

Add or Delete Secondary Insured – Auto/Property PolicyCenter



Description

This job aid reviews how to add and delete a secondary named insured to an Auto policy. The process is also the same to add or delete a secondary named insured to a Property policy.

In PolicyCenter, the most common Secondary Named Insured is the spouse of the Primary Named Insured (PNI). If the PNI is married, the spouse will have to be listed on the Property policy as a Secondary Named Insured. On an Auto policy, to have the Primary Named Insured and their spouse printed on ID Cards, the spouse needs to be listed as the Secondary Named Insured.

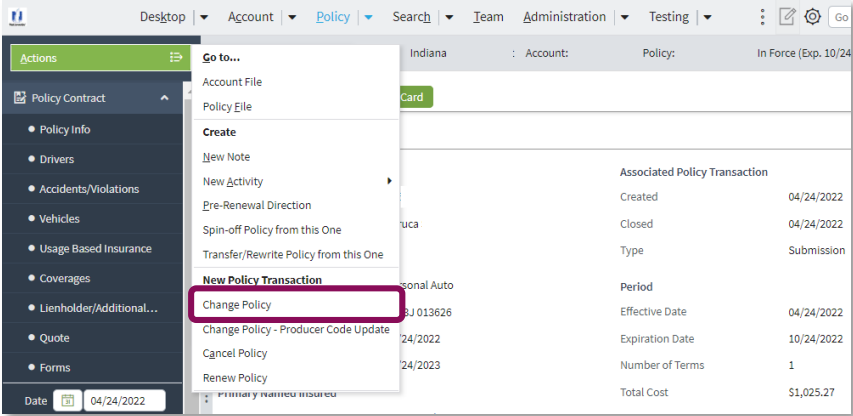
Select the link to advance to the desired procedure:

- [Add a Secondary Named Insured](#)
- [Delete a Secondary Named Insured](#)

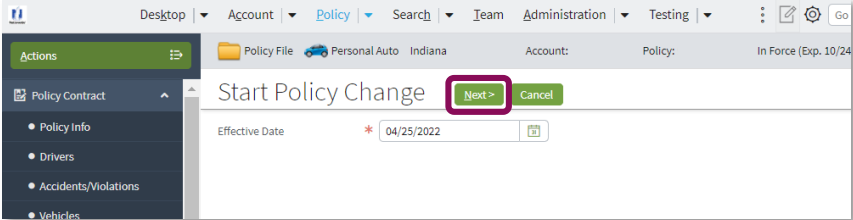
NOTE: If you are deleting a Secondary Named Insured due to Divorce/Separation or Deceased Named Insured, see [Life Events Job Aid](#).

Add a Secondary Named Insured

Step 1

Action	Screen
<p>Open an existing Auto 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 PolicyCenter application interface. The 'Actions' menu is open, displaying 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', 'Change Policy - Producer Code Update', 'Cancel Policy', and 'Renew Policy'. The 'Change Policy' option is highlighted with a red box. The background shows a policy summary for a Personal Auto policy in Indiana, with fields for Account, Policy, and In Force (Exp. 10/24).</p>

Step 2

Action	Screen
<p>On the <i>Start Policy Change</i> screen, the Effective Date field defaults to the current date.</p> <ul style="list-style-type: none">• If the needed start date is different than the default, enter the necessary information in the Effective Date field.• Select the Next > button.	 <p>The screenshot shows the 'Start Policy Change' screen. The 'Effective Date' field is highlighted with a red box, showing a default date of 04/25/2022. The 'Next >' button is also highlighted with a red box. The background shows the same policy summary as in Step 1.</p>

