

Description

This job aid reviews how to add, replace, or remove an outboard motor to an existing PowerSports Pleasure Boatowners policy.

Note: There are different procedures for replacing the original motor and replacing an additional motor.

All pleasure boats must have a pre-set number of engines assigned to the policy (as prescribed by the VIN. In this example, the boat must have one engine defined in the policy. You MUST have the exact number of engines specified by the VIN or PolicyCenter will not allow you to proceed with the policy submission or change.

In the example of replacing the primary motor, you must first add the new motor and then remove the primary motor to fulfill the requirement of the exact number of engines. The steps are listed first on this job aid.

Suppose the customer has additional engines they occasionally use with the boat. In that case, you must follow the procedures under the Add an Additional Motor, Replace an Additional Motor, or Remove an Additional Motor.

For example, the client has a single outboard boat, but they utilize a second motor they sometimes swap out and use on the same boat. In that case, use the Add Motor procedure below (and the corresponding Remove procedure to delete the separate motor from the policy. This additional motor is added and rated as if it is a vehicle.

Vehi	cle Details		
Basic	Vehicle Info	rmation	
Vehic	le #		1
Vehic	le Type	*	Boat 💌
HIN			BUJ54597G920
Year			2020
Make		*	May-Craft Boats 🔹
			Not Found
Mode	l	*	1900 CC 🔹
			Not Found
Hull 1	уре		Fiberglass
Туре			Fishing
Moto	r Type		Outboard
Num	per of Motors		1

Slep I				
Action	Screen			
Begin by locating the policy and initiating a policy change.	Desktop Account Policy Search Ieam Testing Training Training			
Navigate to the "Vehicles" screen.	Policy Change i Pending Vehicle Details Folicy Contract Create Vehicle Policy Info Wehicle # \$ Vehicle Type \$ Vear \$ Make \$ Model \$ HIN/Serial Number \$ 0 nivers 1 Boat 2020 May-Craft Boats 10 Vehicle # \$ Vehicle Type \$ 100 CC			
	Vehicle Vehicle betalls Lienholde/Additional Interest Basic Vehicle Information Vehicle # 1 Where Garaged Location Name * 1:1: Vehicle Type Underwriting HN Policy Review Hin Vehicle Type Boat Where Garaged Additional Vehicle Information Vehicle Type Make Where Garaged No Information Vehicle Territory Code Vehicle Territory Code 010 Additional Vehicle Information Vehicle Territory Code Vehice Territory Code No Information Vehicle Territory Code Vehice Territory Code 010 Additional Vehicle Information Vehice Territory Code Vehice Territory Code No Information Vehice Territory Code Vehice Territory Code No Information Vehice Territory Code Vehice Territory Code No Information Vehice Territory Code Information Vehice Territory Code Vehice Territory Code No Information Vehice Territory Code Vehice Territory Code No Information Vehice Territory Code Vehice Territory Code No Information Veh			



Select the appropriate link from the list below to continue with the policy change.

- o <u>Replace the Primary Motor</u>
- o Add an Additional Motor
- o <u>Replace an Additional Motor</u>
- o <u>Remove an Additional Motor</u>

Replace a Primary Motor

Step 2

Action	Screen			
On the "Vehicles" screen: Select the "Add" button in the "Outboard Motor Information" section of the existing boat.	Desktop < Account < Bolicy < Search < Team Administration < Testing < Training < Live C Actions IP Policy Change Pelicy Change (Pending) Pelicy Change Vehicle S Policy Change Vehicle Details Policy Info Create Vehicle Policy Info Vehicle Stype \$ Policy Info Vehicle Type \$ Policy Info Desktop \$ Po			
	Accdents/Molations Vehicle Details Vehicles Bask Vehicle Information Vehicle Type Boat Vehicle Type Boat Vehicle Type Boat Vehicle Territory Code 010 Additional Vehicle Information Vehicle Territory Code 010 Vehicle Territory Code 010 Vehicle Territory Code 010 Additional Vehicle Information Vehicle Territory Code 010 Vehicle Territory Code 010 Male May-Craft Boats Prior Damage No Boat Not Found No No No Nodel 1 1000 CC Outboard Outboard Outboard Vehicle Type Fiberglass Type Fibring Motor #\$ Year \$ Make \$ Vehicle Type Fiberglass 1 2020 Honda Mar Total Value of Boat, Trailer, and Motor(s) Vehicle Type 1 No Total Value of Boat, Trailer, and Motor(s) Manufacturer's Supported 28601 28601			

