



Add, Replace, or Remove a Recreational Vehicle on an Existing Powersports Policy

Description

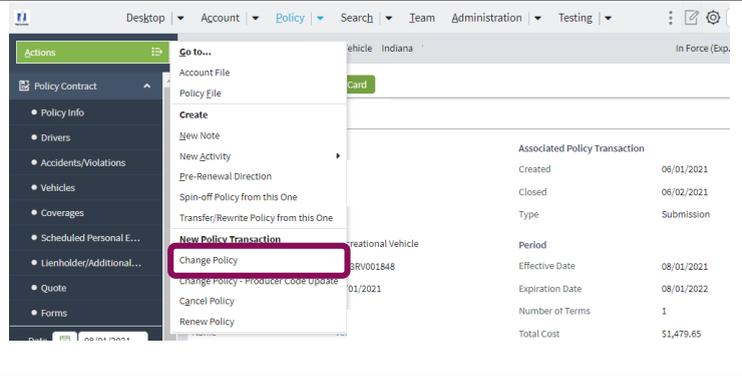
This job aid reviews how to add, replace, or remove a Recreational Vehicle on an existing Powersports policy.

Step 1

Action

- Open an existing Recreational Vehicle (RV) policy:
- Select the "Actions" button.
- Select "Change Policy" from the drop-down menu.

Screen

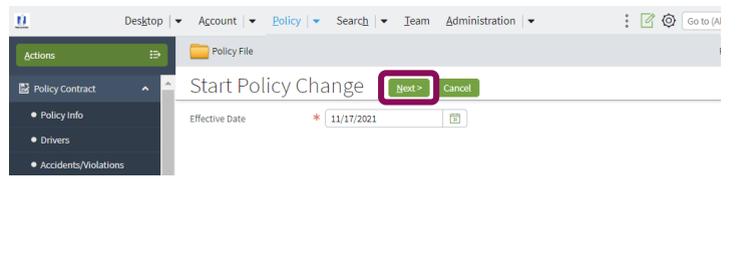


Step 2

Action

- On the "Start Policy Change" screen.
- The "Effective Date" field defaults to today's date. If the customer purchased the RV on a different date, change it to reflect the correct date.
- Select the "Next" button.

Screen

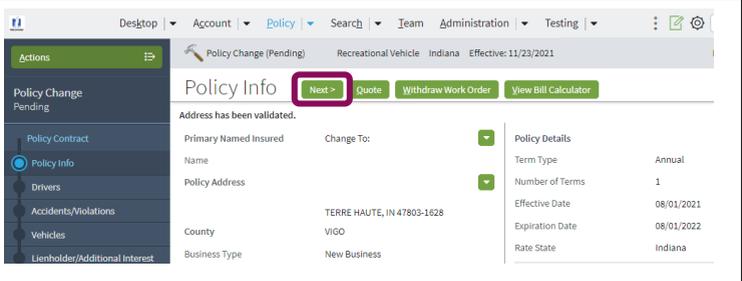


Step 3

Action

- All policy changes start on the "Policy Info" screen.
- If no changes are needed select the "Next" button.

Screen



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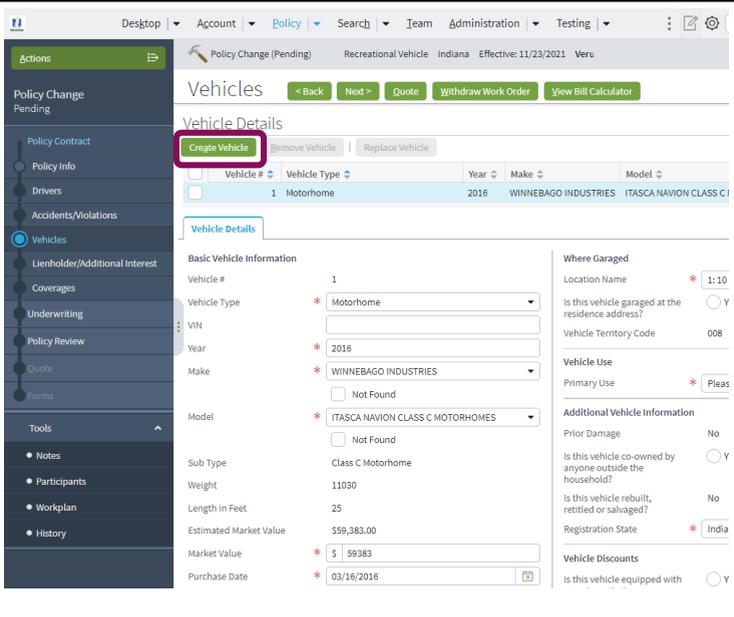


