

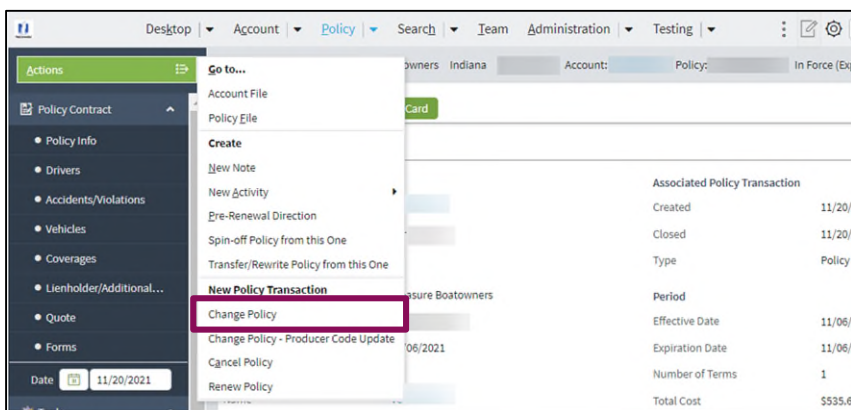
Add, Replace, or Remove a Vehicle to an Existing Pleasure Boatowners PS Policy



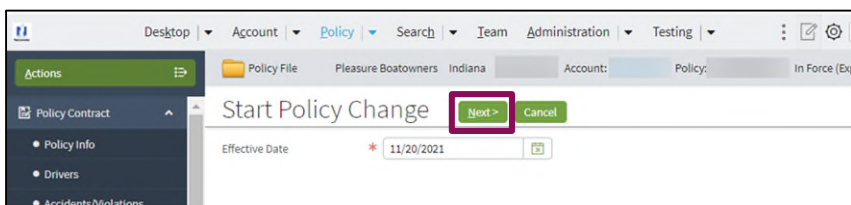
Description

This job aid reviews how to add, replace, or remove a vehicle on an existing Powersports Pleasure Boatowners policy.

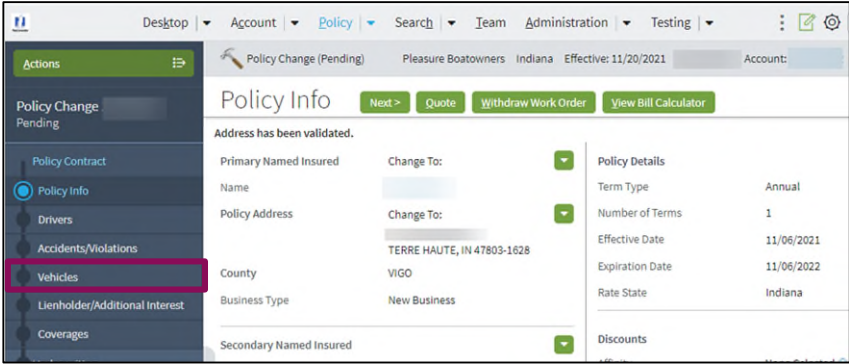
Step 1

Action	Screen
<p>Open an existing Powersports Pleasure Boatowners policy:</p> <ul style="list-style-type: none"> • Select the “Actions button”. • Select “Change Policy” from the drop-down menu. 	 <p>The screenshot shows the 'Policy Contract' screen in the PolicyCenter application. The 'Actions' button is highlighted in the left sidebar. The 'Go to...' dropdown menu is open, showing options like 'Account File', 'Policy File', 'Create', 'New Note', 'New Activity', 'Pre-Renewal Direction', 'Spin-off Policy from this One', 'Transfer/Rewrite Policy from this One', 'New Policy Transaction', 'Change Policy' (highlighted with a red box), 'Change Policy - Producer Code Update', 'Cancel Policy', and 'Renew Policy'. The 'Change Policy' option is the target for this step.</p>

Step 2

Action	Screen
<p>On the “Start Policy Change” screen, the “Effective Date” field defaults to the current date:</p> <ul style="list-style-type: none"> • Enter the appropriate information in the “Effective Date” field. • Select the “Next >” button. 	 <p>The screenshot shows the 'Start Policy Change' screen. The 'Effective Date' field is visible, with a red asterisk indicating it is required. The date '11/20/2021' is entered in the field. The 'Next >' button is highlighted with a red box, indicating it is the next step to click.</p>

Step 3

Action	Screen
<div>On the "Policy Info" screen:</div> <div><ul style="list-style-type: none">Select the "Vehicles" link.</div> <div><div>!</div><div><div>Select the appropriate link below to jump to the next relevant process steps:</div><div><ul style="list-style-type: none">Add a VehicleReplace a VehicleRemove a Vehicle</div></div></div>	

Add a Vehicle

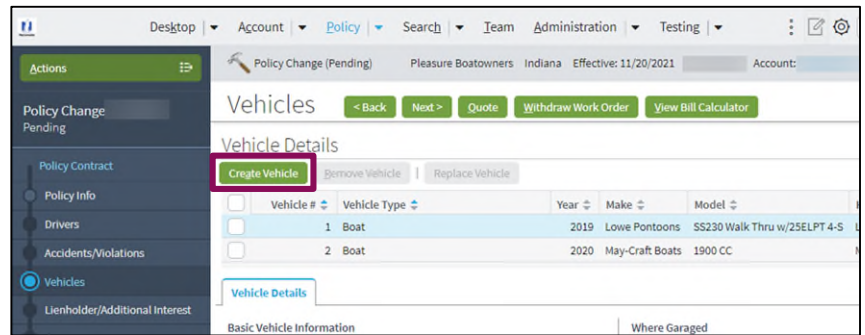
Step 4

Action

On the "Vehicles" screen:

- Select the "Create Vehicle" button.

