

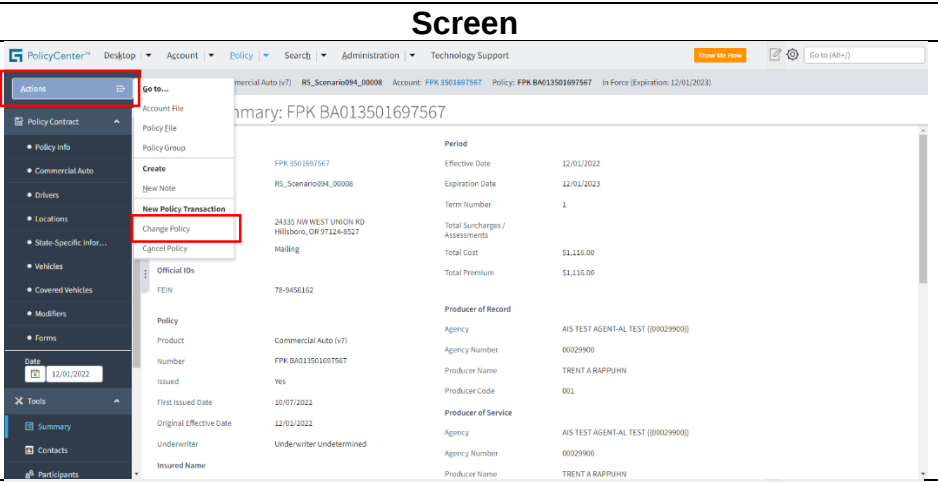
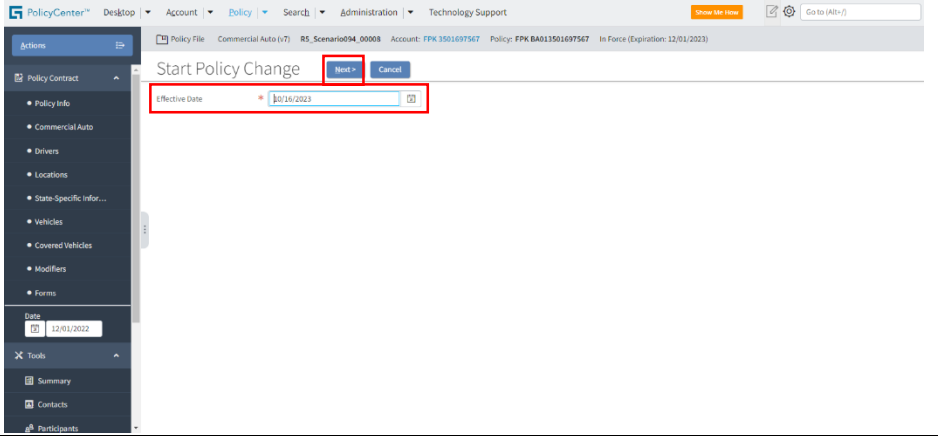
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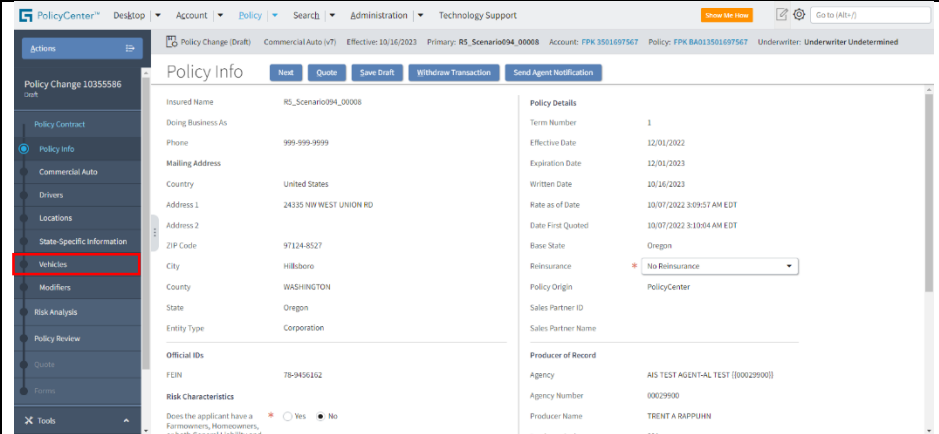
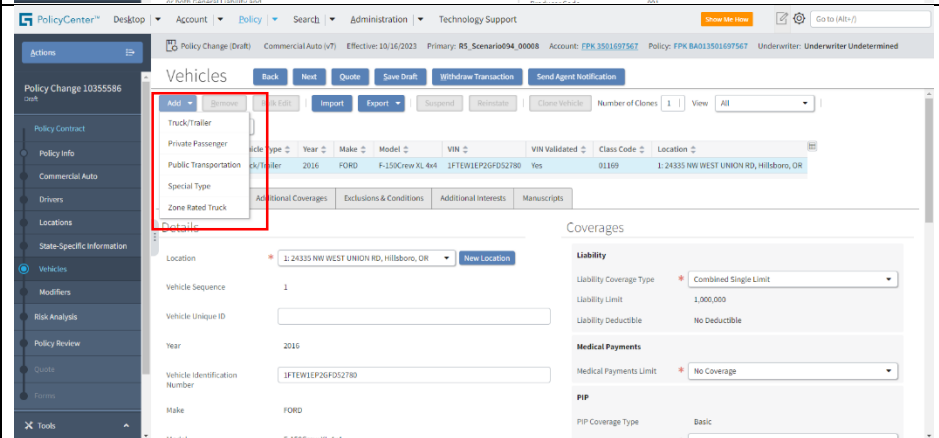
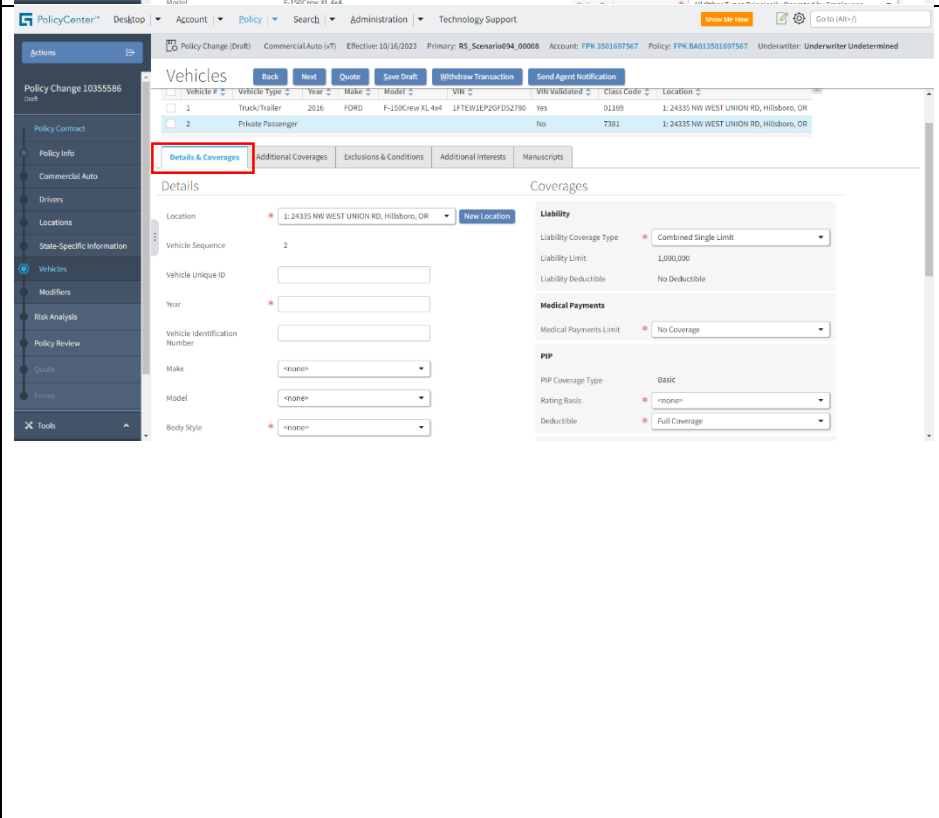
This job aid reviews how to add or remove a vehicle to an existing Farm policy.