Action	Screen			
In the "Outboard Motor Information" section:	Desktop Account Policy Search Team Administration Testing Training Li Actions Policy Change (Pending) Pleasure Boatowners Indiana Effective: 11/17/2021 Effective: 11/17/202			
Select the "Edit" button for the newly added motor.	Policy Change Vehicles <back next=""> Quote Withdraw Work Order View Bill Calculator Pending</back>			
	Policy Contract Create Vehicle Replace Vehicle Policy Unifo Vehicle # 2 Vehicle Type # Year # Make # Model # HIN/Serial Numb			
	Drivers 1 Boat 2020 May-Craft Boats 1900 CC BUJ54597G920 Accidents/Wolations Vehicle Details			
	Vehicles Lienholder/Additional Interest Basic Vehicle Information Vehicle # 1 Location Name * 1:1900 E 107 Coverages			
	Underwriting Wehicle Type * Boat Vehicle Territory Code 010 HIN BUJ545976920 Additional Vehicle Information Vehicle Territory Code 010 Year 2020 Prior Damage No			
	Quote Make * May-Craft Boats Is this vehicle co-owned by * Yes Yes Forms Not Found household?			
	Tools Model * 1900 CC Outboard Motor Information • Notes Hull Type Fiberglass Genove			
	Participants Type Fishing Motor # Vear Make Edit 1 2020 Honda Motor Type Outboard Edit 2			
	History Number of Motors			



Step 4				
Action	Screen			
On the "Motor Details" screen:	D Designer Account Pelley Search I man Administration I Training I Live C D Search Search Search Search I Search <t< th=""></t<>			
Complete all required fields.	Pending Contract.			
Select the "OK" button	Policy Info Petalls Drivers Serial Number 2222			
	Accidents/Violations Vear * 2020 Violations Make * Evinnude Violations Make Violations			
	Coverages Model * AISGHL115 HP ETEC DI • Underwritine i Disfound			
	Horsepower 115			

Step 5

Action	Screen		
In the "Outboard Motor Information" section:	Desktop Account Policy	y ▼ Searc <u>h</u> ▼ Ieam Administra ing) Pleasure Boatowners Indiana Effe	ation ♥ Testing ♥ Training ♥ Live C
Select the original motor by selecting the checkbox to the	olicy Change ending Vehicle Details	< Back Next > Quote Withdraw Woo	k Order 🛛 🗹 Ew Bill Calculator
Select the "Remove" button.	Policy Info Policy	re Vehicle Replace Vehicle hicle Type \$ Year \$ at 2020	Make \$ Model \$ HIN/Serial Number \$ May-Craft Boats 1900 CC BUJ54597G920
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	Underwirting HIN Policy Review Year Quote Make	2020 May-Craft Boats Not Found	Additional Vehicle Information Prior Damage No Is this vehicle co-owned by * Yes No anyone outside the
	Tools Model • Notes Hull Type	* 1900 CC Not Found Fiberglass	nousehold/ Outboard Motor Information Add Remove Motor # \$ Year \$ Make \$
	Participants Type Workplan Motor Type History Number of Motors Type	Fishing Outboard 1	Edit 1 2020 Honda Mar Edit 2 2020 Evinrude

Action	Screen			
On the "Vehicles" screen:	11 Desgtop • Agcount • Policy • Search • Ieam Administration • Testing • Training • Live C Actions (3) (5) Policy Change (Pending) Pleasure Boatowners Indiana Effective: 11/17/28.			
Select the "Quote" button.	Policy Change Pending Vehicle Details Policy Contract Policy Info Drivers Accdents/Velations			
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	Workplan MotorType Outboard Workplan Number of Motors 1 Total Value of Boat, Trailer, and Motor(s) Workplan Number of Motors 1 Manufacturer's Supported 15988			