Screen



Step 5

Action

In the "Basic Vehicle Information" section:

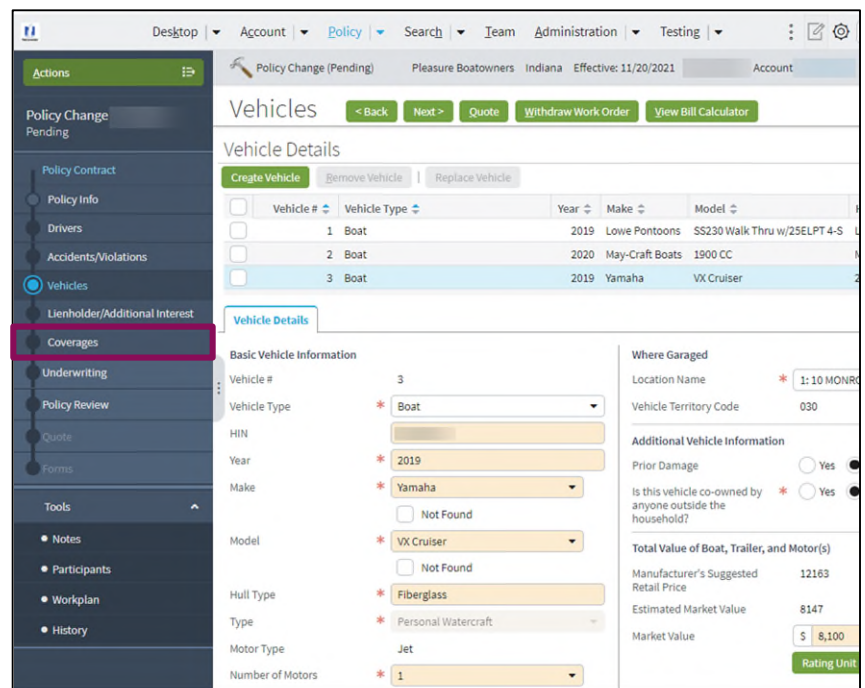
- Complete all required fields. You may need to scroll to view/complete all fields.

- !**

 - VIN look-up services are not available for Powersports Pleasure Boatowners policies. You must manually complete all fields.
- In some cases, an additional screen may display for the entered VIN, requiring you to select a more specific make/model combination via a radio button.
 - Motor information is not required for a personal watercraft. For any other type of pleasure boat, you must select the "Outboard Motor Information Motor #" link in the right column and complete all required fields on the "Motor Details" screen.

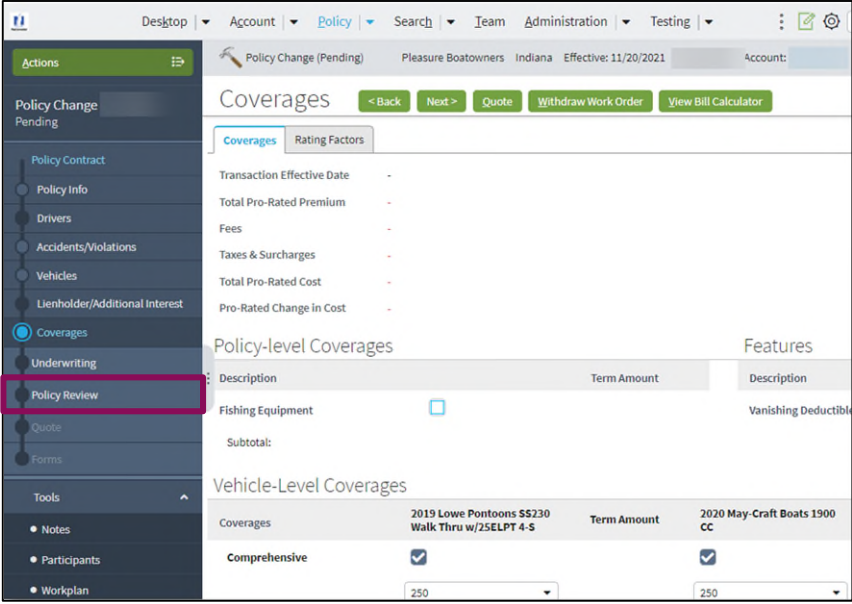
- Select the "Coverages" link.