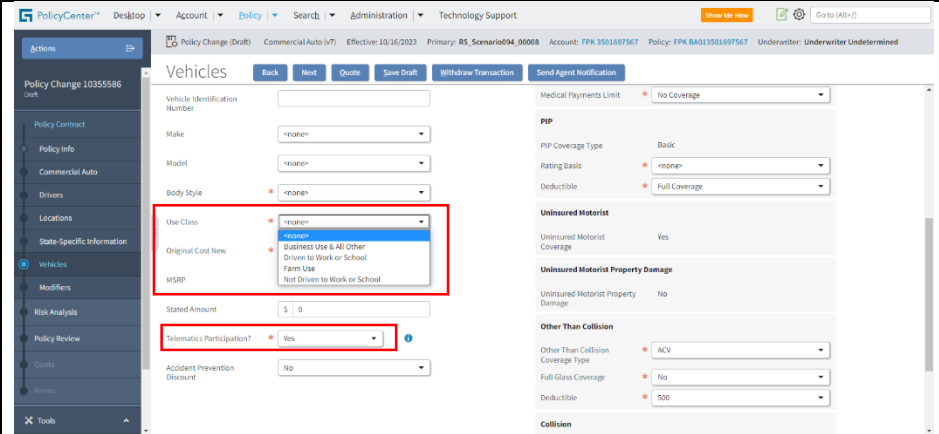
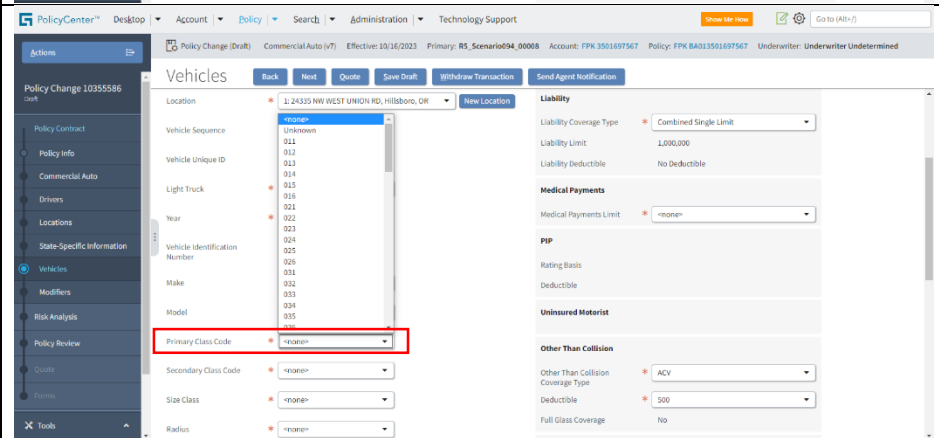
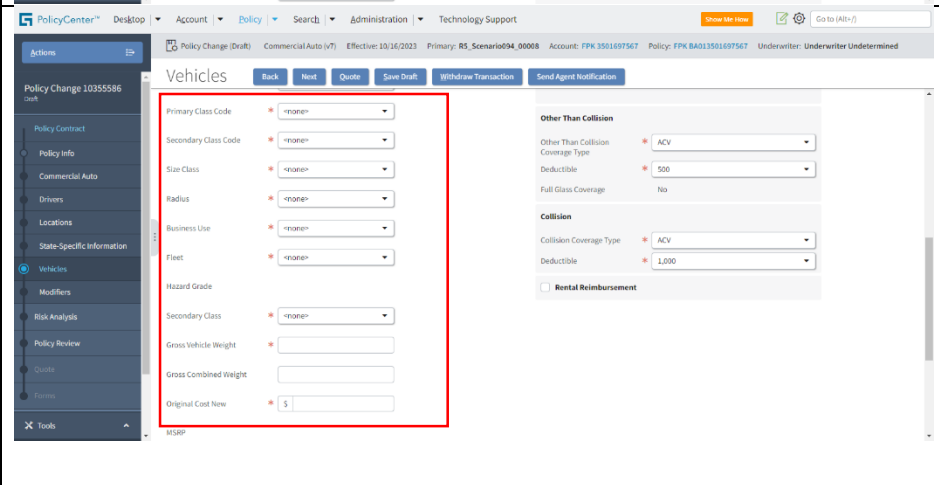
Click each link below to jump to the relevant process steps:

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

Add a vehicle

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 'Actions' menu is open, and 'Change Policy' is highlighted. The background shows policy details for 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 date picker with 12/16/2022 selected. A 'Next' button is visible.

3	On the <i>Policy Info</i> screen: Click the Vehicles link	
4	On the <i>Vehicles</i> screen: - Click Add - Select type of vehicle you are adding - <i>Truck/Trailer, Private Passenger, etc.</i>	
5	In the <i>Details and Coverages</i> section: - Enter the appropriate information into the Year field - Enter the appropriate information into the VIN field - Press the Tab key or click outside of the VIN field to populate the remaining basic vehicle information - If vehicle information does not populate, fill in <i>Make, Model, and Original Cost New</i> fields <i>Gross Vehicle Weight</i> is required for Truck/Trailer <i>Body Style</i> is required for Private Passenger	

6	If private passenger vehicles are selected: - Select the appropriate Use Class - Select Telematics Participation (not required)	
7	If Truck/Tractor is selected: For the <i>Primary Class Code</i> and <i>Secondary Class Code</i> select Unknown	
8	If Unknown was selected for the primary class codes, fill in the following fields: - Size Class - Radius - Business Use – <i>Farm defaults to Service</i> - Fleet - Once these fields are completed, the primary classification will populate - See chart below	

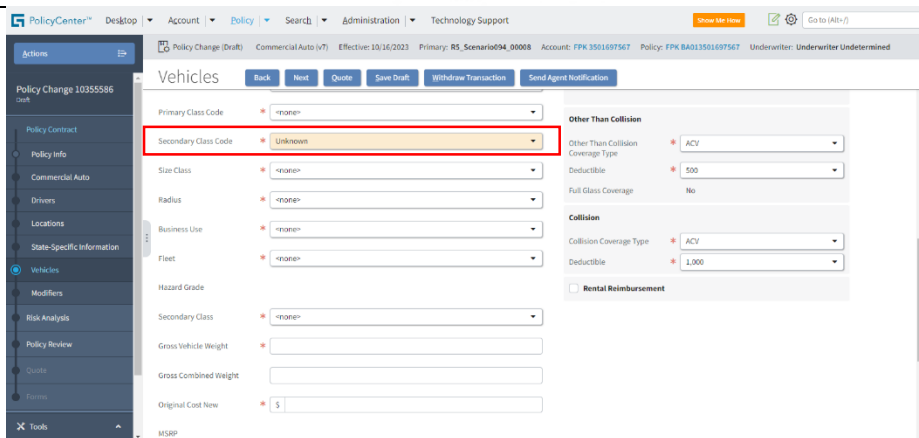
Options for Primary Classification

Size Class (lbs.)		Radius – (Miles)	
• Light Truck	1-10,000 GVW	Local 0-50 miles	Intermediate 51-200
• Medium Truck	10,001-20,000 GVW	Business Use	
• Heavy Truck	20,001 to 45,000 GVW	Service	Farm Default
• Extra Heavy Truck	over 45,001 GVW	Retail	Can use for Farm
• Heavy Truck Tractors	1-45,000 <i>GCW</i>	Commercial	Haul for Hire
• Extra Heavy Truck Tractors	over 45,001 <i>GCW</i>	Fleet	
Trailers		0-4 pulling units	No
• Service or Utility trailer – load capacity 0-2000		5 or more pulling units	Yes
• Trailers - load capacity greater than 2000			
• Semi-Trailer Equipment with truck-tractor 5 th wheel coupling device			

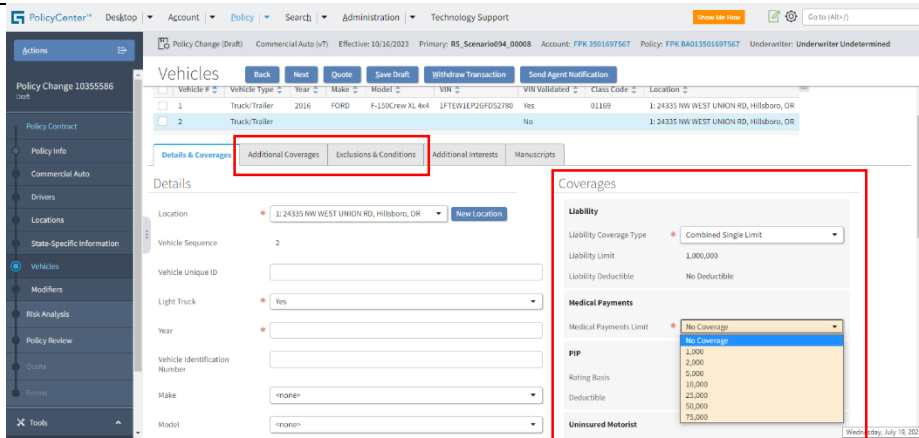
To create or edit a header or footer, go to Insert > Header & Footer