Add a Secondary Named Insured, continued

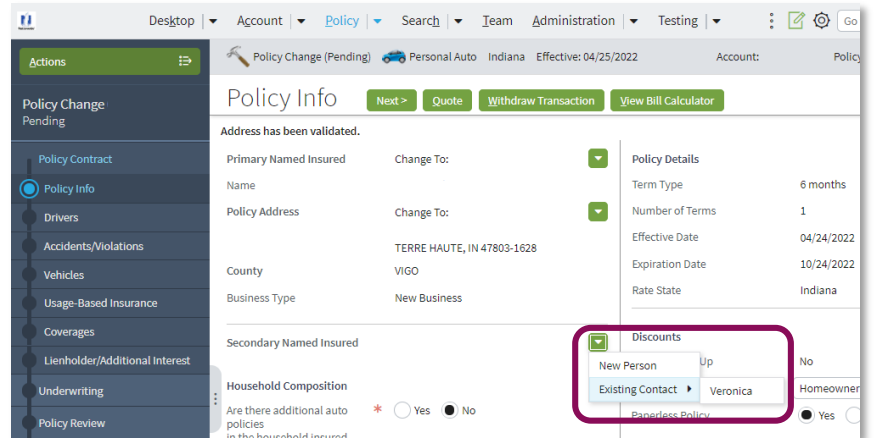
Step 3

Action

On the *Policy Info* screen:

- Select the down arrow to the right of the **Secondary Named Insured** field.
- Select **"New Person"**, if the contact does not exist.
- Select **"Existing Contact"**, if the contact exists, and then the desired individual displayed to the right of **Existing Contact**.

Screen



The screenshot shows the 'Policy Info' screen with a sidebar on the left containing menu items: Policy Change Pending, Policy Contract, Policy Info (selected), Drivers, Accidents/Violations, Vehicles, Usage-Based Insurance, Coverages, Lienholder/Additional Interest, Underwriting, and Policy Review. The main content area shows 'Address has been validated.' and fields for Primary Named Insured, Policy Address, County, Business Type, and Secondary Named Insured. The Secondary Named Insured dropdown menu is open, showing options: New Person, Existing Contact (selected), and Veronica. The 'Existing Contact' option is highlighted with a red box.

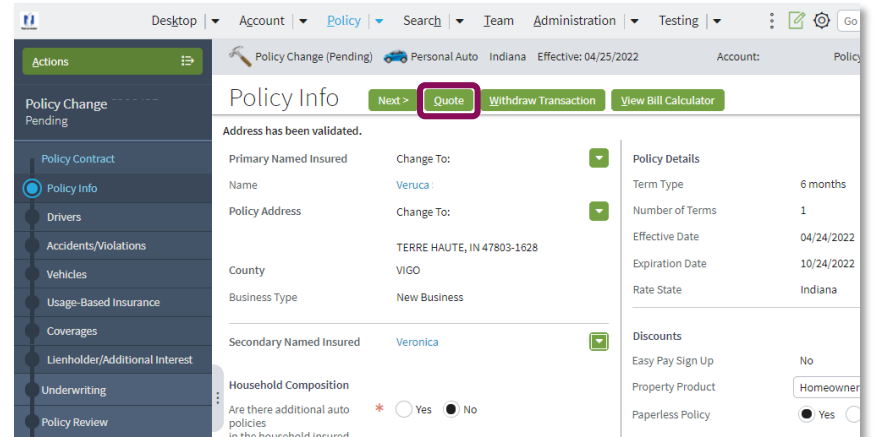
Step 4

Action

The secondary named insured is added.

- Select the **Quote** button.

