “**Riverside Toy Hauler Trailers**” from the **Model** drop-down list.
 - Enter “**11000**” in the **Market Value** field.
 - Enter “**03162016**” in the **Purchase Date** field.
 - Select “**Pleasure < 30 days**” in the **Primary Use** field.
 - Ensure the **Registration State** field is completed.
16. Review the vehicles listed in the *Vehicle Details* section.
17. Select the checkbox to the left of **2013 Born Free Motorcoach**.
18. Click the **Replace Vehicle** button.

In the *Basic Vehicle Information* section:

- Enter "1F66F5DY5K0A13709" in the **VIN** field.
- Enter "2014" in the **Year** field.
- Select "Tiffin Motorhomes" from the **Make** drop-down list.
- Select "Ilegro Breeze Class A" from the **Model** drop-down list.
- Click the radio button to the left of **Allegro Breeze Class A Motorhomes 113976** and click the **OK** button.
- Enter "75000" in the **Market Value** field.
- Enter "03162020" in the **Purchase Date** field.
- Ensure "Pleasure < 30 days" is selected in the **Primary Use** field.
- Ensure the **Registration State** field is completed.

19. Select the checkbox to the left of the **2012 American Coach**.

20. Click the **Remove Vehicle** button.

21. Review the remaining vehicles listed in the *Vehicle Details* section.

22. Click the **Coverages** link

Coverages screen

23. Click the **Clear** button to remove any messages in the **Validation Results** section.

24. In the *Vehicle Level Coverages* section, ensure the correct coverages are selected.

25. Make any desired updates to the coverages as needed.

26. Click the **Quote** button.

IMPORTANT: This is a test environment. This data is not valid. The VTO is not connected to the rating system, but in production, you will see the correct premium.

27. Click the **Policy Review** link.

Policy Review screen

28. Review the changes to the policy.

29. Click the **Issue Change** button.

30. Click the **OK** button.

Policy Change Bound screen

PolicyCenter displays the message, "Your Policy Change (#XXXX) has been bound."