

# Manually Remove an Underlier From an Umbrella Policy

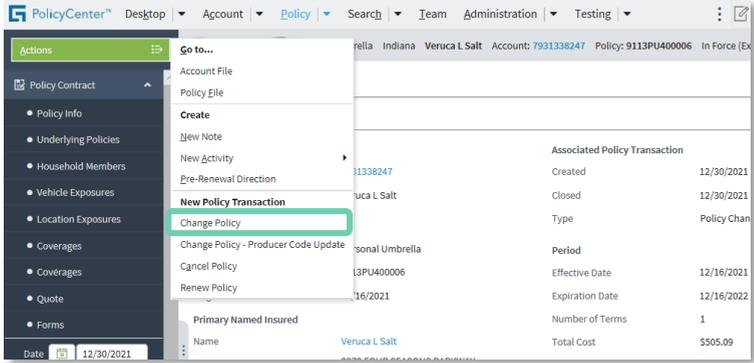
## PolicyCenter



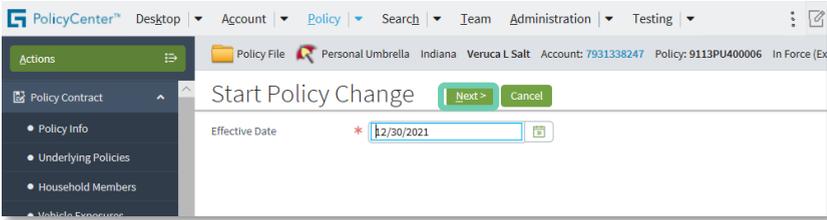
### Description:

This job aid reviews how to manually remove an underlier. The process is the same regardless of which underlier is to be removed.

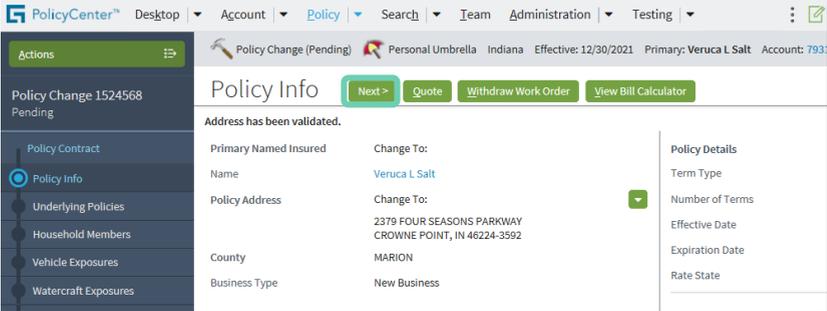
### Step 1

Action	Screen
<p>Navigate to an existing Umbrella policy.</p> <ul style="list-style-type: none"> <li>Click the <b>Actions</b> button.</li> <li>Select <b>“Change Policy”</b> from the drop-down menu.</li> </ul>	

### Step 2

Action	Screen
<p>On the <i>Start Policy Change</i> screen, the <b>Effective Date</b> field defaults to the current date.</p> <ul style="list-style-type: none"> <li>Enter the appropriate information in the <b>Effective Date</b> field.</li> <li>Click the <b>Next &gt;</b> button.</li> </ul>	

### Step 3

Action	Screen
<p>On the <i>Policy Info</i> screen:</p> <ul style="list-style-type: none"> <li>Click the <b>Next &gt;</b> button.</li> </ul>	

### Job Aid Process (Cont.) :

#### Step 4

Action	Screen
<p>On the <i>Underlying Policies</i> screen, you will remove the underlier.</p> <p>In this example, you will remove the Watercraft underlier.</p> <ul style="list-style-type: none"> <li>• Select the checkbox to the left of the underlier to be removed.</li> <li>• Click the <b>Remove Policy</b> button.</li> </ul>	

#### Step 5

Action	Screen
<p>A warning message displays alerting the user that by removing the underlier, all associated exposure information will also be removed.</p> <ul style="list-style-type: none"> <li>• Click the <b>OK</b> button.</li> </ul>	

#### Step 6

Action	Screen
<p>In the <i>Underlying Policies</i> section:</p> <ul style="list-style-type: none"> <li>• Validate the underlier has been removed.</li> <li>• Click the <b>Coverages</b> link.</li> </ul>	

