How to Apply Excluded or Non-Driver to an Auto Policy

PolicyCenter

Description:

This job aid reviews how to apply excluded and non-driver status to listed drivers on an Auto policy and starts at the *Drivers* screen during the submission or policy change.



NOTE: Check your state guidelines in Reference Connect concerning excluded and nondrivers before you begin.

Step 1			
Action	Screen		
On the <i>Drivers</i> screen:	☐ PolicyCenter [™] Desktop ▼ Account ▼ Policy ▼ Search ▼ Ieam Administration ▼ Testing ▼ Training ▼ Live C		
	Actions 😝 🔨 Policy Change (Pending) 🚓 Personal Auto Indiana Eff. 11/19/2021 Veruca Salt Account # 4340449388 Policy # 92		
• Select the Driver <i>#</i> line for the driver to update the <i>Contact Detail</i> section.	Policy Change 37341587 DriVers <back net=""> Quote Withdraw Transaction Yiew Bill Calculator</back>		
	Priver Details		
	Policy Info # ± Name Date of Rith Gender Marital Status Relationship to Insured Driver Tyme III		
	Drivers 1 Veruca Salt 07/19/1984 Female Single Primary Named Insured Driver		
	Accidents/Violations 2 Victor Salt 03/16/2004 Male Single Child Driver		
	Vehicles Contact Detail		
	Usage-Based Insurance Person License Information Coverages Perfor Amplifying Coverages		
	Lienholder/Additional Interest First Name * Victor International License		

Step 2	
Action	Screen
On the Contact Detail tab:	PolicyCenter [®] Desktop • Account • Policy • Search • Team Administration • Testing • Training • LiveC Conce PolicyChange(Pending) A Perior Particular Eff.11/18/2021 Veruce Salt Account #430046338 PolicyEng
 Click the down arrow to the right of the Driver Type field. 	Policy Change 373/1507 Policy Change 373/1507 Policy Contract
 Select the appropriate item ("Excluded" or "Non-Driver") from the drop-down list. 	Accidents/Volations
	Underwriting Frist Name * Mctor International License Middle Name License State License State Policy Review Last Name License State Quote Suffix none> Driver Type Driver Additional Information
	Principal Driver * Distance Suddent living over 10 ausy without a car ausy without a car

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Job Aid Process (Cont.) :

Step 3

Action	Screen
Additional fields will display in the Contact Detail tab.	PolicyCenter [®] Desktop Account Policy Search Ieam Administration Testing Training Live C Actons Policy Change (Pending) Personal Auto Indiana Eff. 11/19/2021 Veruca Salt Account # 4340449388 Policy # 97 Policy Change 37341587 Policy Change 37341587 Pricer Details
 Click the down arrow to the right of the Reason field. 	Policy Contract. Add Bemove Policy Info # 0 have 0 bate of Birth 0 Gender 0 Marital Status 0 Relationship to Insured 0 Driver Type 0 Fill Drivers 1 Venuca Salt 07/19/1944 Fenale Single Primary Named Insured Driver Acadents/Nolations 2 Victor Salt 03/16/2004 Male Single Child Excluded
• Select the appropriate reason from the drop-down list.	Vehicles Contact Detail Usage-Based Insurance Person Coverages Perfix Prefix ronne> Circl Name Terror
• Proceed with the submission or policy change as usual.	Underwriting i Middle Name License state Policy Review Last Name License # Quote Suffix mone> Tools Ditwer Type Excluded Notes Age Noticensed due to medical reasons other Participants Gender Workplan

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