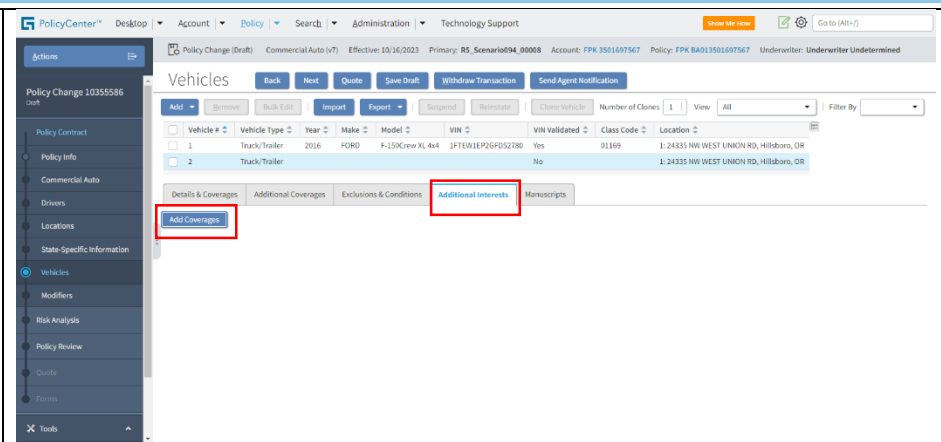
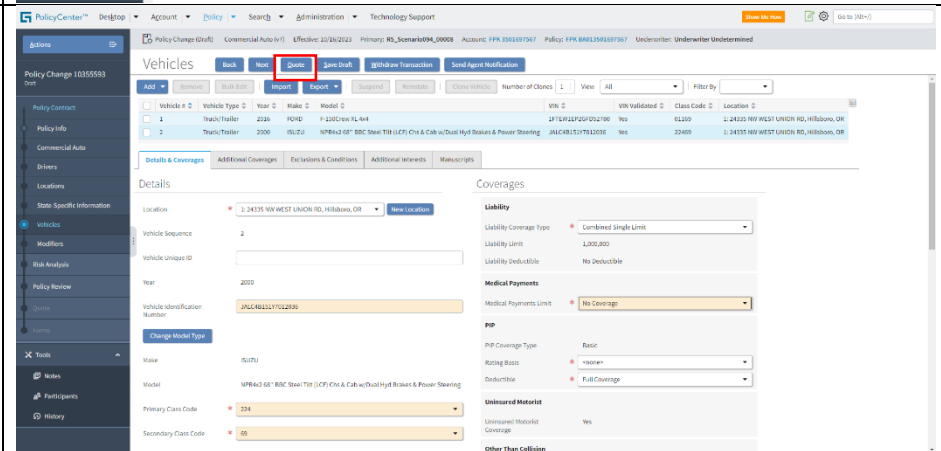
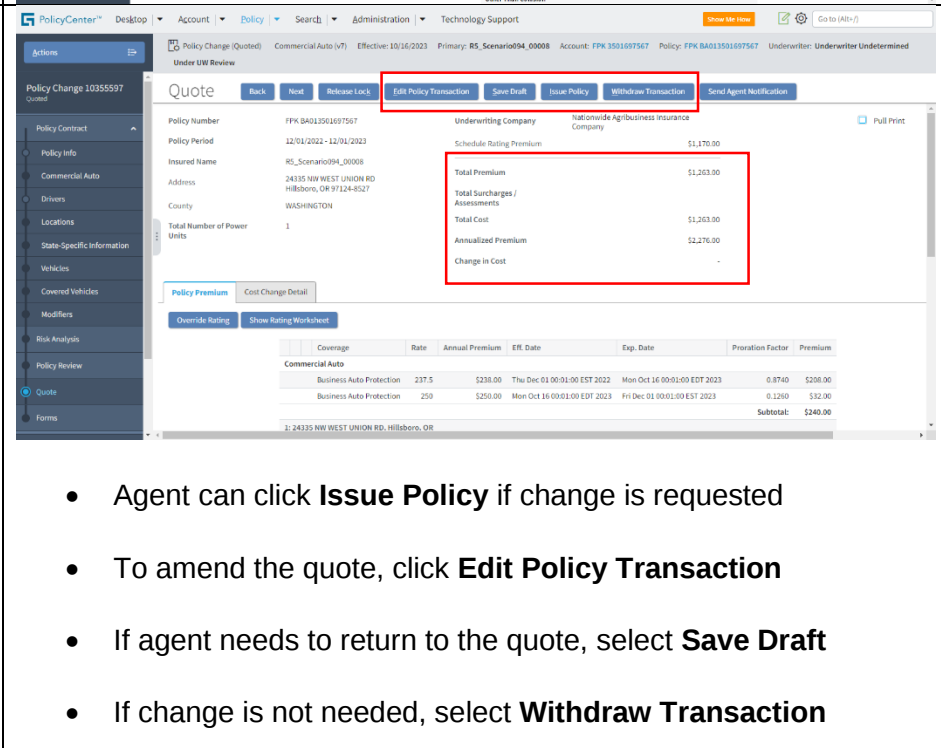
11

