

Add or Delete Secondary Insured – Auto/Property PolicyCenter



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](#).

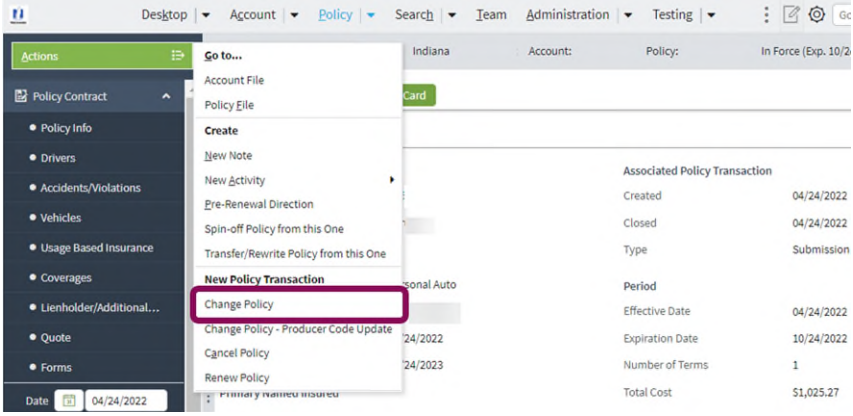
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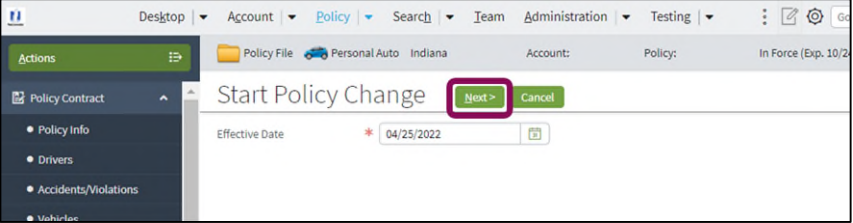


Add a Secondary Named Insured

Step 1

Action	Screen
<p>Open an existing Auto policy.</p> <ul style="list-style-type: none">• Select the Actions button.• Select Change Policy from the drop-down menu.	

Step 2

Action	Screen
<p>On the <i>Start Policy Change</i> screen, the Effective Date field defaults to the current date.</p> <ul style="list-style-type: none">• If the needed start date is different than the default, enter the necessary information in the Effective Date field.• Select the Next > button.	

Add a Secondary Named Insured, continued

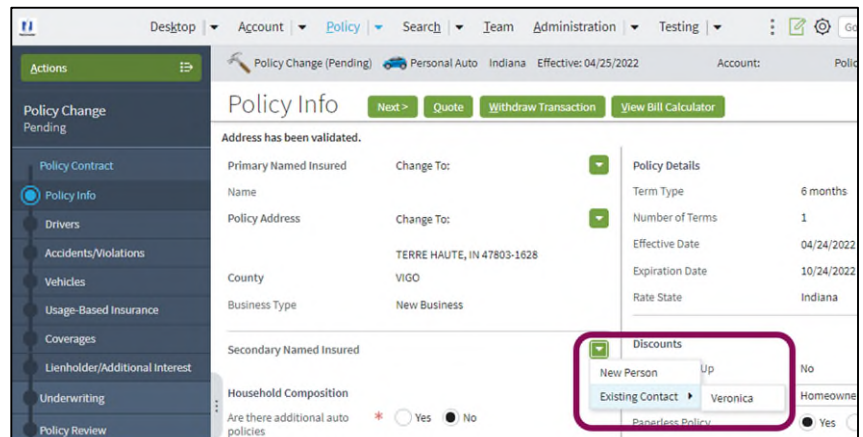
Step 3

Action

On the *Policy Info* 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**.