Screen

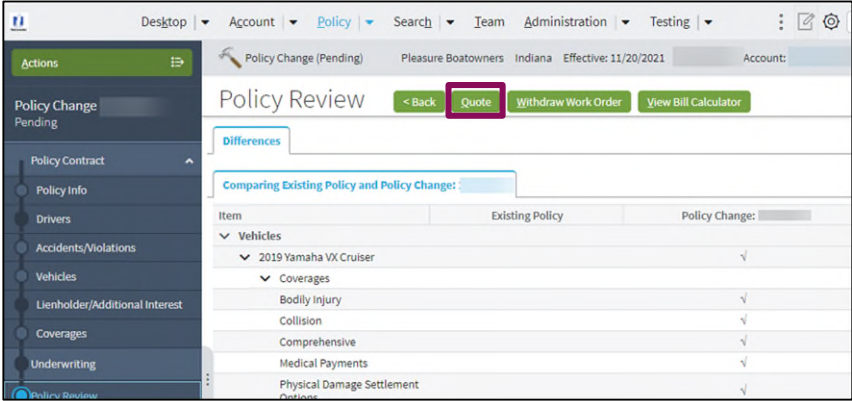


Add a Vehicle, continued

Step 6

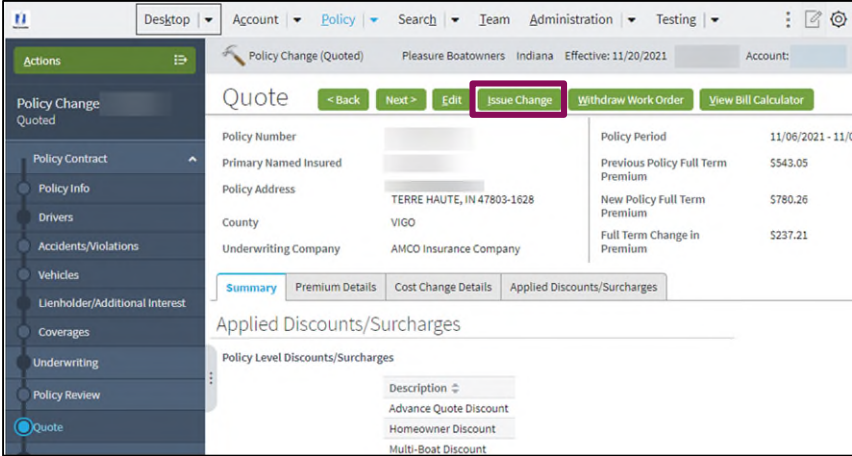
Action	Screen
<p>On the “Coverages” screen:</p> <ul style="list-style-type: none">• Verify all coverages for the added vehicle.• Select the “Policy Review” link.	

Step 7

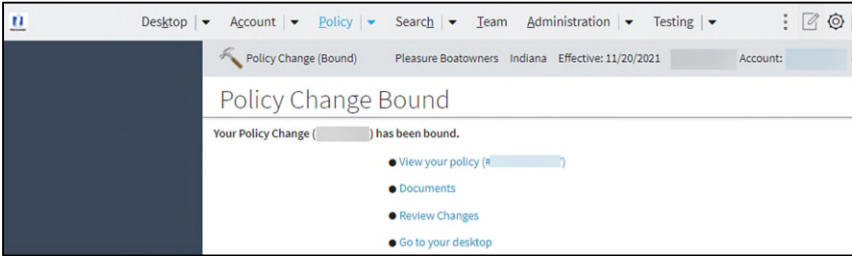
Action	Screen
<p>In the “Policy Review” section:</p> <ul style="list-style-type: none">• Review the coverage changes for the revised policy.• Select the “Quote” button.	

Add a Vehicle, continued

Step 8

Action	Screen
<p>On the “Quote” screen:</p> <ul style="list-style-type: none">Select the “Issue Change” button.Select the “OK” button on the “Issue Change” pop-up window after reviewing the disclosure statement.	

Step 9

Action	Screen
<p>The “Policy Change Bound” screen displays. This indicates the change is bound.</p>	

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Replace a Vehicle

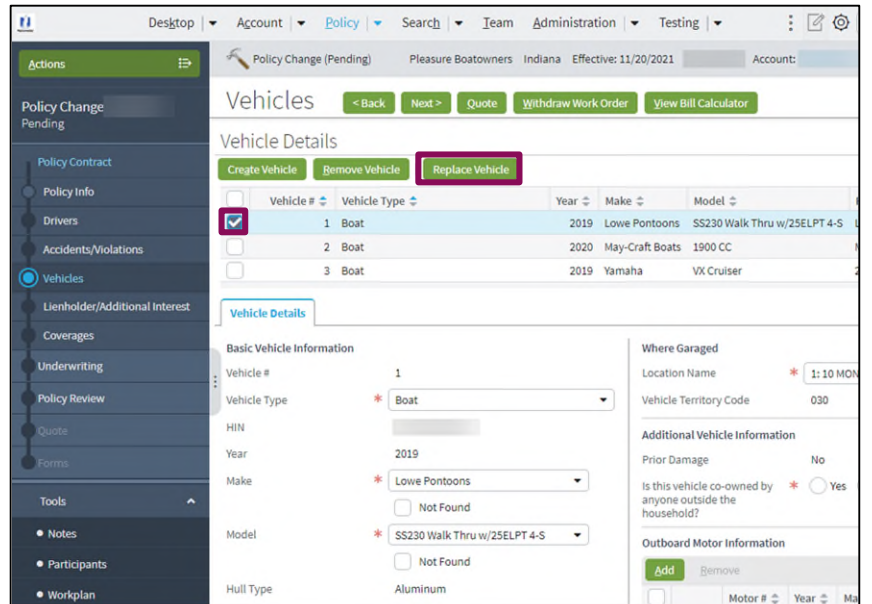
Step 4

Action

On the "Vehicles" screen:

- Select the checkbox to the left of the "Vehicle #" which needs to be replaced.
- Select the "Replace Vehicle" button.

Screen



Desktop | Account | Policy | Search | Team | Administration | Testing | Account: [Name]

Policy Change (Pending) | Pleasure Boatowners | Indiana | Effective: 11/20/2021

Vehicles

< Back | Next > | Quote | Withdraw Work Order | View Bill Calculator

Vehicle Details

Create Vehicle | Remove Vehicle | **Replace Vehicle**

Vehicle #	Vehicle Type	Year	Make	Model
<input checked="" type="checkbox"/> 1	Boat	2019	Lowie Pontoons	SS230 Walk Thru w/25ELPT 4-S
<input type="checkbox"/> 2	Boat	2020	May-Craft Boats	1900 CC
<input type="checkbox"/> 3	Boat	2019	Yamaha	VX Cruiser

Vehicle Details

Basic Vehicle Information

Vehicle # 1

Vehicle Type * Boat

HIN

Year 2019

Make * Lowie Pontoons

Model * SS230 Walk Thru w/25ELPT 4-S

Hull Type Aluminum

Where Garaged

Location Name * 1:10 MON

Vehicle Territory Code 030

Additional Vehicle Information

Prior Damage No

Is this vehicle co-owned by anyone outside the household? * No

Outboard Motor Information

Add Remove

Step 5

Action

In the "Basic Vehicle" Information section:

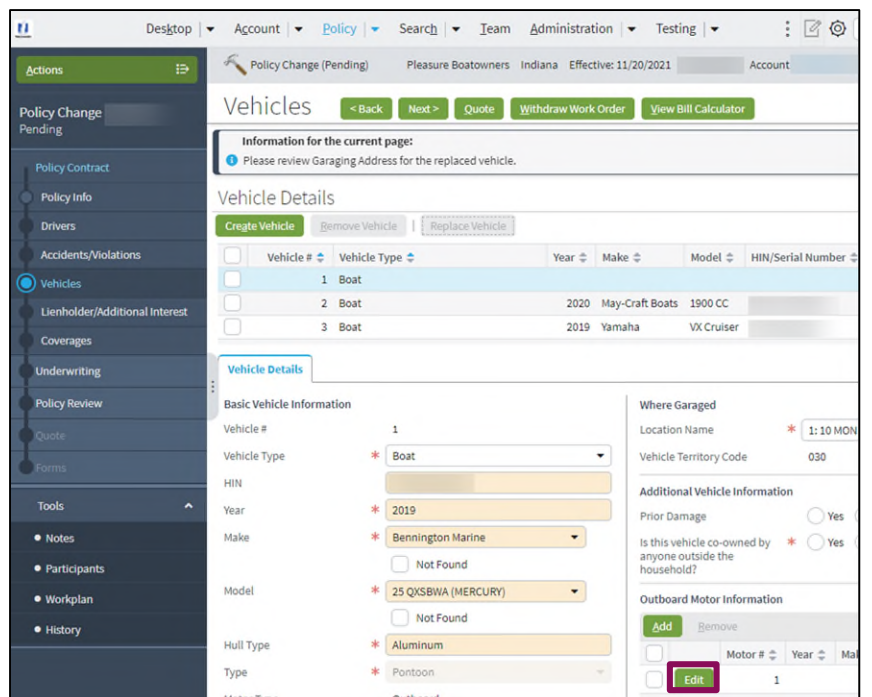
- Complete all required fields. You may need to scroll to view/complete all fields.



- VIN look-up services are not available for Powersports Pleasure Boatowners policies. You must manually complete all fields.
- In some cases, an additional screen may display for the entered VIN, requiring you to select a more specific make/model combination via a radio button.

- Select the "Edit" button in the "Outboard Motor Information" section.

Screen



Desktop | Account | Policy | Search | Team | Administration | Testing | Account: [Name]

Policy Change (Pending) | Pleasure Boatowners | Indiana | Effective: 11/20/2021

Vehicles

< Back | Next > | Quote | Withdraw Work Order | View Bill Calculator

Information for the current page:

Please review Garaging Address for the replaced vehicle.