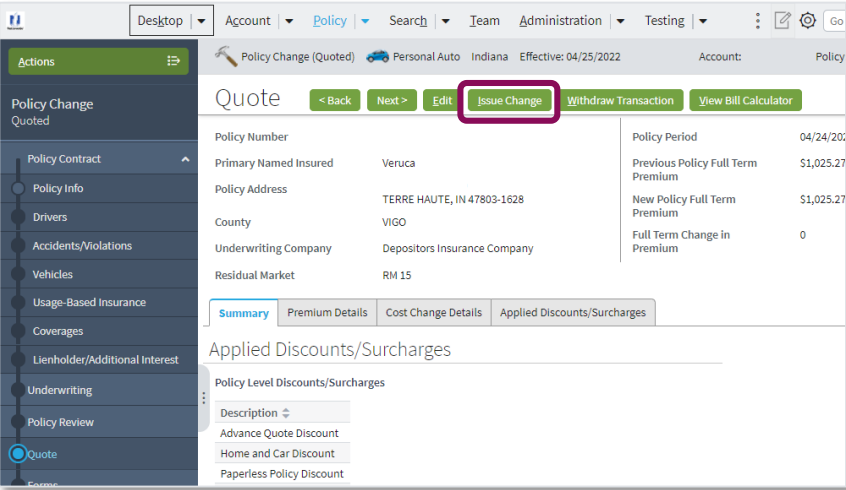
Screen



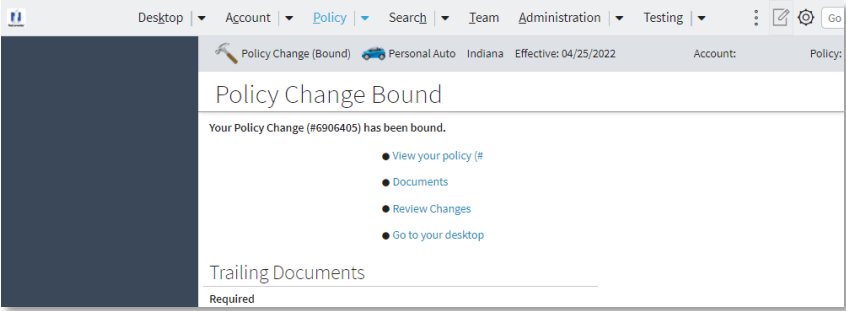
The screenshot shows the 'Policy Info' screen with the same sidebar as in Step 3. The main content area shows 'Address has been validated.' and fields for Primary Named Insured, Policy Address, County, Business Type, and Secondary Named Insured. The Secondary Named Insured field now displays 'Veronica'. The 'Quote' button is highlighted with a red box.

Add a Secondary Named Insured, continued

Step 5

Action	Screen
<p>On the <i>Quote</i> screen:</p> <ul style="list-style-type: none">• Select the Issue Change button.• On the pop-up confirmation window, select the OK button.	

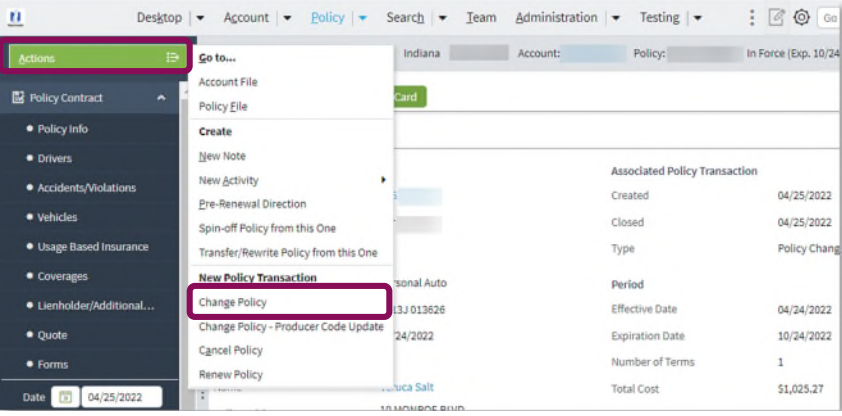
Step 6

Action	Screen
<p>You have successfully added a Secondary Named Insured to an Auto Policy.</p>	

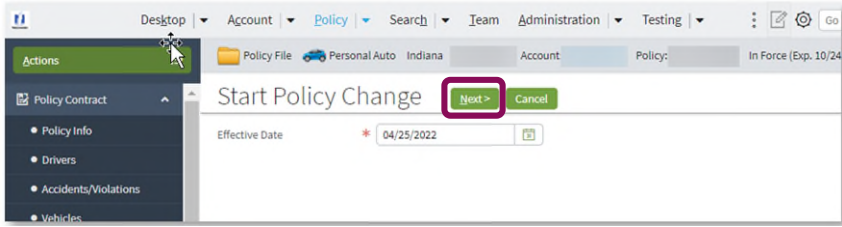
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Delete a Secondary Named Insured

Step 1

Action	Screen
<p>Open an existing Auto 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 Center application interface. The 'Actions' menu is open, displaying various options. The 'Change Policy' option is highlighted with a red box. The background shows a policy summary for a Personal Auto policy in Indiana, with details like Effective Date (04/25/2022) and Expiration Date (10/24/2022).</p>

