Add or Delete Secondary Insured – Auto/Property PolicyCenter

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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.

By accepting a copy of these materials:

(2) I agree that the information contained in this training presentation is confidential and proprietary to Nationwide and may not be disclosed or provided to third parties without Nationwide's prior written consent.

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Add/Delete Secondary Insured – Auto/Property (2 of 6) PolicyCenter



Add a Secondary Named Insured

Step 1

Action	Screen
Open an existing Auto policy.	11 Desktop ▼ Account ▼ Policy ▼ Search ▼ Ieam Administration ▼ Testing ▼ : Image: Contract of the second secon
 Select the Actions button. Select Change Policy from the drop- down menu. 	Actions Go to Indiana Account: Policy: In Force (Exp. 10/2) Account File Account File Card Policy Enfo Create Policy: Indiana Account: Policy: In Force (Exp. 10/2) Policy Info Create Policy: Accodents/Violations Pre-Renewal Direction Created 04/24/2022 Vehicles Spin-off Policy from this One Transfer/Rewrite Policy from this One Type Submission Coverages Usage Based Insurance Change Policy - Producer Code Update 04/24/2022 Eprivation Date 04/24/2022 Quote Change Policy 24/2022 Eprivation Date 10/24/2022 Change Policy 24/2023 Number of Terms 1 Date Od/24/2022 Total Cost \$1,025.27
Step 2	
Action	Screen
 On the Start Policy Change screen, the Effective Date field defaults to the current date. If the needed start date is different than the default, enter the necessary information in the Effective Date field. Select the Next > button. 	Desktop × Account × Policy × Search × Ieam Administration × Testing × : © © Ge Actions Policy File Personal Auto Indiana Account: Policy: In Force (Exp. 10/2 Policy Contract Policy Info Policy Info Policy Info Effective Date * 04/25/2022 Policy Info Nothicitae

Add/Delete Secondary Insured – Auto/Property (3 of 6) PolicyCenter



Add a Secondary Named Insured, continued

Step 3

Action	Screen	
 On the <i>Policy Info</i> 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. 	Image: Desktop Account Policy Search Ieam Administration Testing Image: Policy Actions Image: Policy Change (Pending) Personal Auto Indiana Effective: 04/25/2022 Account: Policy Change Policy Change (Pending) Personal Auto Indiana Effective: 04/25/2022 Account: Policy Change Policy Change Policy Info Next> Quote Withdraw Transaction Verw Bill Calculator Policy Contract Primary Named Insured Change To: Policy Details Term Type 6 m Policy Info Name Policy Address Change To: Policy Details Term Type 6 m Policy Address Change To: Policy Info Name Policy Origo Number of Terms 1 Usage Based Insurance County Vi6O Eusiness Type New Business Effective Date 04/ Underwriting Household Composition New Business Image: Panetees Boliny No Executive Panetees Boliny No Policy Review Policy Review Policy Review Yes No Panetees Boliny Panetees Bo	Ge Ge Polle Polle Polle (24/2022 (24/2022 diana , ,) Pollo (24/2022 diana) Pollo (24/202 diana)

Step 4

Action	Screen				
The secondary named insured is added.					
 Select the Quote button. 	L Desktop	Account Policy Policy Change (Pending)	 Search	n 👻 Testing 👻 : 5/2022 Account:	Polic
	Policy Change Pending	Policy Info	Next > Quote Withdraw Transaction	View Bill Calculator	
	Policy Contract	Primary Named Insured	Change To:	Policy Details	Emonths
	Drivers	Policy Address	Change To:	Number of Terms	1
	Accidents/Violations Vehicles	County	TERRE HAUTE, IN 47803-1628 VIGO	Expiration Date	10/24/2022
	Usage-Based Insurance Coverages	Business Type Secondary Named Insured	Veronica	Discounts	
	Lienholder/Additional Interest	Household Composition		Easy Pay Sign Up Property Product	No Homeowne
	Policy Review	Are there additional auto policies	* Ves • No	Paperless Policy	• Yes

Add/Delete Secondary Insured – Auto/Property (4 of 6) PolicyCenter



Add a Secondary Named Insured, continued

Step 5

Action	Screen
 On the <i>Quote</i> screen: Select the Issue Change button. On the pop-up confirmation window, select the OK button. 	Desktop Account Policy Account Policy Account Policy Change (Quoted) Personal Auto Indiana Effective: 04/25/2022 Account: Policy Policy Change (Quoted) Policy Change (Quoted) Policy Change (Quoted) Policy Change Quote Policy Change Quote Policy Number Policy Contract Policy Number Policy Contract Policy Number Policy Contract Policy Address TERRE HAUTE, IN 47803-1628 Policy Full Term S1,025.2 Premium Policy Address County VIGO Underwriting Company Peolicy Indiana Residual Market RM 15 Summary Premium Details Cost Change Details Applied Discounts/Surcharges Description Advance Quote Discount Policy Level Discount Policy Level Discount Policy Cuote Policy Level Discount Policy Cuote Policy Level Discount Policy Cuote Policy Cuote Policy Discount
Step 6	
Action	Screen
You have successfully added a Secondary Named Insured to an Auto Policy.	Desktop Account Policy Search Ieam Administration Testing Testing Policy Policy Personal Auto Indiana Effective: 04/25/2022 Account: Policy Policy Control Policy Poli

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Delete a Secondary Named Insured

Step 1

Action	Screen
Open an existing Auto policy.	Desktop Account Policy Search Ieam Administration Testing Testing
 Select the Actions button. 	Account File Policy Contract Policy File Policy Info Create
 Select "Change Policy" from the drop- down menu. 	Drivers Accidents/Violations Accidents/Violations Accidents/Violations Accidents/Violations Accidents/Violations Accidents/Violations Accidents/Violations Bre-Reneval Direction Spin-off Policy from this One Transfer/Rewrite Policy from this One Transfer/Rewrite Policy from this One Coverages New Policy Transaction Change Policy Transfer/Rewrite Policy from this One Coverages Lienholder/Additional Quote Change Policy Producer Code Update Change Policy Change Change Policy Change Change Policy
Step 2	
Action	Screen
 On the Start Policy Change screen the Effective Date field defaults to the current date. If the needed start date is different than the default, enter the necessary information in the Effective Date field. 	Desktop Account Policy Search Ieam Administration Testing Image: Search Account Policy: In Force (Exp. 10/24) Account Policy File Policy Contract Policy Info Otivers Account Policy: In Force (Exp. 10/24) Effective Date # 04/25/2022
• Select the Next > button.	

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Delete a Secondary Named Insured, continued

Step 3

Action	Screen
 On the <i>Policy Info</i> 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. 	Desistop Account Actions Policy Change Policy Contract. Primary Named Insured Drivers Accidents/Violations Vehicles Usage-Based Insurance County Ulage-Based Insurance Coverages Lienholder/Additional Interest Household Composition Are there additional auto Are there additional auto Policy Review
Step 4	
Action	Screen
 The secondary named insured is removed. Quote and Issue the pending Policy Change. 	Desktop Account Policy Search Ieam Administration Testing Actions Policy Change Policy Change Personal Auto Indiana Effective: 04/25/2022 Account: Policy Policy Change Policy Contract <p< td=""></p<>

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