

Create a Named Non-Owner Auto Policy

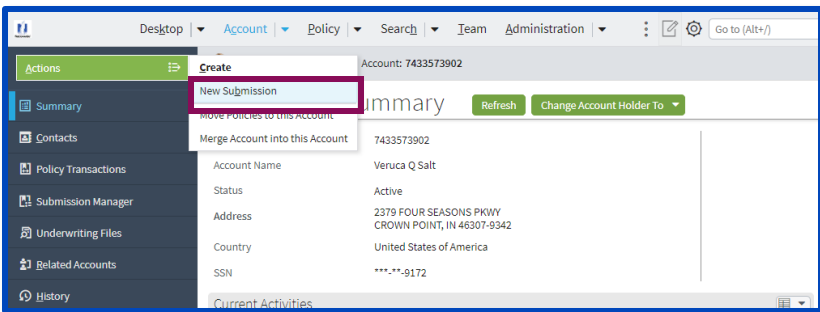


Description:

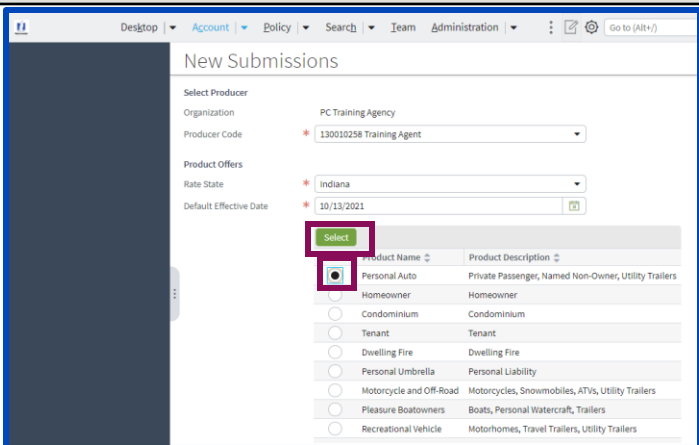
This job aid reviews how to create a named non-owner auto policy.

Job Aid Process:

Step 1

| Action | Screen |
|--|---|
| <p>Navigate to the Account of the specific client needing a named non-owner auto policy and create the submission.</p> <p>On the <i>Account Summary</i> screen:</p> <p>Select the arrow to the right of the Actions field.</p> <p>Select “New Submission” from the drop-down menu.</p> |  |

Step 2

| Action | Screen |
|--|--|
| <p>PolicyCenter defaults the Rate State to the prospective member’s mailing address.</p> <p>You can update the Default Effective Date on this screen or the <i>Policy Info</i> screen.</p> <p>Select the radio button to the left of the Personal Auto field.</p> <p>Select the Select button.</p> |  |

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Step 3

Action

On the *Policy Info* screen:

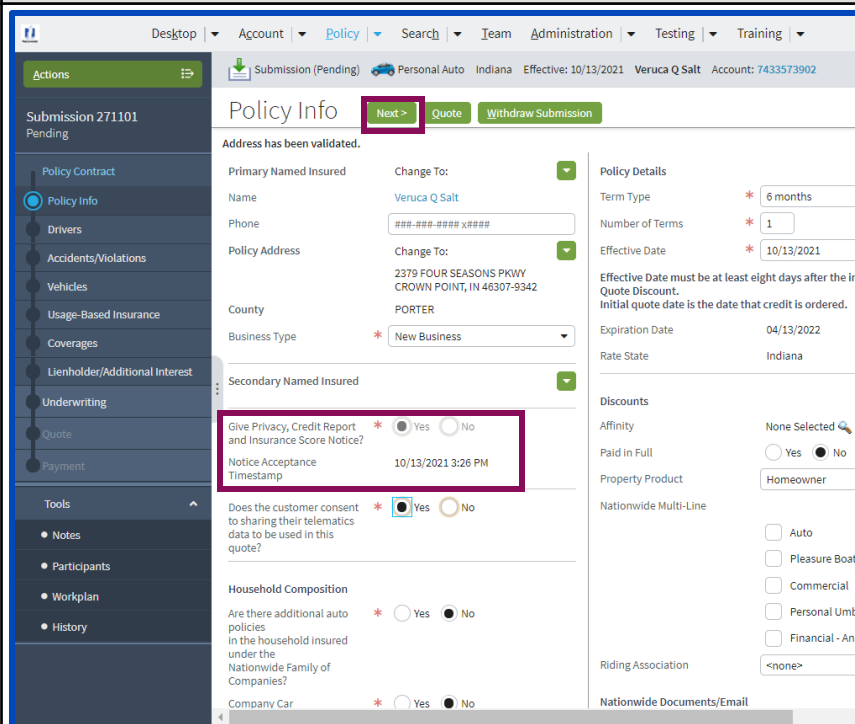
- Select the **Yes** radio button to select the **Give Privacy, Credit Report and Insurance Score Notice** option.
- Select the **OK** button on the *Give Privacy, Credit Report and Insurance Score Notice* pop-up window after reviewing the disclosure statement.
- Select the **Yes** radio button to select the **Does the customer consent to sharing their telematics data to be used in this quote** option.
- Complete all remaining *required* (*) fields.