Step 2

Action	Screen
<p>On the <i>Start Policy Change</i> screen the Effective Date field defaults to the current date.</p> <ul style="list-style-type: none">• If the needed start date is different than the default, enter the necessary 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, showing the default date of 04/25/2022. The 'Next >' button is highlighted with a red box. The background shows the same policy summary as in Step 1.</p>

Delete a Secondary Named Insured, continued

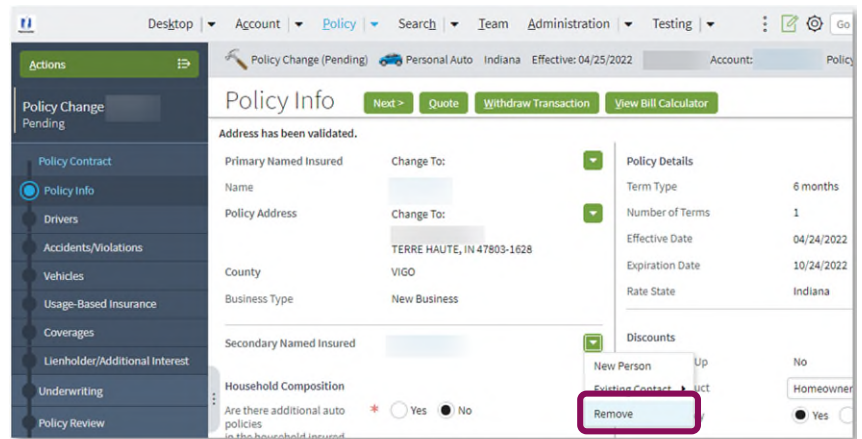
Step 3

Action

On the *Policy Info* screen:

- Select the down arrow to the right of the **Secondary Named Insured** name listed on the policy.
- Select **“Remove”** from the drop-down list.

Screen



The screenshot shows the 'Policy Info' screen in the PolicyCenter application. The left sidebar contains a list of actions: Policy Change Pending, Policy Contract, Policy Info (selected), Drivers, Accidents/Violations, Vehicles, Usage-Based Insurance, Coverages, Lienholder/Additional Interest, Underwriting, and Policy Review. The main content area displays policy details for a 'Personal Auto' policy in Indiana, effective 04/25/2022. The 'Secondary Named Insured' field is highlighted, and a dropdown menu is open, showing options: 'New Person', 'Existing Contract', and 'Remove'. The 'Remove' option is selected and highlighted with a red box.

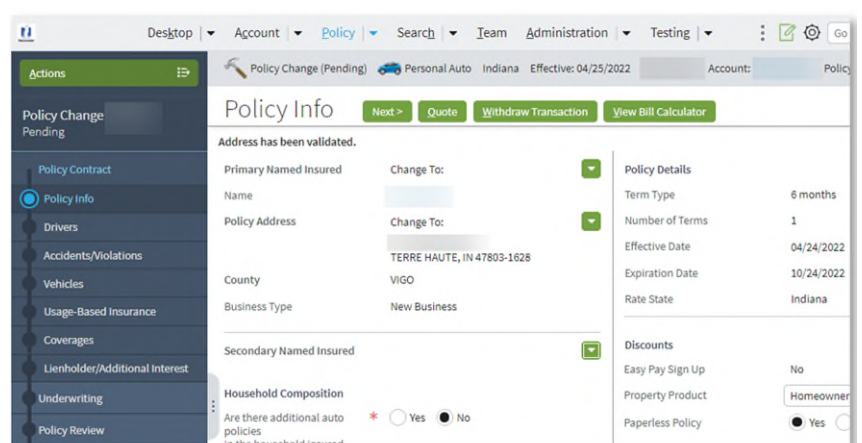
Step 4

Action

The secondary named insured is removed.

- Quote and Issue the pending Policy Change.

Screen



The screenshot shows the 'Policy Info' screen after the secondary named insured has been removed. The 'Secondary Named Insured' field is now empty. The rest of the screen, including the sidebar and policy details, remains the same as in Step 3.

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