Vehicle Details

Create Vehicle | Remove Vehicle | Replace Vehicle

Vehicle #	Vehicle Type	Year	Make	Model	HIN/Serial Number
<input type="checkbox"/> 1	Boat	2020	May-Craft Boats	1900 CC	
<input type="checkbox"/> 2	Boat	2019	Yamaha	VX Cruiser	

Vehicle Details

Basic Vehicle Information

Vehicle # 1

Vehicle Type * Boat

HIN

Year * 2019

Make * Bennington Marine

Model * 25 QXSWA (MERCURY)

Hull Type * Aluminum

Type * Pontoon

Where Garaged

Location Name * 1:10 MON

Vehicle Territory Code 030

Additional Vehicle Information

Prior Damage No

Is this vehicle co-owned by anyone outside the household? * No

Outboard Motor Information

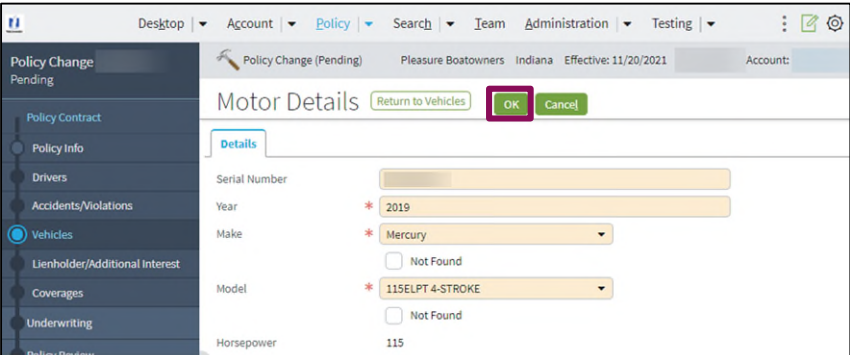
Add Remove

Motor # 1

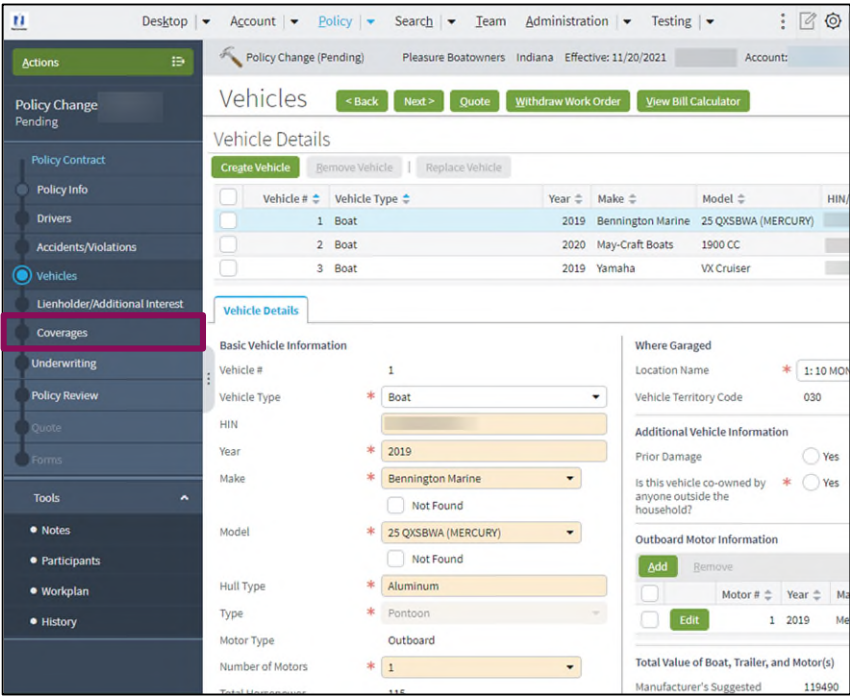
Edit

Replace a Vehicle, continued

Step 6

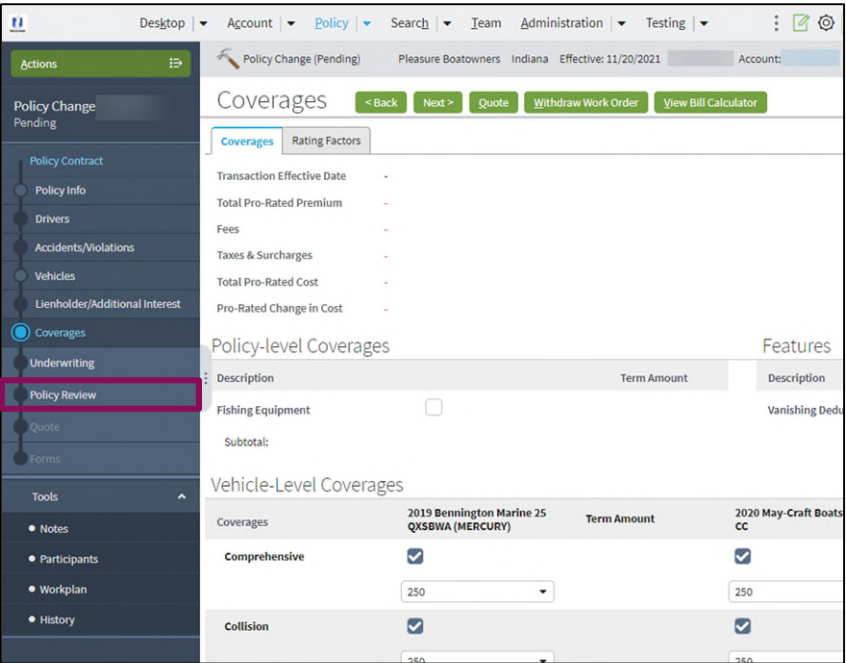
Action	Screen
<p>On the “Motor Details” screen:</p> <ul style="list-style-type: none"> Complete all required fields. Select the “OK” button. 	

