

Add and Remove a Driver

In Brief

In this Quick Card, a policyholder has requested to add a driver to her policy. A couple weeks later, she calls back to remove the driver from her policy.

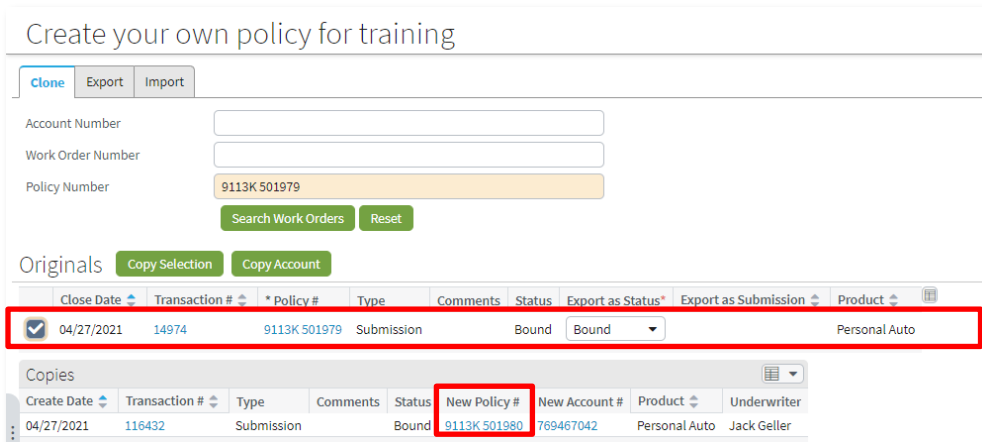
Log in to the [VTO](#) using the appropriate generic user account from the **VTO Information Guide** document.

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 "**9113K 501979**" 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 #**14974**.



Create your own policy for training

Clone Export Import

Account Number

Work Order Number

Policy Number

9113K 501979

Search Work Orders Reset

Originals Copy Selection Copy Account

Close Date	Transaction #	* Policy #	Type	Comments	Status	Export as Status*	Export as Submission	Product
<input checked="" type="checkbox"/>	04/27/2021	14974	9113K 501979	Submission	Bound	Bound		Personal Auto

Copies

Create Date	Transaction #	Type	Comments	Status	New Policy #	New Account #	Product	Underwriter
04/27/2021	116432	Submission		Bound	9113K 501980	769467042	Personal Auto	Jack Geller

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 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 “**Vera**” 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 “**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.*”

Remove a Driver

Submission Bound screen

1. Click the **View your Policy (#XXXX)** link to access the same policy that was used for “Add a Driver”.

Summary screen

2. Click the **Actions** button.
3. Select “**Change Policy**” from the drop-down menu.

Start Policy Change screen

4. 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 current date.
5. Click the **Next >** button.

Policy Info screen

6. Click the **Next >** button.

Drivers screen

7. Review the *Driver Details* section information.
8. Click the checkbox to the left of driver you added in the previous exercise. In this example, “**Vera Salt**”.
9. Click the **Remove** button.

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

10. Click the **Quote** button.

Quote screen

11. Click the **Issue Change** button.
12. Click the **OK** button.



Policy Change Bound screen

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