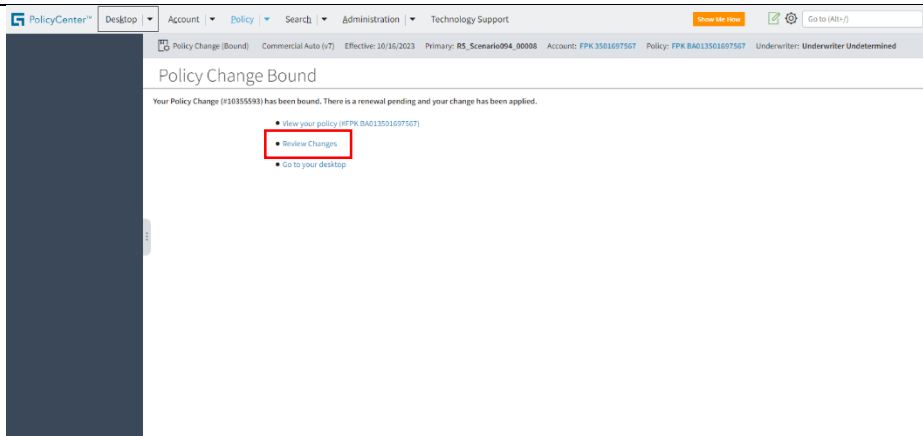
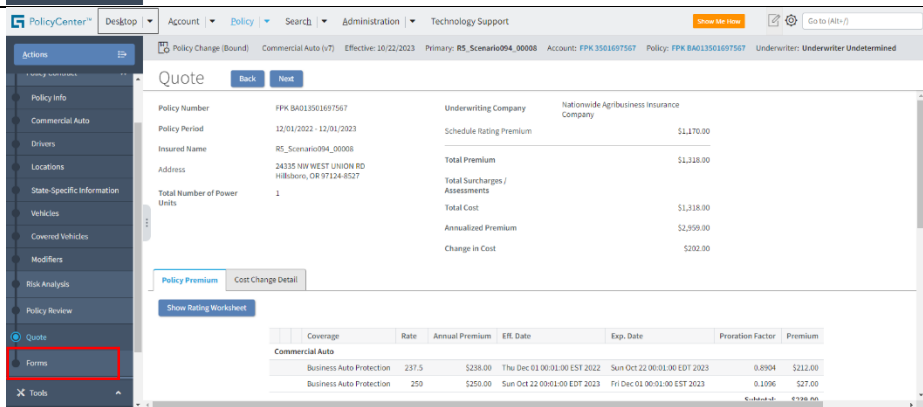
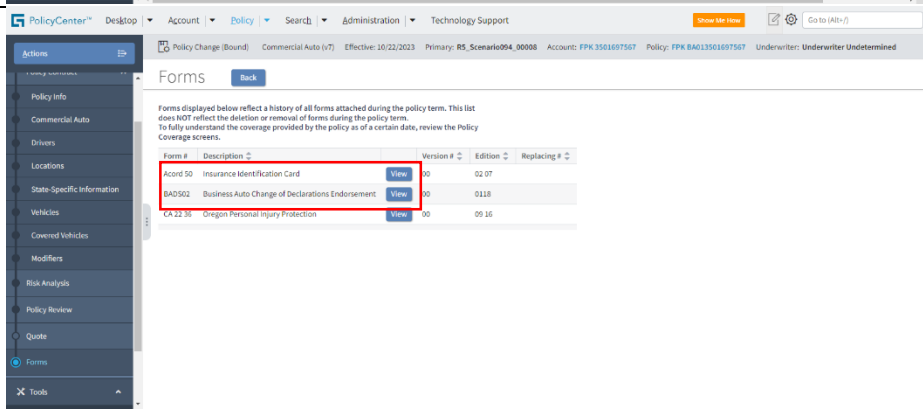
- 9 If **Unknown** was selected for the *Secondary Class Code*, fill in the following fields:
- Secondary Class
 - Telematics Participation (not required)
 - If *Farmers classifications* were selected, complete type of Farm use
 - Based on the information provided above, the *Secondary Classification* will populate



- 10 The coverage selections for Liability and Physical damage for the auto are on the right side of the *Vehicle* page under *Coverages*:
- Policy default coverages will apply
 - Use the dropdowns next to each coverage to amend
 - Review the Additional Coverages and Exclusions & Conditions tabs for optional endorsements