Select the appropriate link from the list below to continue with the policy change.

- [Add a Vehicle](#)
- [Replace a Vehicle](#)
- [Remove a Vehicle](#)

Add a Vehicle

Step 4

Action	Screen
On the "Vehicles" screen: Select the "Create Vehicle" button.	 <p>The screenshot shows the 'Vehicles' screen in a web application. The 'Create Vehicle' button is highlighted with a red box. The screen displays a table with one vehicle entry: Vehicle # 1, Motorhome, 2016, WINNEBAGO INDUSTRIES, ITASCA NAVION CLASS C. Below the table is a 'Vehicle Details' form with fields for Vehicle #, Vehicle Type, VIN, Year, Make, Model, Sub Type, Weight, Length in Feet, Estimated Market Value, Market Value, and Purchase Date. There are also sections for 'Where Garaged', 'Vehicle Use', 'Additional Vehicle Information', and 'Vehicle Discounts'.</p>

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Step 5

Action

In the "Vehicle Details" section:

Complete all required fields. You may need to scroll to view/complete all fields.

Note: VIN look-up services are not available for Powersports Recreational Vehicle policies. You must manually complete all fields.

Complete the "Market Value" and "Purchase Date" fields.

Select the "Next" button.

Screen

The screenshot shows the 'Vehicle Details' screen. The 'Next' button is highlighted with a red box. The 'Vehicle Details' section is also highlighted with a red box, showing fields for Vehicle #, Vehicle Type, Year, Make, Model, Sub Type, Weight, Length in Feet, Estimated Market Value, Market Value, and Purchase Date.

Step 6

Action

On the "Coverages" screen:

Verify all coverages for the added vehicle and update if necessary.

Select the "Next" button.

Screen

The screenshot shows the 'Coverages' screen. The 'Next' button is highlighted with a red box. The screen displays various coverage options and their associated costs.

Step 7

Action

In the "Policy Review" section:

Review the coverage changes for the revised policy. If changes need to be made, select the "Back" button and make revisions.

If everything is correct select the "Quote" button.

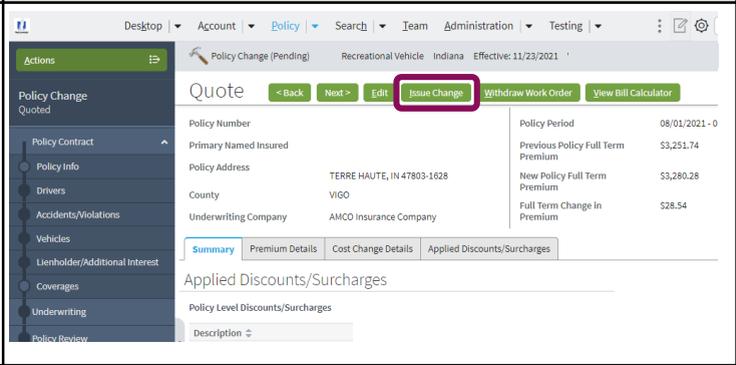
Screen

The screenshot shows the 'Policy Review' screen. The 'Quote' button is highlighted with a red box. The screen displays a comparison of the existing policy and the proposed policy change.

