

# Add a Third-Party Designee to a Policy

## PolicyCenter



### Description:

This job aid details the step to add a Third-Party Designee (Caretaker) to a policy in PolicyCenter.

**NOTE:** Adding a Third-Party Designee is only available in CA, CT, NJ, and NY.

### Step 1

#### Action

On the *Policy Info* screen:

- Select the checkbox to the right of the **Third-Party Designee (Caretaker)** field.

#### Screen

The screenshot shows the 'Policy Info' screen in PolicyCenter. The left sidebar contains a list of actions: Policy Contract, Policy Info (selected), Drivers, Accidents/Violations, Vehicles, Driver Assignment, Usage-Based Insurance, Coverages, Lienholder/Additional Interest, Underwriting, Quote, and Payment. The main content area shows the 'Policy Info' form. The 'Secondary Named Insured' section is expanded, and the 'Third Party Designee (Caretaker)' checkbox is highlighted with a green box. The form includes fields for Name, Phone, Policy Address, County, Business Type, and Is policy taken from Assigned Risk Plan?.

### Step 2

#### Action

A new section on the *Policy Info* screen displays.

- Complete all required information, including:
  - First Name**
  - Last Name**

#### Screen

The screenshot shows the 'Policy Info' screen in PolicyCenter. The 'Secondary Named Insured' section is expanded, and the 'Third Party Designee (Caretaker)' checkbox is checked. The form includes fields for Prefix, First Name, Middle Name, Last Name, Suffix, and Address. The 'First Name' field is highlighted with a green box.

### Job Aid Process (Cont.) :

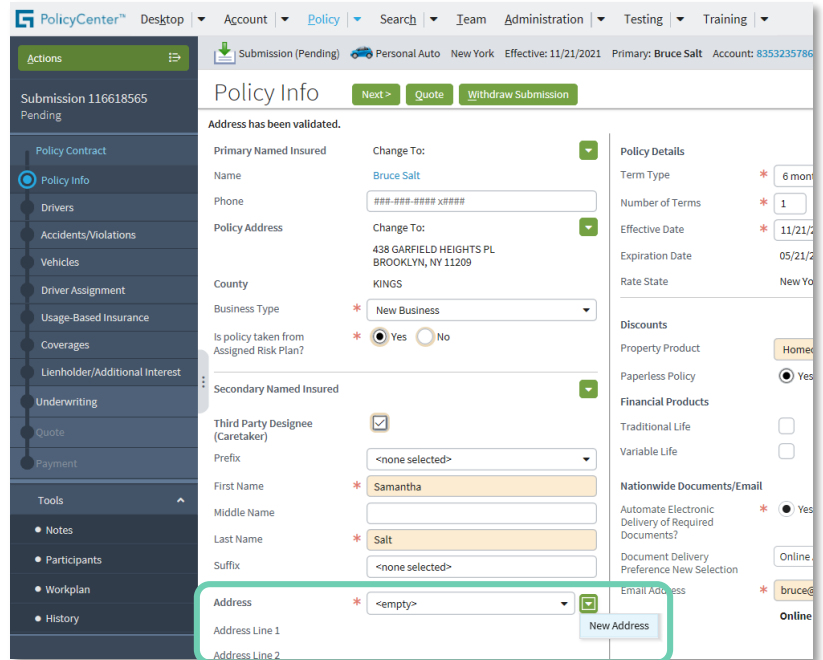
#### Step 3

#### Action

To complete the address fields:

- Click the arrow to the right of the **Address** field.
- Select **New Address** from the drop-down list.

#### Screen



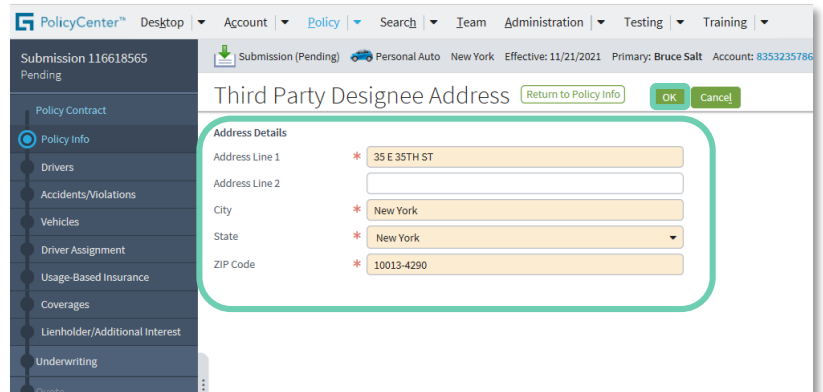
#### Step 4

#### Action

The *Third-Party Designee Address* screen displays.