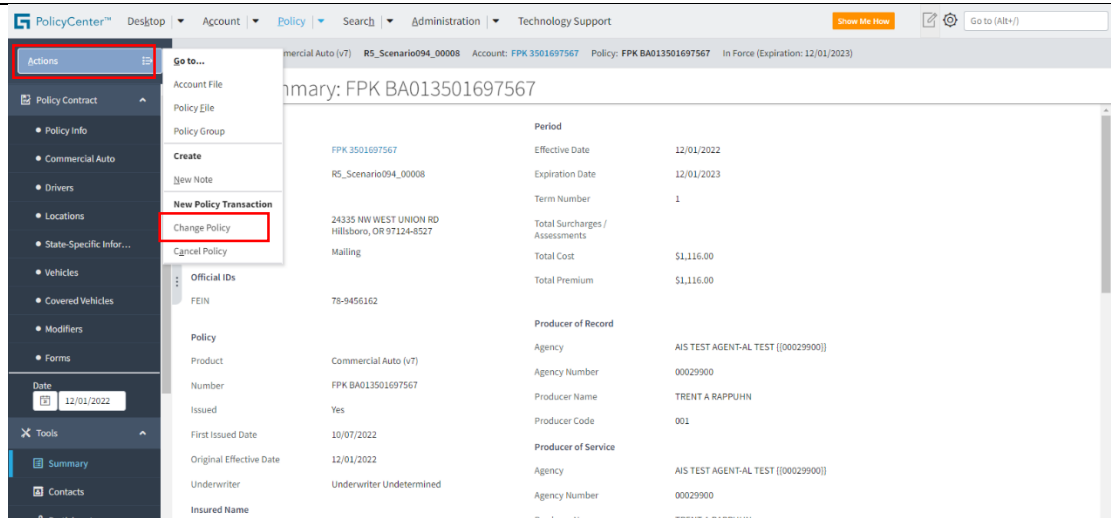
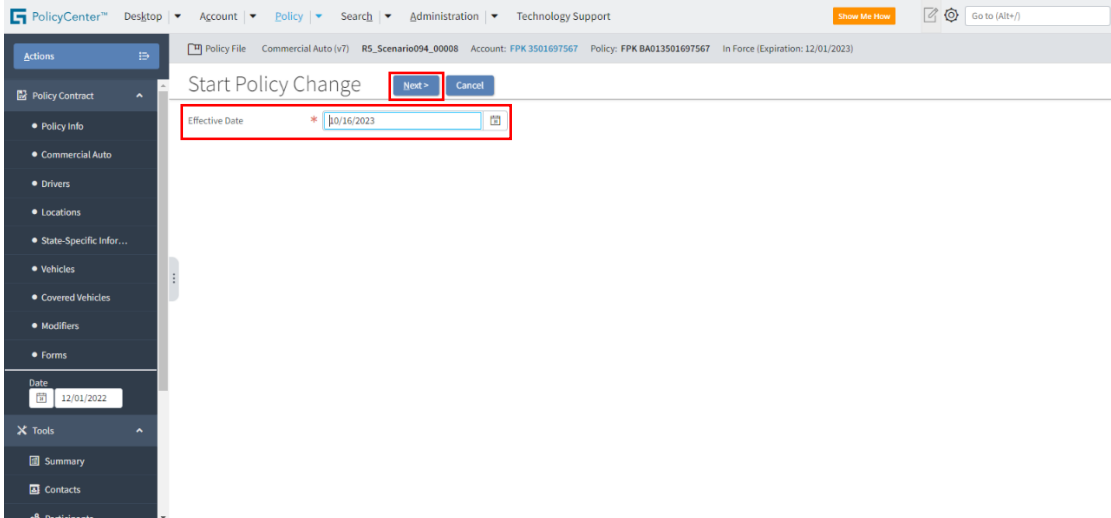
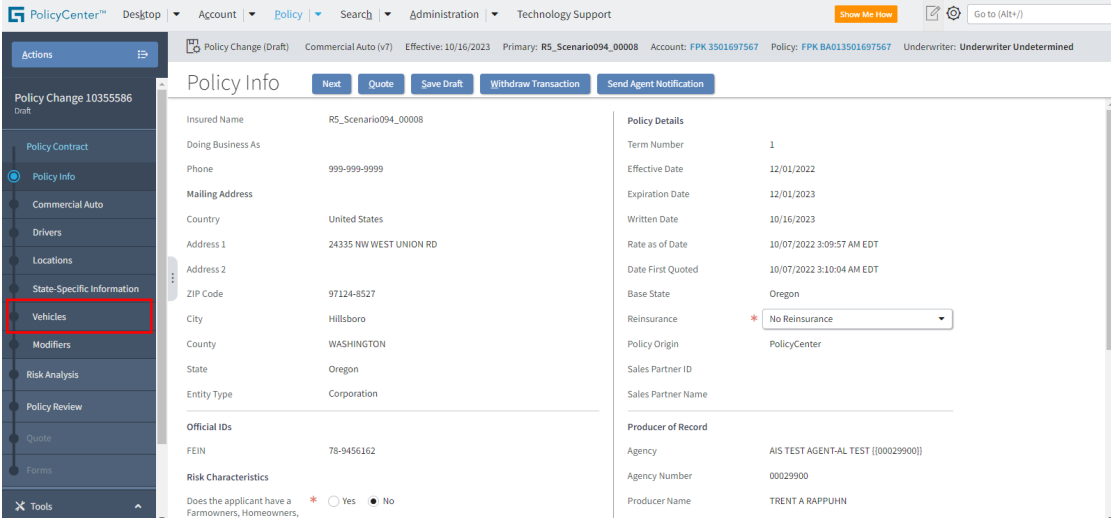


11	If Loss Payee coverages are needed, select the Additional Interest tab and Add Coverage	
12	Once all coverages have been selected, click Quote	
13	Once quoted: - The Total Premium is the full-term premium including the prorated amount for this change. The Total Cost is same as the Total Premium. - 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 <i>*If the quote print(s) are needed, click the Forms link on the left side of the screen. Quotes stay on PolicyCenter for 30 days</i>	 - 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

14	Once issued, the Policy Change Bound screen will populate. Agent can print the POI cards and endorsements next by clicking Review Changes.	 The screenshot shows the 'Policy Change Bound' screen in the PolicyCenter system. The left-hand menu is visible with 'Forms' highlighted. The main content area displays a message: 'Your Policy Change (130355593) 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.BAG13561697567)', 'Review Changes' (highlighted with a red box), and 'Go to your desktop'.																				
15	Select Forms from the left-hand menu	 The screenshot shows the 'Quote' screen in the PolicyCenter system. The left-hand menu is visible with 'Forms' highlighted (indicated by a red box). The main content area displays the 'Quote' details for a Commercial Auto policy, including policy number, insured name, address, and various premium amounts.																				
16	Select View next to the Insurance Identification Card or Business Auto Change of Declarations Endorsement	 The screenshot shows the 'Forms' screen in the PolicyCenter system. The left-hand menu is visible with 'Forms' highlighted. The main content area displays a list of forms attached during the policy term. The 'View' button next to the 'Business Auto Change of Declarations Endorsement' form is highlighted with a red box. <table><tr><th>Form #</th><th>Description</th><th>Version #</th><th>Edition</th><th>Replacing #</th></tr><tr><td>Accord 50</td><td>Insurance Identification Card</td><td>50</td><td>02 07</td><td></td></tr><tr><td>BAD502</td><td>Business Auto Change of Declarations Endorsement</td><td>50</td><td>0118</td><td></td></tr><tr><td>CA 22 35</td><td>Oregon Personal Injury Protection</td><td>50</td><td>09 16</td><td></td></tr></table>	Form #	Description	Version #	Edition	Replacing #	Accord 50	Insurance Identification Card	50	02 07		BAD502	Business Auto Change of Declarations Endorsement	50	0118		CA 22 35	Oregon Personal Injury Protection	50	09 16	
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BAD502	Business Auto Change of Declarations Endorsement	50	0118																			
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Remove a vehicle

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 'Actions' menu is open, and 'Change Policy' is highlighted. The background shows 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'. The 'Next' button is also highlighted.
3	On the <i>Policy Info</i> screen: Click the Vehicles link	 The screenshot shows the 'Policy Info' screen. The 'Vehicles' link is highlighted in the left sidebar. The main content area shows policy details for 'Commercial Auto (v7)' with policy number 'FPK BA013501697567'.