Screen



The screenshot shows the 'Policy Info' screen with a sidebar on the left containing menu items like 'Policy Contract', 'Policy Info', 'Drivers', etc. The main content area shows 'Policy Change Pending' and 'Address has been validated.' Below this, there are fields for 'Primary Named Insured' (Name, Address, County, Business Type) and 'Secondary Named Insured'. A dropdown menu is open for the 'Secondary Named Insured' field, showing options: 'New Person', 'Existing Contact', and 'Veronica'. The 'Existing Contact' option is selected, and 'Veronica' is displayed to its right. Other fields like 'Term Type', 'Number of Terms', 'Effective Date', 'Expiration Date', and 'Rate State' are also visible.

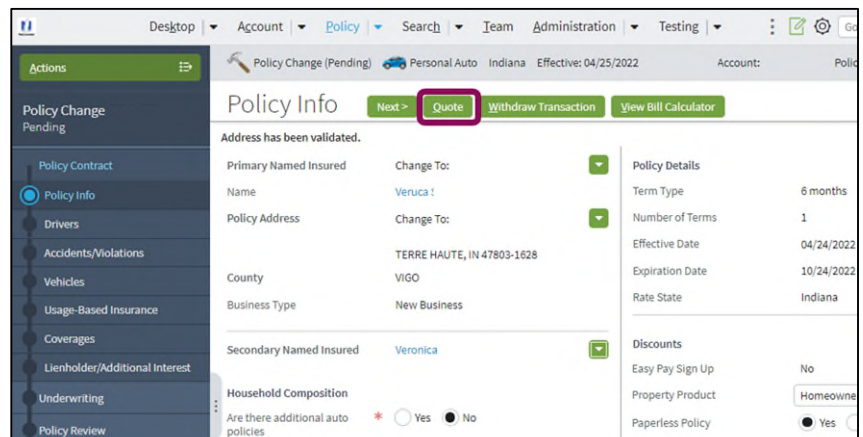
Step 4

Action

The secondary named insured is added.

- Select the **Quote** button.

Screen

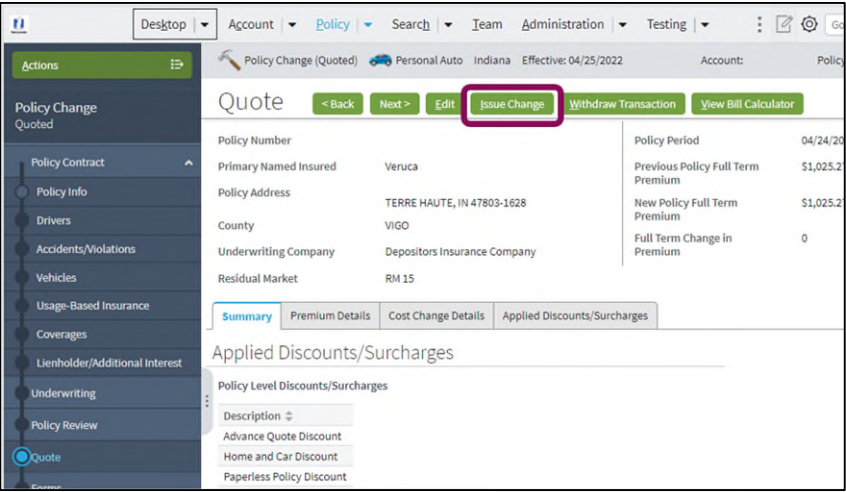


The screenshot shows the 'Policy Info' screen after the secondary named insured has been added. The 'Secondary Named Insured' field now displays 'Veronica'. The 'Quote' button in the top right corner of the main content area is highlighted with a red box. The sidebar and other fields remain the same as in the previous screenshot.