Note: If you answer “Yes” to the **Automate Electronic Delivery of Required Documents** question, PolicyCenter will automatically send any required documents to the policyholder. To use this option, you MUST specify “**Online Account Access**” for **Designated Delivery Preference New Selection** and enter the policyholder’s email address.

Note: The default **Document Delivery Preference New Selection** field is “**Online Account Access (email)**”. If this default value is accepted, then an **Email Address** is *required*.

- Select **Next >** button.

Screen



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Step 4

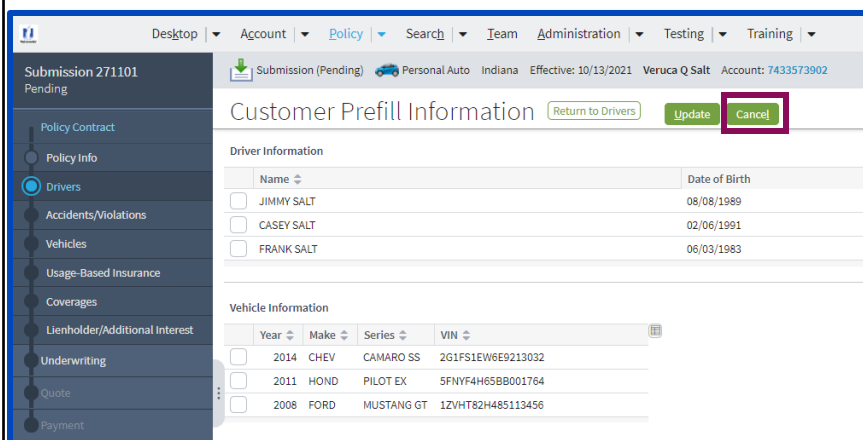
Action

PolicyCenter will make a call to Customer Prefill. The *Customer Prefill Information* screen displays any known household members and vehicles associated with the name and address of the primary named insured.

Named Non-Owner coverage is allowed for a maximum of two drivers: Primary Named Insured and Spouse (if applicable). You may need to confirm this information on the *Drivers* screen before developing a quote.

- Select the **Cancel** button.

Screen



The screenshot shows the 'Customer Prefill Information' screen. The 'Cancel' button is highlighted with a red box. The screen displays driver information for JIMMY SALT, CASEY SALT, and FRANK SALT, and vehicle information for a 2014 CHEV CAMARO SS, a 2011 HOND PILOT EX, and a 2008 FORD MUSTANG GT.

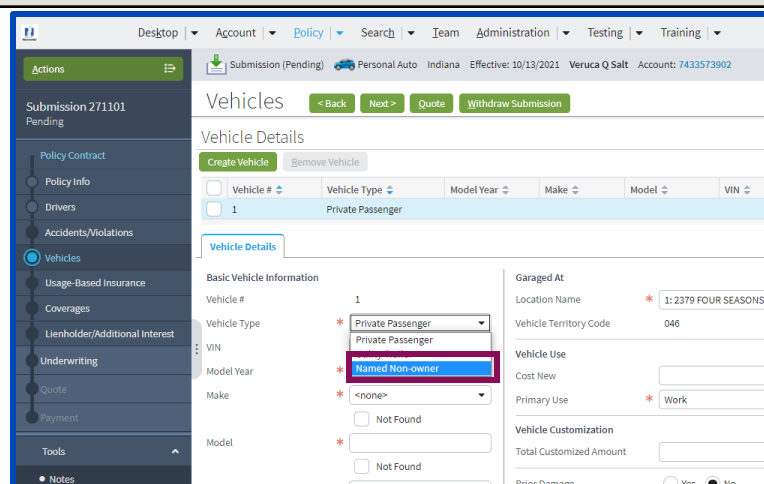
Step 5

Action

Advance to the *Vehicles* screen:

Select **Named Non-owner** from the **Vehicle Type** field drop-down list in the *Vehicle Details* section.

Screen



The screenshot shows the 'Vehicles' screen. The 'Named Non-owner' option in the 'Vehicle Type' dropdown is highlighted with a red box. The screen displays vehicle details for a 2014 CHEV CAMARO SS, including VIN, Model Year, Make, and Model.