Step 7				
Action	Screen			
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Select the "Issue Change" button. Select the "OK" button on the Issue Change pop-up window after reviewing the disclosure statement.	Policy Change Quote Quote Back Next 2 Edit Sum Change Quote Palicy Number Policy Address Policy Number Policy Period 11/09/2021-11/04 Policy Info Policy Address BLCOMINGTON, IN 47406-7512 Policy Full Term 5201.48 Drivers County MORROE Premium Policy Full Term 5201.48 Vehices Underwriting Company AMCO Insurance Company Pilter Mange in 0 Vehices Summary Premium Details Cost Change Details Applied Discounts/Surchanges Underwriting Policy Level Discounts/Surchanges Policy Level Discount Advance Quote Discount Policy Renew Description the Moleson Discount Multi-Beat Discount Multi-Beat Discount			

Step 8	
Action	Screen
The "Policy Change Bound" screen displays. This indicates the change is bound.	Desistop Account Policy (I = Search) Ieam Administration Testing Testing





Add an Additional Motor

Step 2

	Screen			
On the "Vehicles" screen in the "Vehicle Details" section select "Create Vehicle." Select the desired vehicle you wish to add via the "Vehicle Type" drop-down list. Select "Motor."		Account Policy Policy Policy Change (Pending) Vehicle Policy Change (Pending) Vehicle Policy Pol	SCREEN Search I Testing T Pleasure Boatowners Indiana Effective: C Med> Quote Withdraw Work Orde Med> Quote Withdraw Work Orde Med> Quote Withdraw Work Orde T Replace Wehcle Ype T Add You T D D D D D D D D D D D D D	raining

Action	Screen
Enter all required fields (required fields are indicated by a red asterisk). Select the "Next" button at the top of the screen to move on to "Coverages".	I Desktop Account Policy Search I eam Testing Training : * * * * * * * * * * * * * * * * * * *



Step 4

Action	Screen	
On the "Coverages" screen:	Desktop Image: Account Image: Peolicy Search Image: Testing Image: Training Image: Testing Image: Testing	: 🛛 🕹
Verify all coverages for the added motor.	Policy Change COVE/ages <back next=""> Quote Withdraw Work Order View Bill Calculate Coverages Rating Factors</back>	ator
Select "Next" to continue.	Policy Contract Transaction Effective Date Policy Info Total Pro-Rated Premium Drivers Fres Accidents/Nolations Taxes & Surcharges -	
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	Underwriting POlicy-level Coverages Policy Review Escription Policy Review Escription Quote Escription	Features Description Vanishing Deductib
	Tools Vehicle-Level Coverages Coverages 2020 May-Craft Boats 1900 CC Term Amount 20)20 Yamaha F150JB J

Step 5

Action		Sc	creen	
In the "Policy Review" section:	Desktop Actions	▼ Account ▼ Policy ▼ Se ✓ Policy Change (Pending) P	arc <u>h</u> ▼ <u>I</u> eam Testing ▼ Train Pleasure Boatowners Indiana Effective: 08/2	ning 👻 🔅 🖉 🕲
Review the coverage changes for the revised policy. If everything is correct, move to the next step. If something	Policy Change Pending Policy Contract	Policy Review	Back Quote Withdraw Work Order	View Bill Calculator
needs to change, select the "Back" button or one of the menu items in the left navigation to make any corrections.	Policy Info Drivers Accidents/Violations	Item Vehicles 2020 Yamaha F150JB Jet	Existing Policy	Policy Change: 82219018
Select the "Quote" button.	Vehicles Lienholder/Additional Interest Coverages	Coverages Collision Comprehensive Physical Damage Settleme Options	ent	ચ ચ ચ
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Action	Screen
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Select the "OK" button on the Issue Change pop-up window after reviewing the disclosure statement.	Policy Contract Policy Number Policy Period 08/28/2021-08/2 Policy Vumber Policy Number Policy Period 08/28/2021-08/2 Policy Vumber Premium \$100.00 Policy Vumber Policy Address BLOOMINGTON, IN 47406-7512 Premium \$201.48 Drivers County MONROE Premium \$201.48 Vehicks Underwriting Company AMCD Insurance Company Premium \$201.48 Vehicks Underwriting Company AMCD Insurance Company Premium \$101.48 Summary Premium Details Coxt Change Details Applied Discounts/Surcharges Policy Review Underwriting Policy Review Discription ‡ Advance Quote Discount Advance Quote Discount Policy Review Discount Multi-Boat Discount Multi-Boat Discount Surance Surance Details