### Job Aid Process (Cont.) :

#### Step 7

Action	Screen
<p>The <i>Validation Results</i> section informs the user Watercraft Liability coverage has been removed.</p> <ul style="list-style-type: none"> <li>Click the <b>Clear</b> button to clear the message.</li> </ul> <p><b>Note:</b> The Watercraft Liability coverage has been removed in the <i>Underlying Coverages</i> section on the <i>Coverages</i> screen.</p> <ul style="list-style-type: none"> <li>Click the <b>Policy Review</b> link, to review the changes to the policy.</li> </ul>	

#### Step 8

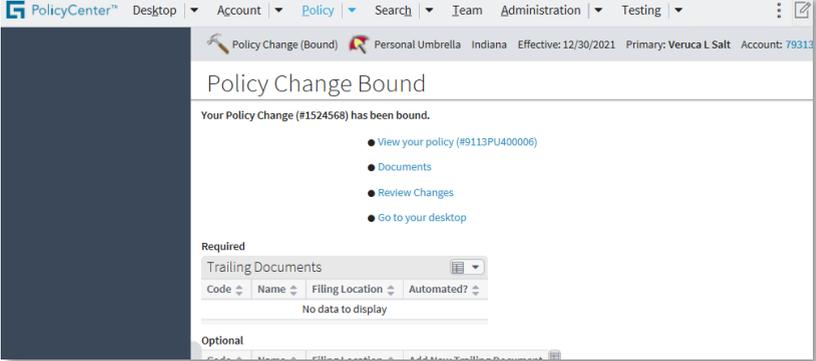
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<p>On the <i>Policy Review</i> screen:</p> <ul style="list-style-type: none"> <li>Click the <b>Quote</b> button.</li> </ul> <p><b>Note:</b> An “x” indicates the line item has been removed from the policy. A check mark indicates the line item has been added to the policy.</p>	<table border="1"> <thead> <tr> <th>Item</th> <th>Existing Policy</th> <th>Preemptions: Policy Change 1524568</th> </tr> </thead> <tbody> <tr> <td><b>Household Members</b></td> <td></td> <td></td> </tr> <tr> <td>Underwriting questions applicable to all household members</td> <td></td> <td></td> </tr> <tr> <td>Do Nationwide underlying policies cover all watercraft?</td> <td>Yes</td> <td></td> </tr> <tr> <td>Will the watercraft be entered in any speed contests?</td> <td>No</td> <td></td> </tr> <tr> <td><b>Underlying Policies</b></td> <td></td> <td></td> </tr> <tr> <td>Watercraft: Nationwide - 9913W 00006</td> <td>✓</td> <td>x</td> </tr> <tr> <td><b>Watercraft Exposures</b></td> <td></td> <td></td> </tr> <tr> <td>Personal Watercraft</td> <td>✓</td> <td>x</td> </tr> </tbody> </table>	Item	Existing Policy	Preemptions: Policy Change 1524568	<b>Household Members</b>			Underwriting questions applicable to all household members			Do Nationwide underlying policies cover all watercraft?	Yes		Will the watercraft be entered in any speed contests?	No		<b>Underlying Policies</b>			Watercraft: Nationwide - 9913W 00006	✓	x	<b>Watercraft Exposures</b>			Personal Watercraft	✓	x
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#### Step 9

Action	Screen												
<p>On the <i>Quote</i> screen:</p> <ul style="list-style-type: none"> <li>Click the <b>Issue Change</b> button.</li> <li>Click the <b>OK</b> button on the confirmation pop-up window.</li> </ul>	<table border="1"> <thead> <tr> <th>Description</th> <th>Amount</th> <th>Eff Date</th> <th>Exp Date</th> <th>Proration</th> <th>Premium</th> </tr> </thead> <tbody> <tr> <td>Umbrella Liability Coverage Details</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Description	Amount	Eff Date	Exp Date	Proration	Premium	Umbrella Liability Coverage Details					
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## Job Aid Process (Cont.) :

### Step 10

Action	Screen
<p>The <i>Policy Change Bound</i> screen displays confirming the binding of the policy change.</p>	

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