Forms Experts Program

Domain Name: Named Driver Exclusion Endorsement

Document Control Information

Document Information

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1. Functional Domain

Named Driver Exclusion Endorsement

2. Business Justification

Motor vehicles are often operated by residents of a named insured's household other than the insured himself or herself, the driving records of such household members may create difficulties for the insured in obtaining auto insurance coverage for a car or truck. Named driver exclusions in motor vehicle insurance policies have been devised as a means of resolving this difficulty.

A named driver exclusion in a policy of auto insurance is a provision by which an insurer and insured agree that coverage under the policy will not be provided while the insured vehicle is being operated by a specifically named person.

**Does an excluded driver affect the cost of insurance?**

Having a driver listed as excluded on your car insurance policy could cost more when compared to not having the driver listed anywhere on your policy. Even though the driver is excluded from coverage, usually they are still eligible for medical. And as a member of your household the medical coverage for automobile insurance costs extra depending on what coverage you have selected on your policy.

**What happens if an excluded driver drives my car?**

Excluded drivers should never drive the vehicle in which they are excluded from. It is the same as driving with no insurance. If an accident occurs, both the owner of the vehicle and the excluded driver could be held personally liable for damages.

**How do I know if a driver is excluded?**

Drivers cannot be excluded without the named insured’s permission. To authorize an excluded driver your signature is required on a driver exclusion form.

**Some key points for Named Driver Exclusion are**

* Any person may be excluded from coverage except a named insured or an individual requesting an SR-22 filing from AAA Insurance.
* Drivers cannot be excluded from specific vehicles on a policy.
* The Named Driver Exclusion form must be signed by the named insured (and spouse, if spouse is excluded)
* A signed Named Driver Exclusion form may be required when deleting a driver from the policy

3. List of forms covered under the domain

| Form No. | State initials | Form Name |
| --- | --- | --- |
| AA43MT | MT | Named Driver Exclusion Endorsement |
| AA43WY | WY | Named Driver Exclusion Endorsement |
| AA43MD | MD | Named Driver Exclusion Endorsement |
| AA43PA | PA | Named Driver Exclusion Endorsement |
| AA43NJ | NJ | Named Driver Exclusion Endorsement |
| AA43NY | NY | Named Driver Exclusion Endorsement |
| AA43DE | DE | Named Driver Exclusion Endorsement |
| AA43CT | CT | Named Driver Exclusion Endorsement |
| AA43KY | KY | Named Driver Exclusion Endorsement |
| AA43DC | DC | Named Driver Exclusion Endorsement |
| AA43ID | ID | Named Driver Exclusion Endorsement |

* 1. Analysis of Business Requirements

## Common Requirements

*N/A*

## State-specific Requirements (if any)

The form contains the names of the Excluded drivers,their relationship with Named Insured, definition of Excluded driver and signature line.

| Form No. | State initials | Form Name | Form Description and its Business Use |
| --- | --- | --- | --- |
| AA43MT | MT | Named Driver Exclusion Endorsement | * This document contains the list of Excluded drivers,their relationship with Named Insured, * Definition and conditions related to Driver Exclusion * Signature Line for Named Insured * Signature Line for Parent or Legal Guardian * Signed form needs to submitted to Exclude drvier(s) |
| AA43WY | WY | Named Driver Exclusion Endorsement | * This document contains the list of Excluded drivers,their relationship with Named Insured, * Definition and conditions related to Driver Exclusion * Signature Line for Named Insured * Signature Line for Parent or Legal Guardian   Signed form needs to submitted to Exclude drvier(s) |
| AA43MD | MD | Named Driver Exclusion Endorsement | * This document contains the list of Excluded drivers,their relationship with Named Insured, * Definition and conditions related to Driver Exclusion * Signature Line for Named Insured * Signature Line for Parent or Legal Guardian * Signed form needs to submitted to Exclude drvier(s) |
| AA43PA | PA | Named Driver Exclusion Endorsement | * This document contains the list of Excluded drivers,their relationship with Named Insured, * Definition and conditions related to Driver Exclusion * Signature Line for Named Insured * Signature Line for Parent or Legal Guardian * Signed form needs to submitted to Exclude drvier(s) |
| AA43NJ | NJ | Named Driver Exclusion Endorsement | * This document contains the list of Excluded drivers,their relationship with Named Insured, * Definition and conditions related to Driver Exclusion * Signature Line for Named Insured * Signature Line for Parent or Legal Guardian * Signed form needs to submitted to Exclude drvier(s) |
| AA43NY | NY | Named Driver Exclusion Endorsement | * This document contains the list of Excluded drivers,their relationship with Named Insured, * Definition and conditions related to Driver Exclusion * Signature Line for Named Insured * Signature Line for Parent or Legal Guardian * Signed form needs to submitted to Exclude drvier(s) |
| AA43DE | DE | Named Driver Exclusion Endorsement | * This document contains the list of Excluded drivers,their relationship with Named Insured, * Definition and conditions related to Driver Exclusion * Signature Line for Named Insured * Signature Line for Parent or Legal Guardian * Signed form needs to submitted to Exclude drvier(s) |
| AA43CT | CT | Named Driver Exclusion Endorsement | * This document contains the list of Excluded drivers,their relationship with Named Insured, * Definition and conditions related to Driver Exclusion * Signature Line for Named Insured * Signature Line for Parent or Legal Guardian * Signed form needs to submitted to Exclude drvier(s) |
| AA43KY | KY | Named Driver Exclusion Endorsement | * This document contains the list of Excluded drivers,their relationship with Named Insured, * Definition and conditions related to Driver Exclusion * Signature Line for Named Insured * Signature Line for Parent or Legal Guardian * Static Signature Line for Authorized Representative * Signed form needs to submitted to Exclude drvier(s) |
| AA43DC | DC | Named Driver Exclusion Endorsement | * This document contains the list of Excluded drivers,their relationship with Named Insured, * Definition and conditions related to Driver Exclusion * Signature Line for Named Insured * Signature Line for Parent or Legal Guardian * Signed form needs to submitted to Exclude drvier(s) |
| AA43ID | ID | Named Driver Exclusion Endorsement | * This document contains the list of Excluded drivers,their relationship with Named Insured, * Definition and conditions related to Driver Exclusion * Signature Line for Named Insured * Signature Line for Parent or Legal Guardian * Signed form needs to submitted to Exclude drvier(s) |