Step 7 Action Screen Policy - Search - Team Administration - Testing -: 🛛 🔿 <u>Ú</u> Des<u>k</u>top Account -The "Policy Change Bound" screen displays. This indicates Notorcycle and Off-Road Indiana Effective: 11/17/2021 the change is bound. Policy Change Bound Your Policy Change (#21068942) has been bound. • View your policy Documents Review Changes Go to your desk

Replace an Additional Motor

ActionScreenOn the "Vehicles" screen:I Description of the vehicle # which needs to be replaced.Select the "Replace Vehicle" button.I Description of the vehicle # which needs to be replaced.Select the "Replace Vehicle" button.I Description of the vehicle # which needs to be replaced.Select the "Replace Vehicle" button.I Description of the vehicle # which needs to be replaced.Select the "Replace Vehicle" button.I Description of the vehicle # which needs to be replaced.Select the "Replace Vehicle" button.I Description of the vehicle # which needs to be replaced.Select the "Replace Vehicle" button.I Description of the vehicle # which i But which testing the testing testin		
On the "Vehicles" screen: Select the checkbox to the left of the Vehicle # which needs to be replaced. Select the "Replace Vehicle" button.	Action	Screen
	On the "Vehicles" screen: Select the checkbox to the left of the Vehicle # which needs to be replaced. Select the "Replace Vehicle" button.	Image: Contract Policy Change Policy Contract Policy Info Vehicle # © whick is Weick # © whick is Weick # © whick is Policy Review Inin Weick # Information Weick # Information



Step 3

Action	Screen
Action In the "Vehicle Details" section: • Complete all required fields. • Select the "Next" button.	Screen Image: Search in the search
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Step 4 Action Screen Ú Des<u>k</u>top 🔽 Account | • Policy | • Search | • Jeam Testing | • Training | • : 🖸 🚳 On the "Coverages" screen: Pleasure Boatowners Indiana Effective: 08/28/2021 K Policy Change (Pending) < Back Next > Quote Withdraw Work Order View Bill Calculator Coverages Verify all coverages for the added motor and make Policy Change Pending Cove Rating Factors changes if needed. Transaction Effective Date Total Pro-Rated Premium Select the "Next" button. Fees Acciden Taxes & Surcharges Total Pro-Rated Cost Pro-Rated Change in Cost Policy-level Coverages Features Term Amount Description Description Fishing Equipment Vanishing Deductil Subtotal: Vehicle-Level Coverages 2020 Mercury 115ECXLI STROKE 2020 May-Craft Boats 1900 CC Term Amount



Step 5

Step 5	
Action	Screen
In the "Policy Review" section review the coverage changes for the revised policy. If everything is correct, move to the next step. If something needs to change, select the "Back" button or one of the menu items in the left navigation to make any corrections. Select the "Quote" button.	Image: Policy Change: Policy Change (Pending) Pleasure Boatowners Indiana Effective: 08/28/2021 Image: Policy Change (Pending) Policy Change: Pending Pleasure Boatowners Indiana Effective: 08/28/2021 Image: Policy Change Policy Change: Pending Pleasure Boatowners Indiana Effective: 08/28/2021 Image: Policy Change Policy Change: Pending Pleasure Boatowners Indiana Effective: 08/28/2021 Image: Policy Change Policy Change: Pending Pleasure Boatowners Indiana Effective: 08/28/2021 Image: Policy Change Policy Change: Pending Policy Change: Editing Policy and Bs Bs Image: Policy Change: Editing Policy and Bs Drivers Image: Policy Change: Editing Policy and Bs Image: Policy Change: Editing Policy C
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	Coverages Quote Collision √ x Forms Comprehensive √ x