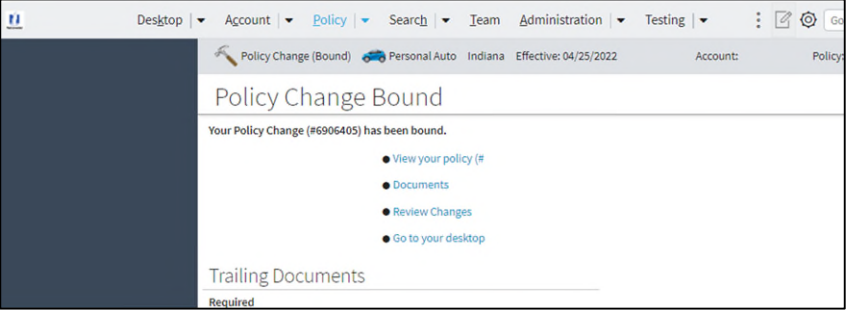


Add a Secondary Named Insured, continued

Step 5

Action	Screen
<p>On the <i>Quote</i> screen:</p> <ul style="list-style-type: none">• Select the Issue Change button.• On the pop-up confirmation window, select the OK button.	

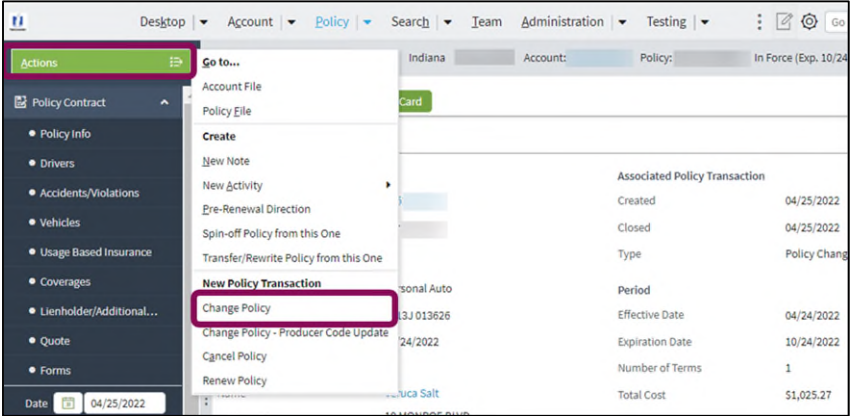
Step 6

Action	Screen
<p>You have successfully added a Secondary Named Insured to an Auto Policy.</p>	

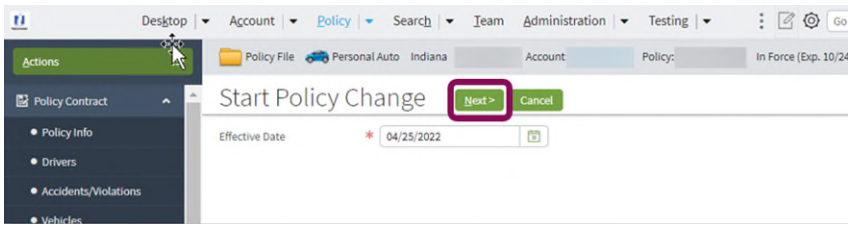
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Delete a Secondary Named Insured

Step 1

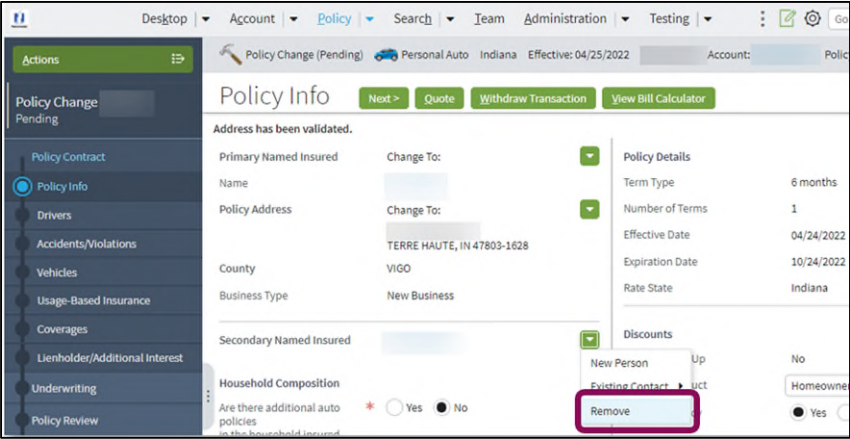
Action	Screen
<p>Open an existing Auto policy.</p> <ul style="list-style-type: none">• Select the Actions button.• Select “Change Policy” from the drop-down menu.	