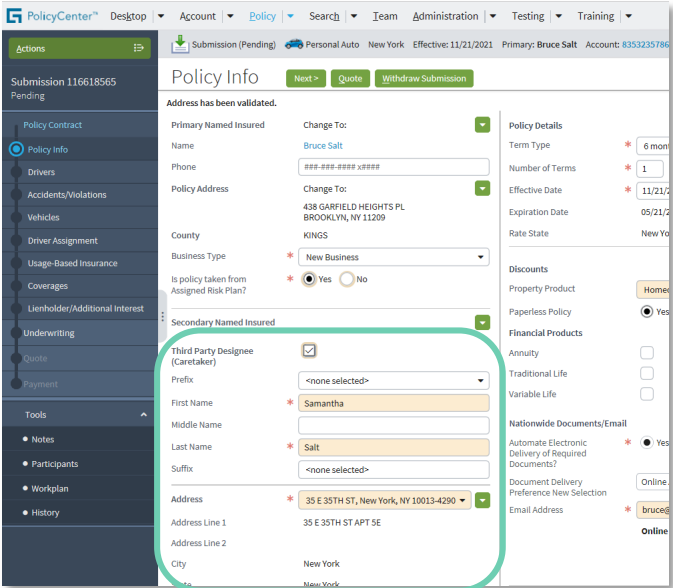
- Complete all required address fields.
- Click the **OK** button.

#### Screen



## Job Aid Process (Cont.) :

### Step 5

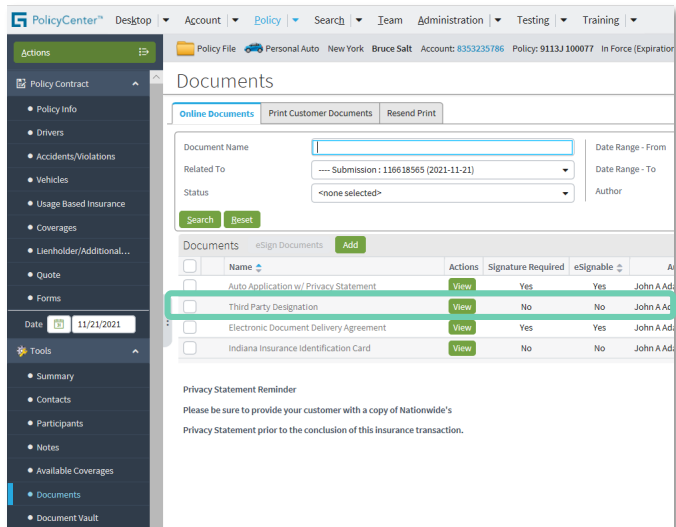
Action	Screen
<p>You have successfully added a Third-Party Designee (Caretaker).</p> <p>You may now complete the policy set-up.</p>	

### Step 6

## Action

## Screen

Once the policy is bound and payment submitted, you can process a *Third-Party Designation* trailing document.



The screenshot displays the PolicyCenter interface. On the left is a dark sidebar with a navigation menu. The main content area is titled 'Documents' and contains a search form and a table of document types.

**PolicyCenter** Desktop | Account | Policy | Search | Team | Administration | Testing | Training

Policy File | Personal Auto | New York | Bruce Salt | Account: 8353235786 | Policy: 9113J 100077 | In Force (Expiration)

### Documents

Online Documents | Print Customer Documents | Resend Print

Document Name:

Related To: --- Submission: 116618565 (2021-11-21)

Status: <none selected>

Documents		eSign Documents	Add		
<input type="checkbox"/>	Name	Actions	Signature Required	eSignable	Author
<input type="checkbox"/>	Auto Application w/ Privacy Statement	<input type="button" value="View"/>	Yes	Yes	John A. Ad
<input type="checkbox"/>	Third Party Designation	<input type="button" value="View"/>	No	No	John A. Ad
<input type="checkbox"/>	Electronic Document Delivery Agreement	<input type="button" value="View"/>	Yes	Yes	John A. Ad
<input type="checkbox"/>	Indiana Insurance Identification Card	<input type="button" value="View"/>	No	No	John A. Ad

**Privacy Statement Reminder**

Please be sure to provide your customer with a copy of Nationwide's Privacy Statement prior to the conclusion of this insurance transaction.

**Sidebar Menu:**

- Actions
- Policy Contract
  - Policy Info
  - Drivers
  - Accidents/Violations
  - Vehicles
  - Usage Based Insurance
  - Coverages
  - Lienholder/Additional...
  - Quote
  - Forms
- Date: 11/21/2021
- Tools
  - Summary
  - Contacts
  - Participants
  - Notes
  - Available Coverages
  - Documents
  - Document Vault

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