4

Select the check box to the left of the vehicle # 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

Click Issue Policy

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 Undetermined

Actions

Policy Change 10355594 Draft

Policy Contract

Policy Info

Commercial Auto

Drivers

Locations

State-Specific Information

Vehicles

Modifiers

Risk Analysis

Policy Review

Quote

Forms

Tools

Vehicles

Back Next Quote Save Draft Withdraw Transaction Send Agent Notification

Add Remove Bulk Edit Import Export Suspend Reinstate Clone Vehicle Number of Clones 1 View All

Filter By

Vehicle #	Vehicle Type	Year	Make	Model	VIN	VIN Validated	Class Code	Location
1	Truck/Trailer	2016	FORD	F-150Crew XL 4x4	1FTEW1EP2GFD52780	Yes	01169	1: 24335 NW WEST UNION RD, Hillsboro, OR
☒ 2	Truck/Trailer	2000	ISUZU	NPR4x2 68" BBC Steel Tilt (LCF) Chs & Cab w/Dual Hyd Brakes & Power Steering	JALC4B151Y7012036	Yes	22469	1: 24335 NW WEST UNION RD, Hillsboro, OR

Details & Coverages

Additional Coverages Exclusions & Conditions Additional Interests Manuscripts

Details

Location * 1: 24335 NW WEST UNION RD, Hillsboro, OR New Location

Vehicle Sequence 1

Vehicle Unique ID

Year 2016

Vehicle Identification Number 1FTEW1EP2GFD52780

Coverages

Liability

Liability Coverage Type * Combined Single Limit

Liability Limit 1,000,000

Liability Deductible No Deductible

Medical Payments

Medical Payments Limit * No Coverage

PIP

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 Undetermined

Actions

Policy Change 10355594 Draft

Policy Contract

Policy Info

Commercial Auto

Drivers

Locations

State-Specific Information

Vehicles

Modifiers

Risk Analysis

Policy Review

Quote

Forms

Tools

Vehicles

Back Next Quote Save Draft Withdraw Transaction Send Agent Notification

Add Remove Bulk Edit Import Export Suspend Reinstate Clone Vehicle Number of Clones 1 View All

Filter By

Vehicle #	Vehicle Type	Year	Make	Model	VIN	VIN Validated	Class Code	Location
1	Truck/Trailer	2016	FORD	F-150Crew XL 4x4	1FTEW1EP2GFD52780	Yes	01169	1: 24335 NW WEST UNION RD, Hillsboro, OR
☒ 2	Truck/Trailer	2000	ISUZU	NPR4x2 68" BBC Steel Tilt (LCF) Chs & Cab w/Dual Hyd Brakes & Power Steering	JALC4B151Y7012036	Yes	22469	1: 24335 NW WEST UNION RD, Hillsboro, OR

Details & Coverages

Additional Coverages Exclusions & Conditions Additional Interests Manuscripts

Details

Location * 1: 24335 NW WEST UNION RD, Hillsboro, OR New Location

Vehicle Sequence 1

Vehicle Unique ID

Year 2016

Vehicle Identification Number 1FTEW1EP2GFD52780

Coverages

Liability

Liability Coverage Type * Combined Single Limit

Liability Limit 1,000,000

Liability Deductible No Deductible

Medical Payments

Medical Payments Limit * No Coverage

PIP

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 Undetermined

Actions

Policy Change 10355593 Quoted

Policy Contract

Policy Info

Commercial Auto

Drivers

Locations

State-Specific Information

Vehicles

Covered Vehicles

Modifiers

Risk Analysis

Policy Review

Quote

Forms

Tools

Quote

Back Next Release Lock Edit Policy Transaction Save Draft Issue Policy Withdraw Transaction Send Agent Notification