Step 7

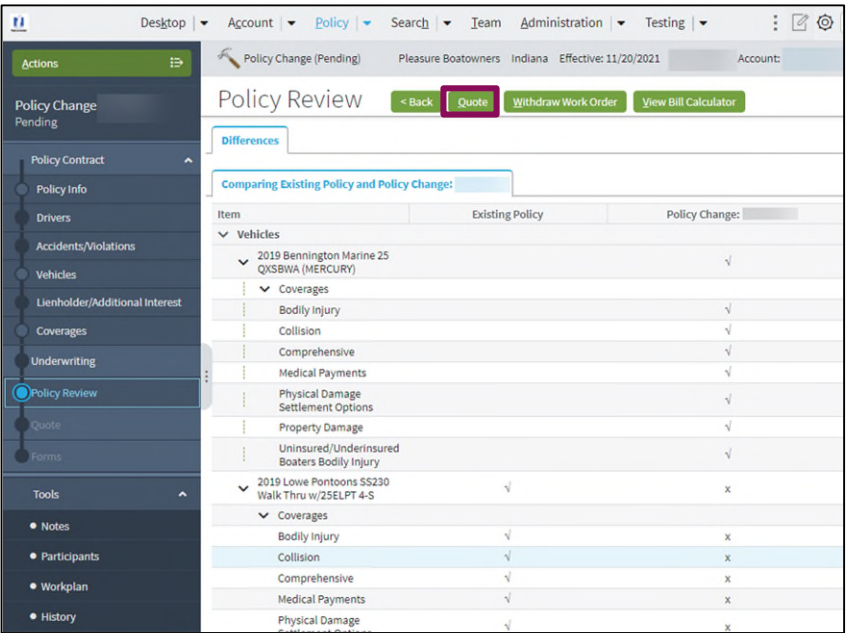
Action	Screen
<p>On the “Vehicles” screen:</p> <ul style="list-style-type: none"> Select the “Coverages” link. 	

Replace a Vehicle, continued

Step 8

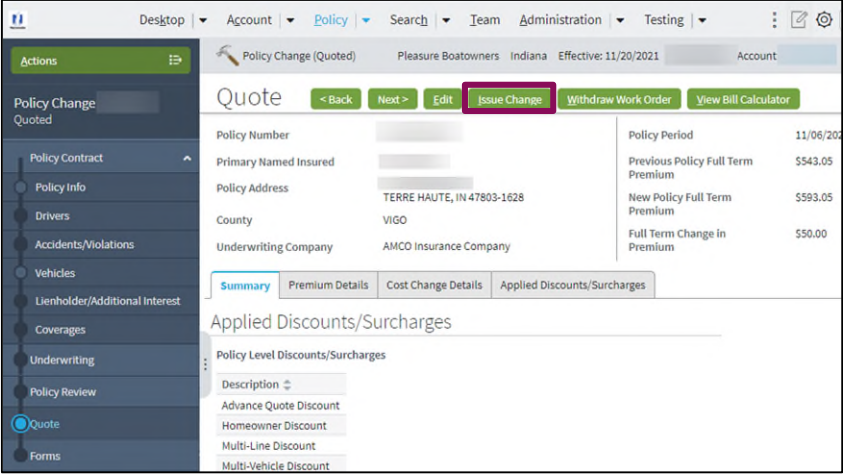
Action	Screen
<p>On the “Coverages” screen:</p> <ul style="list-style-type: none"> Verify all coverages for the added vehicle. Select the “Policy Review” link. 	

Step 9

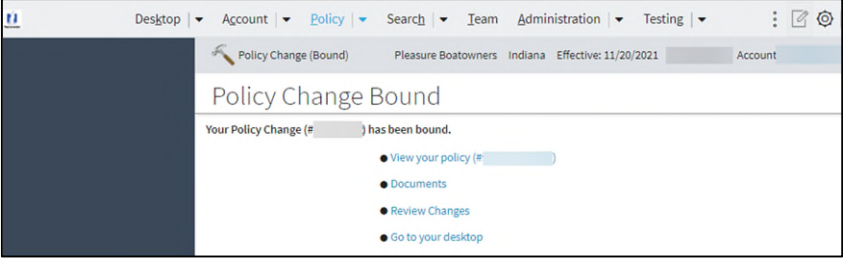
Action	Screen
<p>In the Policy Review section:</p> <ul style="list-style-type: none"> Review the coverage changes for the revised policy. Select the Quote button. 	