Step 2

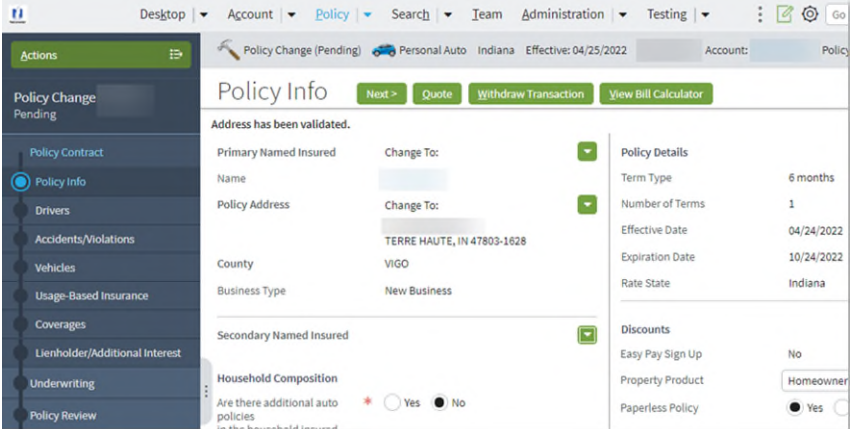
Action	Screen
<p>On the <i>Start Policy Change</i> screen the Effective Date field defaults to the current date.</p> <ul style="list-style-type: none">• If the needed start date is different than the default, enter the necessary information in the Effective Date field.• Select the Next > button.	

Delete a Secondary Named Insured, continued

Step 3

Action	Screen
<p>On the <i>Policy Info</i> screen:</p> <ul style="list-style-type: none">Select the down arrow to the right of the Secondary Named Insured name listed on the policy.Select Remove from the drop-down list.	 <p>The screenshot shows the 'Policy Info' screen in the PolicyCenter application. The left sidebar contains a list of actions: Policy Change (Pending), Policy Contract, Policy Info (selected), Drivers, Accidents/Violations, Vehicles, Usage-Based Insurance, Coverages, Lienholder/Additional Interest, Underwriting, and Policy Review. The main content area displays policy details for a 'Personal Auto' policy in Indiana, effective 04/25/2022. The 'Secondary Named Insured' section shows a dropdown menu with options: 'New Person', 'Existing Contract', 'Up', 'Down', and 'Remove'. The 'Remove' option is highlighted with a red box. Other details include 'Primary Named Insured' name, address, county (VIGO), business type (New Business), term type (6 months), number of terms (1), effective date (04/24/2022), expiration date (10/24/2022), rate state (Indiana), and household composition (Are there additional auto policies in the household insured? Yes/No).</p>

Step 4

Action	Screen
<p>The secondary named insured is removed.</p> <ul style="list-style-type: none">Quote and Issue the pending Policy Change.	 <p>The screenshot shows the 'Policy Info' screen in the PolicyCenter application, similar to the previous one. The 'Secondary Named Insured' section shows a dropdown menu with options: 'New Person', 'Existing Contract', 'Up', 'Down', and 'Remove'. The 'Remove' option is highlighted with a red box. Other details include 'Primary Named Insured' name, address, county (VIGO), business type (New Business), term type (6 months), number of terms (1), effective date (04/24/2022), expiration date (10/24/2022), rate state (Indiana), and household composition (Are there additional auto policies in the household insured? Yes/No).</p>

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