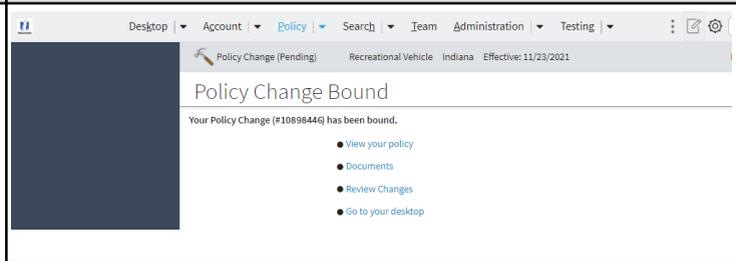
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Step 8

Action	Screen
<p>On the "Quote" screen:</p> <p>Select the "Issue Change" button.</p> <p>Select the "OK" button on the "Issue Change" pop-up window after reviewing the disclosure statement.</p>	

Step 9

Action	Screen
<p>The "Policy Change Bound" screen displays. This indicates the change is bound.</p>	



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Replace a Vehicle

Step 4

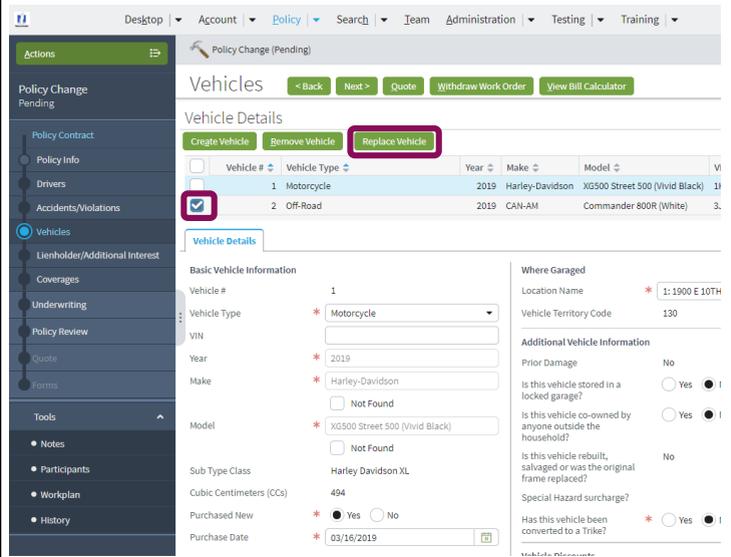
Action

On the “Vehicles” screen:

Select the checkbox to the left of the Vehicle # which needs to be replaced.

Select the “Replace Vehicle” button.

Screen



Step 5

Action

In the “Vehicle Details” section:

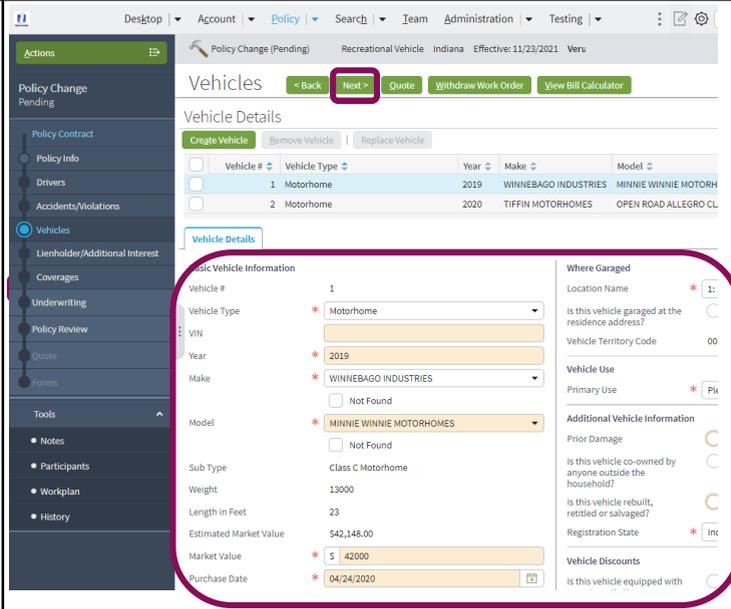
Complete all required fields. You may need to scroll to view/complete all fields.

