#### **Description and Background**

This job aid provides the steps to set Auto Coverage defaults in PolicyCenter. Currently, Coverage defaults are only available for Auto.

Auto Coverage Defaults are created at the Producer Code level. This means that if you write in multiple states—that is, you have multiple Producer Codes—you must create defaults for each Producer Code. Setting the default for each Producer Code is a one-time process. **Note**: You can set preferences from any screen in PolicyCenter.

Step 1	
Action	Screen
<ul> <li>From any screen in PolicyCenter:</li> <li>Select the <b>Preferences</b> link in the upper right corner of the screen.</li> </ul>	PolicyCenter* Desktop ▼ Account ▼ Policy ▼ Search ▼ Ieam Administration ▼ Testing ▼ :
Step 2	
Action	Screen
<ul> <li>In the Preferences section, the Coverage Templates tab displays.</li> <li>Note: You can enlarge the Preferences section by dragging the line upward to minimize scrolling.</li> <li>Select the appropriate Producer Code from the dropdown list.</li> <li>Note: The current defaults display once you select the desired Producer Code. Rather than create a new set of defaults, you can alter the current defaults by selecting the Update button to reset the default values. If you write policies in multiple states, it is necessary to set the defaults for each Producer Code/State combination.</li> <li>Select the Add button.</li> </ul>	PolicyCenter® Desktop  Account  Policy  Search  Ieam Administration  Testing  Training   Policy  Account  Policy  Account  Print / Export All open  No data to display  No data to display  No data to display  No data to display



## Step 3

Action	Screen
<ul> <li>In the Coverages Templates section:</li> <li>Select Personal Auto from the Product field dropdown list.</li> <li>Note: Currently, Quote Defaults are only available for the auto line of business.</li> </ul>	PolicyCenter® Desktop * Account * Policy * Search * Ieam Administration * Testing * Training * : © © Coto/Ale/?   Actores My Activities   My Activities Aligner   My Submissions * Due Date * Priority * Status * Subject * ID Agreem   My Benevals No date to display   My Other Policy Trainsactions No date to display   My Cueues *
Step 4	
Action	Screen





### Step 7

#### Action

In the **Policy-level Coverages** and **Features** sections:

• Select the remaining coverage defaults.

**Note**: It may be necessary to scroll down to view all coverage fields.

Coverages in these sections include:

- Roadside Assistance
- Option
- o Identity Theft
- Accident Forgiveness
- Minor Violation Forgiveness
- Vanishing Deductible
- o Total Loss Deductible Waiver

#### Step 8

#### Action

In the Vehicle Level Coverages section:

· Select the coverage defaults

**Note:** It may be necessary to scroll down to view all coverage fields.

Coverages in these sections include:

- Physical Damage Coverages with Deductibles
- o Rental Reimbursement
- o New Car Replacement Plus
- Loan/Lease Gap
- Liability Coverages
- Medical Payments
- Uninsured/Underinsured Motorist Coverages

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Collision	Add coverage 👻		
Deductible *	500 👻		- 11
Rental Reimbursement	Add coverage		
Limit *	40 Per Day/1,200 Per Accident		
New Car Barlanese at Dive			
New Car Replacement Plus	<none selected=""></none>		
Loan/Lease Gap	<none selected=""></none>		
Bodily Injury	Add coverage		
Limit *	300/300 -		

Screen

Screen

Features

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Add coverage

Add coverage

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Mv Activities

Policy-level Coverages

Vehicle Level Coverages

Roadside Assistance Option

Identity Theft

Comprehensive

Add coverage

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### Step 5

Action	Screen
For each coverage default under the <b>Policy-</b> level Coverages section:	PolicyCenter® Desition + Account   P. Bolicy   Search   F. Isam Administration + Testing   Training   E. [] (Conto Data)      Account   P. May Activities      My Activities      Account   Prest/Coonto   Allopen +
• Select whether you wish to add or remove the coverage from Quote Default setting.	My Submissions     Image: Due Date C     Priority C     Status C     Status C     No     Agreem       My Submissions     No data to deplay     No data to deplay
In this example:	Wy Queues     >       Preferences        Philosuleuel Coverages     Features
<ul> <li>Select Add Coverage or Remove Coverage from the Roadside Assistance field.</li> </ul>	Total for the open open open open open open open ope
<b>Note</b> : You may have to scroll to view all fields in the <b>Vehicle Level Coverages</b> section.	Vehicle Level Coverages Comprehensive Collision Froms salected+ Collision Froms salected+ Tental fielmbursement Froms salected+
Step 6	
Action	Screen
Action After selecting the Add Coverage option, the Options field displays beneath the coverage:	Screen
Action After selecting the Add Coverage option, the Options field displays beneath the coverage: • Select the appropriate coverage option from the list.	Screen
Action         After selecting the Add Coverage option, the Options field displays beneath the coverage:         • Select the appropriate coverage option from the list.         In this example:	Screen
Action         After selecting the Add Coverage option, the Options field displays beneath the coverage:         • Select the appropriate coverage option from the list.         In this example:         • Select Plus or Basic from the Option dropdown list.	Screen PolicyCenter Desideo Account Dellay Search Team Administration Testing Training C O Del Della
Action         After selecting the Add Coverage option, the Options field displays beneath the coverage:         • Select the appropriate coverage option from the list.         In this example:         • Select Plus or Basic from the Option dropdown list.	Screen         Image: Delay Control of the Delay image: Subject image: Training image
Action         After selecting the Add Coverage option, the Options field displays beneath the coverage:         • Select the appropriate coverage option from the list.         In this example:         • Select Plus or Basic from the Option dropdown list.	Screen         Image: PolicyCenter @ bestop @ Account @ belly @ search @ team @dministration @ testing @ training @ @ @ @ @ @ @ @ @ @ @ @ @ @ @ @ @ @ @
Action         After selecting the Add Coverage option, the Options field displays beneath the coverage:         • Select the appropriate coverage option from the list.         In this example:         • Select Plus or Basic from the Option dropdown list.	ScreenImage: Delegation of the balance of the bala





### Step 9

Action	Screen
<ul> <li>After completing the necessary fields, scroll back up and:</li> <li>Select the Update button.</li> <li>The Preferences section automatically closes.</li> </ul>	Preferences   Jpdate   Coverage Templates   Preferences   Jpdate   Cancel   Producer Code   *   13001925S Training Agent   Product   State   *   N
Step 10	
Action	Screen
Your quote automatically defaults on the Coverages screen the next time you create a new quote (as shown here). You can make updates to the defaults on a quote-by-quote basis.	PolicyCenter* Destrop     Account Policy     Submission Pennonul Auto     Marcina COVErages     Coverages Destropion     Policy-Center* Destropion        Policy-Center* Destropion                    Policy-Level Coverages Features   Policy-Level Coverages Features   Policy-Level Coverages Nonevial Reserve   Policy-Level Coverages Venice Level Coverages

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