Step 6

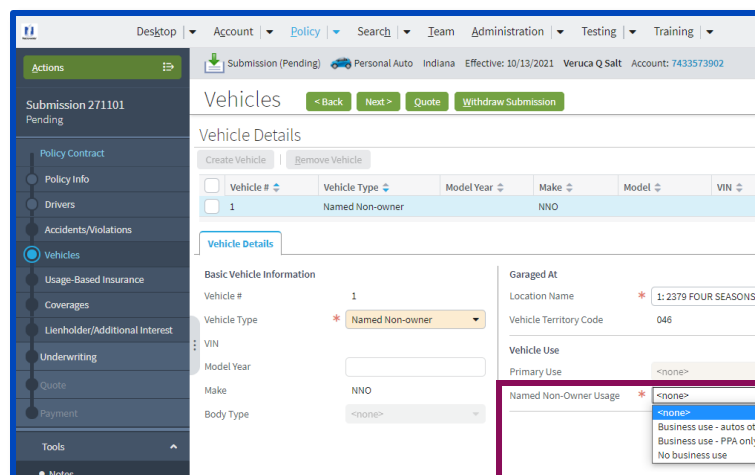
Action

On the *Vehicle* screen:

- Select the necessary **Named Non-Owner Usage** entry from the field's drop-down list.

Note: Notice once you select **Named Non-owner** for the **Vehicle** type, various fields related to the specific vehicle disappear or gray out. Answer all required questions.

Screen



The screenshot shows the 'Vehicles' screen. The 'Named Non-Owner Usage' dropdown menu is open, showing options like 'Business use - autos on', 'Business use - PPA only', and 'No business use'. The 'Named Non-owner' option in the 'Vehicle Type' dropdown is also highlighted with a red box.

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Step 7

| Action | Screen |
|---|--------|
| <p>On the <i>Vehicles</i> screen:</p> <ul style="list-style-type: none">Select the Next > button. | |

Step 8

| Action | Screen |
|---|--------|
| <p>Usage-Based Insurance is not available for Named Non-Owner Auto policies. The system automatically defaults the Policy Enrollment Details Policy Program to Declined.</p> <p>Select the Next > button.</p> | |

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Step 9

Action

On the *Coverages* screen, the **Policy-level Coverages** display on the top half of the screen with the **Vehicle Level Coverages** on the bottom half:

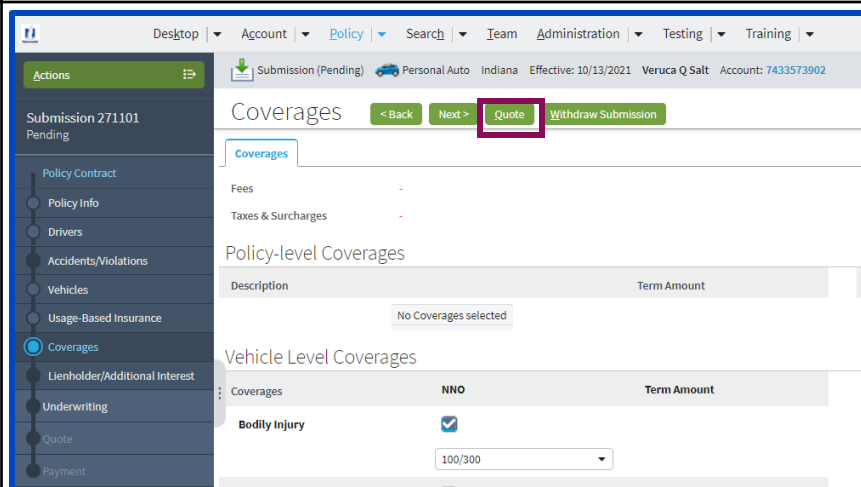
Select the appropriate vehicle-level coverages.

Note: Policy-level Coverages are not available for Named Non-Owner Auto policies.

If needed, advance to the *Lienholder/Additional Interest* screen and enter any necessary information.

Once all entries are complete, click the **Quote** button.

Screen

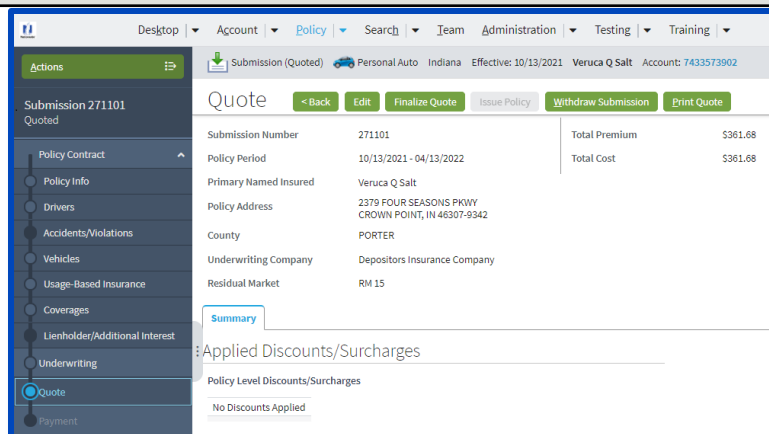


Step 10

Action

Finalize the quote and issue the policy.

Screen



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