Note: VIN look-up services are not available for Powersports Recreational Vehicles policies. You must manually complete all fields.

Complete the “Market Value” and “Purchase Date” fields.

Select the “Next” button.

Screen



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Step 6

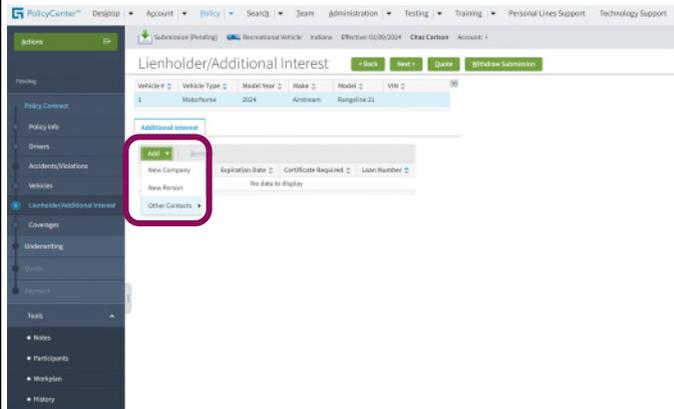
Action

If the policyholder has a lienholder complete Steps 6-8, if not, select the “Next” button and move to Step 9.

Select the “Add” button.

Select “New Company” from the drop-down.

Screen



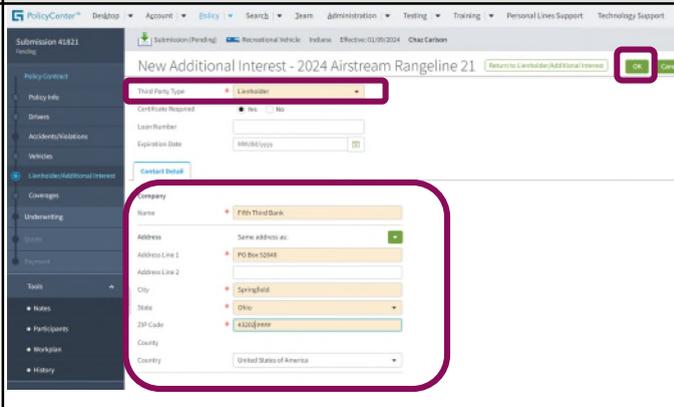
Step 7

Action

On the “New Additional Interest” screen, select the “Third Party Type” and complete the “Contact Detail” section.

When finished, select “OK.”

Screen



Step 8

Action

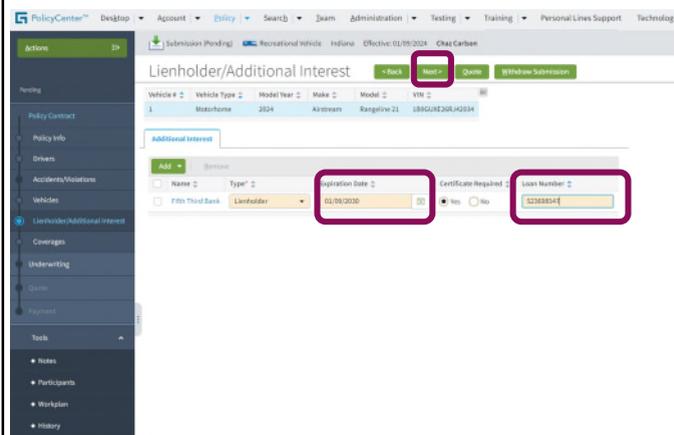
You will return to the “Lienholder/Additional Interest” screen.

If the information is available, fill in the “Expiration Date” and “Loan Number.”

NOTE: The Expiration Date and Loan Number are not required but helpful to aid in future inquiries.