Replace a Vehicle, continued

Step 10

Action	Screen
<p>On the “Quote” screen:</p> <ul style="list-style-type: none">• Select the “Issue Change” button.• Select the “OK” button on the “Issue Change” pop-up window after reviewing the disclosure statement.	

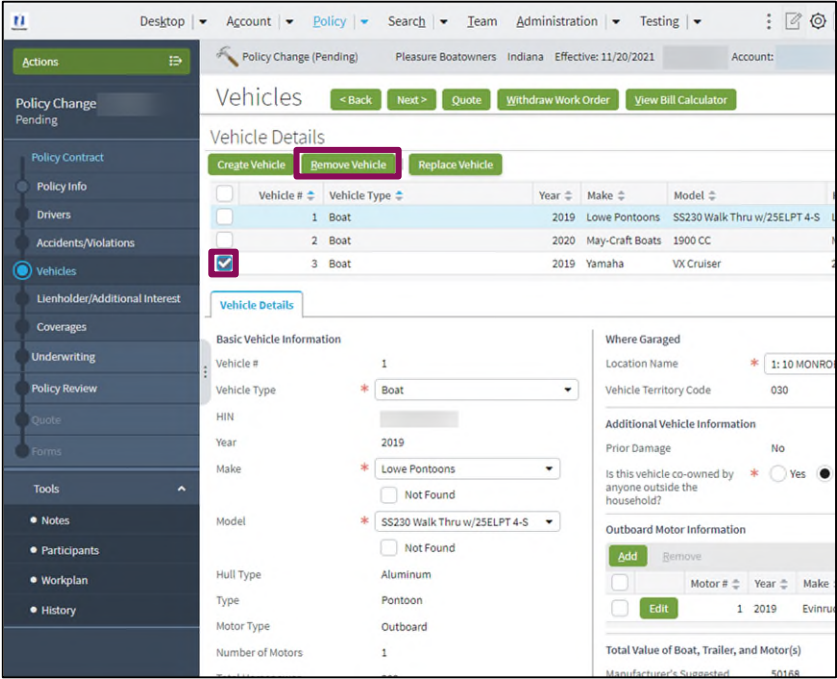
Step 11

Action	Screen
<p>The “Policy Change Bound” screen displays. This indicates the change is bound.</p>	

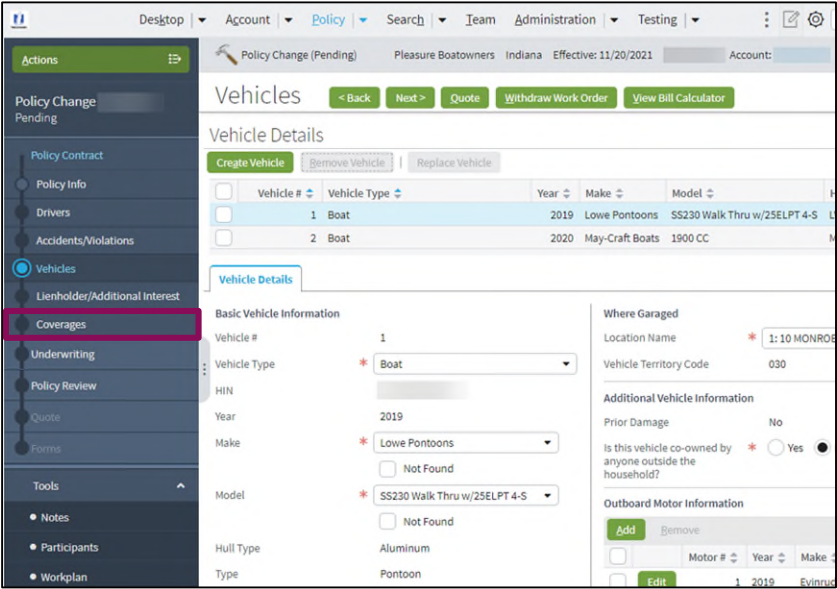
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Remove a Vehicle

Step 4

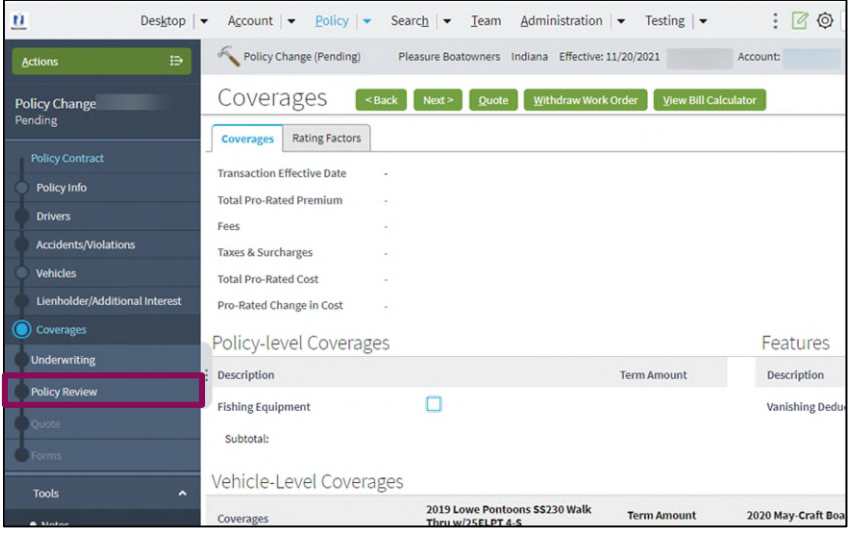
Action	Screen
<p>On the “Vehicles” screen:</p> <ul style="list-style-type: none">Select the checkbox to the left of the “Vehicle #” to be removed.Select the “Remove Vehicle” button.	