Action	Screen
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Select the "OK" button on the Issue Change pop-up window after reviewing the disclosure statement.	Policy Contract Primary Named Insured Previous Policy Full Term \$201.48 Policy Info Policy Address BLOOMINGTON, IN 147406-7512 Previous Policy Full Term \$201.49 Onivers County MONROE Premium \$201.49 Accidents/Molations Underwriting Company AMCO Insurance Company Full Term Change in premium 0
	Vehicles Summary Premium Details Cost Change Details Applied Discounts/Surcharges Coverages Applied Discounts/Surcharges Underwriting Policy Review Obscude

Step 7	
Action	Screen
The Policy Change Bound screen displays. This indicates the change is bound.	Desjtop V Account V Bolicy V Search V Ieam Administration V Testing V : © Policy Change (Bound) Composition of the search V II/1/2021 Policy Change Bulling Account: Inquiry Policy Change (\$1803004) has been bound. View your policy Documents Review Changes Cos to waar destann





Remove an Additional Motor

Step 2



Action	Screen
After removing the motor Select the "Next" button to continue.	Pektop - Account - Policy - Search - Team Testing - Training - :: Policy Change (Pending) Pleasure Boatcomers Indiana Effective: 08/28/021 Vehicle Calculator Vehicle Canada Vehicle Calculator Vehicle Details Vehicle Type Vehicle Details Vehicle Type Vehicle Type Vehicle Type Vehicle Details Vehicle Type Veh



Step 4

Action	Screen
On the "Coverages" screen:	Desktop • Account • Policy • Search • Ieam Testing • Training •
on the obverages screen.	Actions Policy Change (Pending) Pleasure Boatowners Indiana Effective: 08/28/2021 1
Verify all coverages for the deleted motor.	Policy Change COVE/ages < Back Next> Quote Withdraw Work Order View Bill Calculator Pending
, ,	Policy Contract Coverages Rating Factors
Select "Next" button.	Policy Info Total Pro-Rated Premium -
	Drivers Fees - Accidents/Violations Taxes & Surchartee
	Vehicles Total Pro-Rated Cost -
	Uenholder/Additional Interest Pro-Rated Change in Cost
	POIICy-level Coverages Features Description Term Amount Description
	Policy Review Fishing Equipment Unishing Dec
	Subtotal:
	Tools Vehicle-Level Coverages
	Notes Coverages 2020 May Craft Boats 1900 CC Term Amount
	Participants Comprehensive Workplan 250
	2.00

Action	Screen
In the "Policy Review" section:	Desktop Account Policy Search Ieam Testing Training Image: Image: Image:
Review the coverage changes for the revised policy.	Policy Change Pending Differences
If everything is correct, move to the next step. If something needs to change, select the "Back" button or one of the	Policy Contract Comparing Disting Policy and Policy Change: 82464257 Drivers Comparing Disting Policy and Policy Change: 82464257 Drivers team Existing Policy Policy Change: 82464257
menu items in the left navigation to make any corrections.	Vehicles ✓ 2020 Yamaha F150.8 Jet √ × Vehicles ✓ Coverages ✓ Lienhöder/Additional Interest Collision √ ×
Select the "Quote" button.	Coverages Comprehensive V X Underwriting Physical Damage Settlement V X
	Policy Review



Step 6	
Action	Screen
On the "Quote" screen: Select the "Issue Change" button. Select the "OK" button on the Issue Change pop-up window after reviewing the disclosure statement.	L Desktop Account Policy Change (Quoted) Counts Policy Address BLOOMINGTON, IN 47406-7512 Policy Address County MONROE Undewriting Company Permium Permium

Step 7	
Action	Screen
The Policy Change Bound screen displays. This indicates the change is bound.	Desktop Account Policy Search Ieam Administration Testing Iesm Image: Testing Im

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