



Amendment - Add a Loss Payee

Purpose

When you need to add a loss payee to an existing Commercial Auto policy.

Helpful Hints

If you wish to complete this scenario without having to create a policy from scratch, please review the *Procedure* section below for more details.

Procedure

Please reference the [VTO User Guide for Associates](#) for more details on how to log in and use the VTO.

You can link to PolicyCenter directly: <https://clpolicycentertraining.nationwide.com/>

For this scenario, you can add a loss payee to a policy in one of two ways:

- Set up an account, create and issue your own policy, then follow the steps below to add a loss payee
 - **(Please refer to: Set-Up an Account in ClearQuoteSM and Create a Quote in ClearQuoteSM scenario cards)**
- You can select and search from the list of Practice Accounts

Practice Accounts			
1.	3501655829	16.	3501655845
2.	3501655830	17.	3501655846
3.	3501655831	18.	3501655849
4.	3501655832	19.	3501655848
5.	3501655833	20.	3501655850
6.	3501655834	21.	3501655851
7.	3501655836	22.	3501655852
8.	3501655835	23.	3501655853
9.	3501655837	24.	3501655854
10.	3501655838	25.	3501655855
11.	3501655839	26.	3501655856
12.	3501655840	27.	3501655857
13.	3501655841	28.	3501655858
14.	3501655844	29.	3501655859
15.	3501655843	30.	3501655861



Amendment - Add a Loss Payee

Scenario Card

Navigate to the policy you wish to add a loss payee to in PolicyCenter. To navigate to the policy, complete the following:

- 1) Click in the **Search** drop-down menu.
- 2) Select **Accounts** from the drop-down menu.

Search Accounts Screen

- 3) Enter the applicable account number in the **Account Number** field.
- 4) Click the **Search** button.
- 5) Click on the **Account Number** to navigate to the Account Summary screen.

Account Summary Screen

- 6) Scroll down and select the **Policy #**

Summary screen:

- 7) Click the **Actions** button.
- 8) Select **Change Policy** from the drop-down menu.

Start Policy Change screen:

- 9) Select an Effective Date after 12/01/2021
- 10) Click the **Next** button to go to the *Policy Info* screen.

Policy Info screen:

- 11) Click on **Vehicles** on the left navigation menu.

Vehicles screen:

- 12) Click on the **Additional Interests** tab.
- 13) Click the **Add Coverages** button.

Search Coverages Screen:

- 14) Select **Loss Payable Clause**
- 15) Click on the **Add Selected Coverages** button.

Vehicles screen:

- 16) Under the **List of Scheduled Items**, click the **Add** drop-down menu and select the type of entity being added. Select **New Individual** for this example.

New Loss Payee screen:

- 17) Enter the **Loan Number**. (e.g. 123456)
- 18) Enter the **Name** fields. (e.g. John Smith)
- 19) Enter the **Address 1** field (e.g. PO Box 919010)
- 20) Enter the **Zip Code** field. (e.g. 50391)
- 21) Enter the **City** field (e.g. Des Moines)
- 22) Select a state from the **State** drop-down menu. (e.g. Iowa)
- 23) Click the **Ok** button.

Vehicles screen:

- 24) Click on **Quote**.



Amendment - Add a Loss Payee

Quote screen:

25) Click **Issue Policy**.

26) Click **OK**.