Step 5

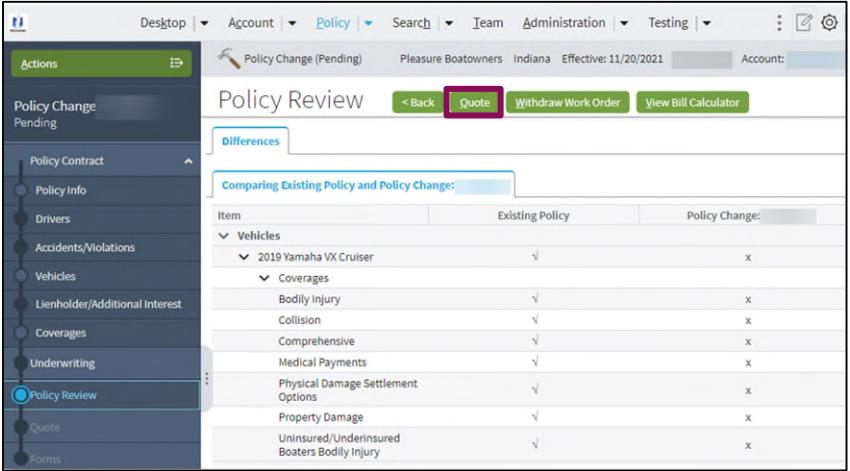
Action	Screen
<p>After removing the vehicle:</p> <ul style="list-style-type: none">Select the “Coverages” link to ensure the coverages have also been removed.	

Remove a Vehicle, continued

Step 6

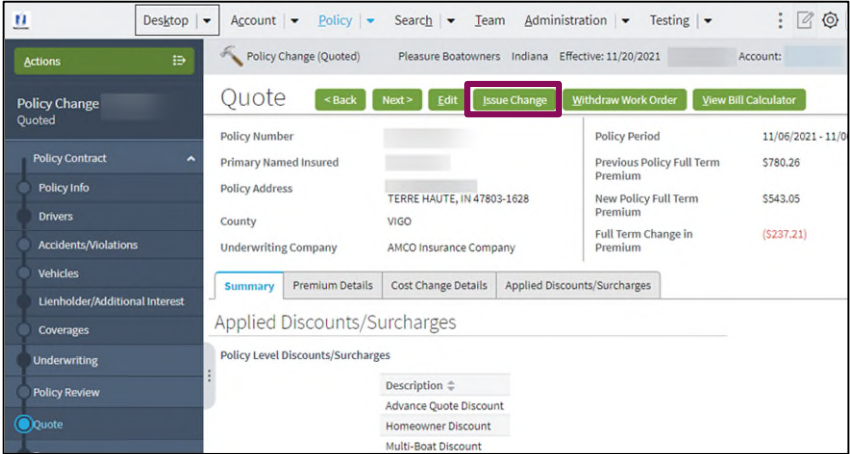
Action	Screen
<p>On the “Coverages” screen:</p> <ul style="list-style-type: none">• Verify all coverages for the vehicle have been removed.• Select the “Policy Review” link.	

Step 7

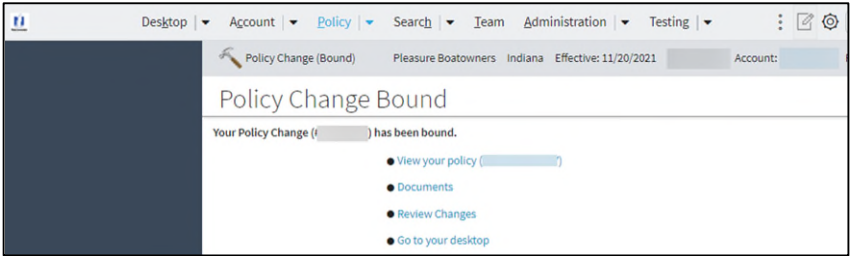
Action	Screen
<p>In the “Policy Review” section:</p> <ul style="list-style-type: none">• Review the coverage changes for the revised policy.• Select the “Quote” button.	

Remove a Vehicle, continued

Step 8

Action	Screen
<p>On the “Quote” screen:</p> <ul style="list-style-type: none">• Select the “Issue Change” button.• Select the “OK” button on the “Issue Change” pop-up window after reviewing the disclosure statement.	

Step 8

Action	Screen
<p>The “Policy Change Bound” screen displays. This indicates the change is bound.</p>	

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