

## Add a Driver to a PowerSports Boat Policy

### In Brief

In this Quick Card, a policyholder has requested to add a driver to her PowerSports Pleasure Boatowners policy.

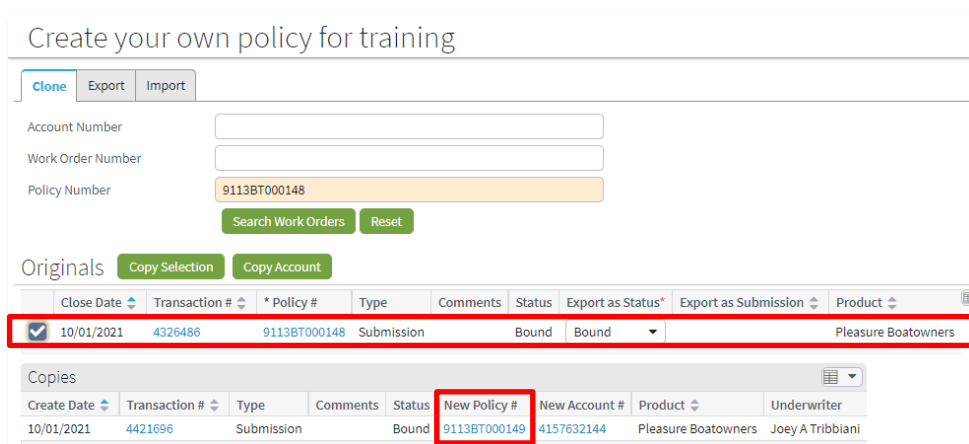
Log in to the [VTO](#) using the appropriate generic user account from the [VTO Information Guide](#) document.

### 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 **"9113BT000148"** 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 #**4326486**.



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 a Driver

### 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 **Next >** button.

### Drivers screen

13. Review the *Driver Details* section information.
14. Click the **Add** button.
15. Select “**New Person**” from the drop-down list.
16. On the **Contact Detail** tab, enter the information:
  - Enter “**Lily**” in the **First Name** field.
  - Enter “**Salt**” in the **Last Name** field.
  - Ensure “**Driver**” is selected in the **Driver Type** field.
  - Enter “**09302002**” in the **Date of Birth** field.
  - Select “**Single**” from the **Marital Status** drop-down list.
  - Select “**Female**” from the **Gender** drop-down list.
  - Enter “**666412563**” in the **SSN** field.

**IMPORTANT:** This is a test environment. The SSN is ONLY required for the VTO.

- Select “**Child**” from the **Relationship to Insured** drop-down list.
- Enter “**5**” in the **Years of Boating Experience** field.
- Enter “**8760401499**” in the **License #** field.

**NOTE:** Review the *Driver Details* section information. Notice the additional driver has been added to the policy.

17. 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.



*Quote screen*

18. Click the **Issue Change** button.
19. Click the **OK** button.

*Policy Change Bound screen*

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