Total Number of Power Units 1 Total Cost \$1,203.00

Annualized Premium \$2,276.00

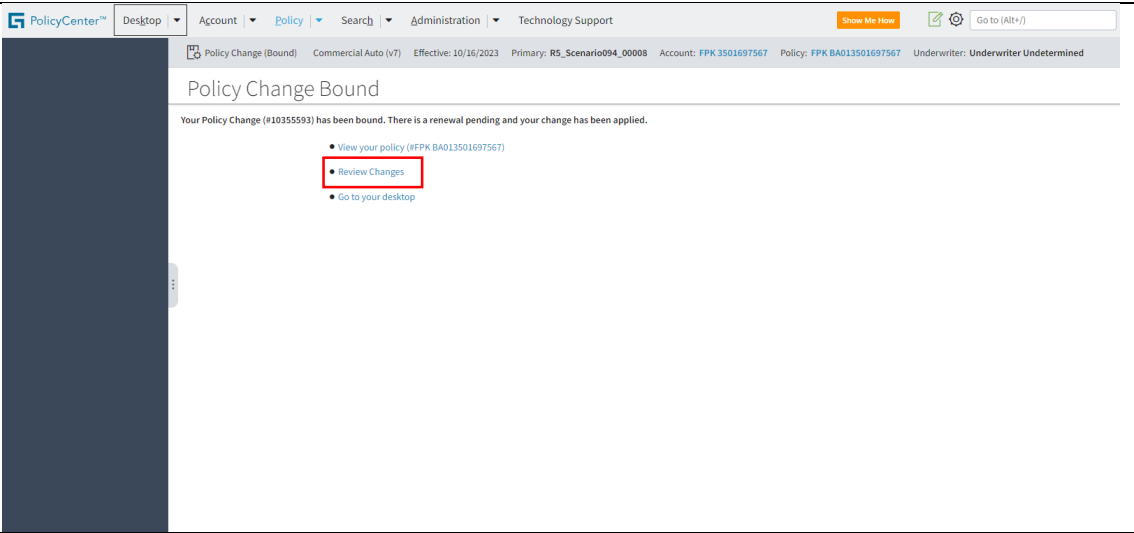
Change in Cost \$147.00

Policy Premium Cost Change Detail

Override Rating Show Rating Worksheet

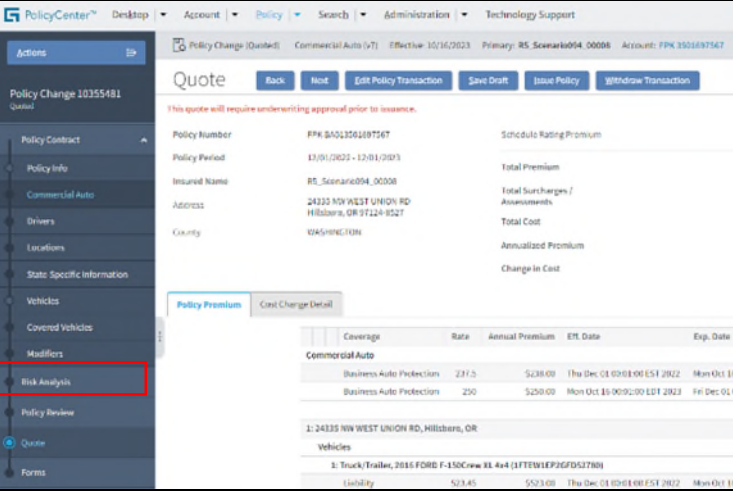
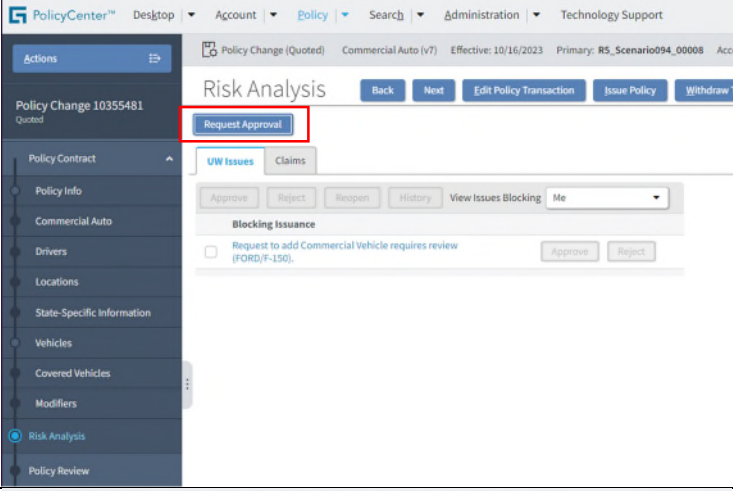
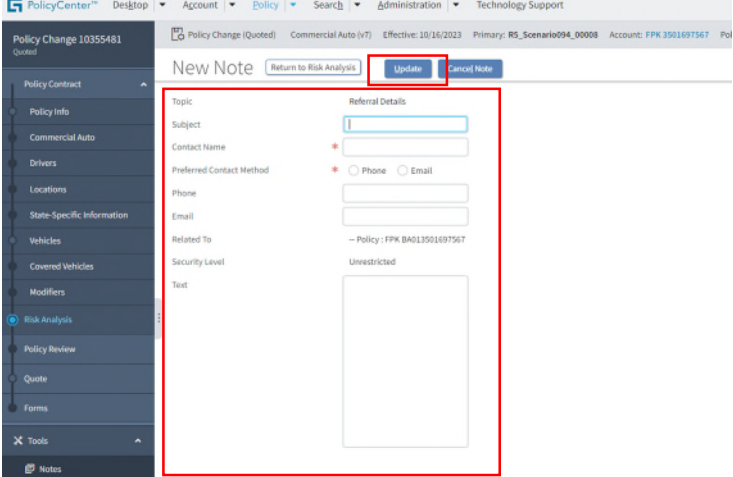
Coverage	Rate	Annual Premium	Eff. Date	Exp. Date	Proration Factor	Premium
Commercial Auto						
Business Auto Protection	237.5	\$238.00	Thu Dec 01 00:01:00 EST 2022	Mon Oct 16 00:01:00 EDT 2023	0.8740	\$208.00
Business Auto Protection	250	\$250.00	Mon Oct 16 00:01:00 EDT 2023	Fri Dec 01 00:01:00 EST 2023	0.1260	\$32.00
						Subtotal: \$240.00
1: 24335 NW WEST UNION RD, Hillsboro, OR						
Vehicles						
1: Truck/Trailer, 2016 FORD F-150Crew XL 4x4 (1FTEW1EP2GFD52780)						
Liability	523.45	\$523.00	Thu Dec 01 00:01:00 EST 2022	Mon Oct 16 00:01:00 EDT 2023	0.8740	\$457.00
Liability	920	\$920.00	Mon Oct 16 00:01:00 EDT 2023	Fri Dec 01 00:01:00 EST 2023	0.1260	\$116.00
PIP	24.7	\$25.00	Thu Dec 01 00:01:00 EST 2022	Mon Oct 16 00:01:00 EDT 2023	0.8740	\$22.00
PIP	25	\$25.00	Mon Oct 16 00:01:00 EDT 2023	Fri Dec 01 00:01:00 EST 2023	0.1260	\$3.00
Uninsured Motorist	94	\$94.00	Thu Dec 01 00:01:00 EST 2022	Fri Dec 01 00:01:00 EST 2023	1.0000	\$94.00

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7	Once issued, the Policy Change Bound screen will populate. Agent can view the endorsement by clicking Review Changes and Forms on the following screen	
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Refer to underwriting

1	If underwriter referral is required, select Risk Analysis	
2	Select Request Approval	
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 <i>Are you sure you want to request approval?</i> • Select OK	

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