Select “Next” to move on to “Coverages.”

Screen



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Step 9

Action	Screen
<p>On the “Coverages” screen:</p> <p>Verify all coverages for the replacement vehicle and update if necessary.</p> <p>Select the “Next” button.</p>	

Step 10

Action	Screen
<p>In the “Policy Review” section:</p> <p>Review the coverage changes for the revised policy.</p> <p>If changes need to be made, select the “Back” button and make revisions.</p> <p>If everything is correct, select the “Quote” button.</p>	

Step 11

Action	Screen
<p>On the “Quote” screen:</p> <p>Select the “Issue Change” button.</p> <p>Select the “OK” button on the “Issue Change” pop-up window after reviewing the disclosure statement.</p>	

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Step 12

Action	Screen
<p>The "Policy Change Bound" screen displays. This indicates the change is bound.</p>	



Remove a Vehicle

Step 4

Action	Screen
<p>On the "Vehicles" screen:</p> <p>Select the checkbox to the left of the Vehicle # to be removed.</p> <p>Select the "Remove Vehicle" button.</p> <p>Select the "Next" button.</p>	

Step 5

Action	Screen
<p>If applicable, verify the Lienholder has been removed.</p> <p>Select the "Next" button.</p>	

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Step 6

Action

After removing the vehicle:

Select the “Coverages” link to ensure the coverages have also been removed.

Once you have verified the coverages have been removed, select “Next.”

Screen

Vehicles < Back Next Quote Withdraw Work Order View Bill Calculator

Vehicle Details

Create Vehicle Remove Vehicle Replace Vehicle

Vehicle #	Vehicle Type	Year	Make	Model
2	Motorhome	2020	TIFFIN MOTORHOMES	OPEN ROAD ALLEGRO CLASS

Vehicle Details

Basic Vehicle Information

Vehicle # 2

Vehicle Type * Motorhome

WIN

Year * 2020

Make * TIFFIN MOTORHOMES

Not Found

Model * OPEN ROAD ALLEGRO CLASS A MOTORHOMES

Not Found

Sub Type Class A Motorhome

Weight 22000

Length in Feet 34

Estimated Market Value \$147,161.00

Market Value * \$ 147000

Purchase Date * 03/16/2020

Where Garaged

Location Name * 1:

Is this vehicle garaged at the residence address?

Vehicle Territory Code 00

Vehicle Use

Primary Use * Pi

Additional Vehicle Information

Prior Damage

Is this vehicle co-owned by anyone outside the household?

Is this vehicle rebuilt, retitled or salvaged?

Registration State * Int

Vehicle Discounts

Is this vehicle equipped with

Coverages < Back Next Quote Withdraw Work Order View Bill Calculator

Coverages Rating Factors

Transaction Effective Date -

Total Pro-Rated Premium -

Fees -

Taxes & Surcharges -

Total Pro-Rated Cost -

Pro-Rated Change in Cost -

Policy-level Coverages Features

Description	Term Amount	Description

Step 7

Action

In the “Policy Review” section:

Review the coverage changes for the revised policy.

If changes need to be made, select the “Back” button and make revisions.

If everything is correct, select the “Quote” button.

Screen

Policy Review < Back Quote Withdraw Work Order View Bill Calculator

Differences

Comparing Existing Policy and Policy Change: 11069837

Item	Existing Policy	Policy Change: 11069837
2019 WINNEBAGO INDUSTRIES MINNIE WINNIE MOTORHOMES	√	x
Coverages		
Bodily Injury	√	x
Collision	√	x
Comprehensive	√	x
Medical Payments	√	x
Physical Damage Settlement	√	

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Step 8

Action	Screen
<p>On the "Quote" screen:</p> <p>Select the "Issue Change" button.</p> <p>Select the "OK" button on the Issue Change pop-up window after reviewing the disclosure statement.</p>	

Step 9

Action	Screen
<p>The Policy Change Bound screen displays. This indicates the change is bound.</p>	



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