## Related Change Requests

N/A

* 1. Key Understanding of Design requirements, (form wise)

## AA43MT Named Driver Exclusion Endorsement

### System/UI Impact

| Page | Yes/No | Page Section |
| --- | --- | --- |
| Forms | | Yes | * Driver Forms section | |
| Documents | | No | * Required to Bind Section * Default button selected is “Not Signed” * Document Available for Printing section * Default button is “Yes” | |
| GODD | | No | * Present is “Quote consolidated view” and “Policy consolidated view” | |
| Related UW Rule/Task | | No | * UW Rule 200034/Task 200034T related if Document value is “Not Signed” in “Required to Bind” section fo ‘Documents Page’ | |

### Impacted Stories

| Type | Story # *(enter story # or N/A if form doesn’t require update to state specific story. Any legacy EKM story #s within the listed combo templates should be included in the story writing analysis)* |
| --- | --- |
| Form Content & Triggers | 880-253MT Form Content and Triggers - Named Driver Exclusion Endorsement   * 880-253MT - Documents - New Business - Named Driver Exclusion Endorsement * 880-210MT - Documents -Endorsement - Named Driver Exclusion Endorsement * 880-411MT - Renewal Documents - Document - Named Driver Exclusion Endorsement |
| Documents Page | 880-830MT Consolidated Form Stories - Document Page   * 880-024MT - Documents page - Business Rules - Required for bind section * 880-023MT - Documents Page – Business Rules – Documents available for printing section * 880-030MT - Documents Page - Continue Button Rules * 880-029MT - Tasks and Override Rules * 580-028MT - Override Rules - Documents Page |
| GODD Page | 880-840MT Consolidated Form Stories - GODD Page   * 880-220MT - Documents appearing on GODD page * 880-221MT - Available documents-Business rules * 880-103MT - Documents- Generate on Demand Documents - Named Driver Exclusion Form |
| Forms Page | 880-820MT Forms Page Combo US-VC Template   * 070-243MT - Forms Page – Forms Impacted by Driver Rule |
| RFI | 880-860MT Consolidated Form Stories – RFI   * 880-063MT - RFI Document Production - Named Driver Exclusion |
| Packet/Print Story | 880-880MT Consolidated Form Stories - PRINTED Forms - Packets - Sequence - DCS mapping - BFC specs   * 880-239MT - New Business * 880-199MT - Endorsement |

### Signature Rules(if any)

* This is a signature form. “SIGNATURE ON FILE” should automatically print on signature line if insured has signed a copy at time of bind

### Document Content and Applicable Triggers

* **@Bind** – If the driver type is “Excluded” then this form is generated for Signature
* **@ New Business**

- If driver type is “Excluded” then system generates as part of “New Business”.

- Form number prints on New Business DEC page in FORMS & ENDORSEMENT section

- “SIGNATURE ON FILE” should automatically print on signature line if insured has signed a copy

at time of bind

- Parent signature line is printed if the Named Insured age is less than 18 years

* **@Amendment**

- If driver type “Excluded” is selected via a mid-term endorsement transaction system generates form as part of the Amendment packet.

- Form number prints on Amended DEC in the FORMS & ENDORSEMENT section

- If there is already an existing “excluded” driver on the policy and an additional “excluded” driver is added then a new form will system generate listing all “excluded drivers” and be part of the Amendment packet.

- If an “excluded” driver is deleted and there remains “excluded” driver(s) then a new form will system generate as part of the Amendment packet

- If all “excluded” drivers are deleted, the form will no longer apply

* **@Renewal**

- Form number must print on Renewal DEC page in the FORMS & ENDORSEMENT section if condition “Excluded” drivers still exists

- Form does not generate and is not part of the renewal offer packet **Document Content**

### Key pointers to keep in mind

* The form is not generated if there are no exluded drivers

## AA43WY Named Driver Exclusion Endorsement

### System/UI Impact

| Page | Yes/No | Page Section |
| --- | --- | --- |
| Forms | | Yes | * Driver Forms section | |
| Documents | | No | * Required to Bind Section * Default button selected is “Not Signed” * Document Available for Printing section * Default button is “Yes” | |
| GODD | | No | * Present is “Quote consolidated view” and “Policy consolidated view” | |
| Related UW Rule/Task | | No | * UW Rule 200034/Task 200034T related if Document value is “Not Signed” in “Required to Bind” section fo ‘Documents Page’ | |

### Impacted Stories

| Type | Story # *(enter story # or N/A if form doesn’t require update to state specific story. Any legacy EKM story #s within the listed combo templates should be included in the story writing analysis)* |
| --- | --- |
| Form Content & Triggers | 880-253WY Form Content and Triggers - Named Driver Exclusion Endorsement   * 880-253WY - Documents - New Business - Named Driver Exclusion Endorsement * 880-210WY - Documents -Endorsement - Named Driver Exclusion Endorsement * 880-411WY - Renewal Documents - Document - Named Driver Exclusion Endorsement |
| Documents Page | 880-830WY Consolidated Form Stories - Document Page   * 880-024WY - Documents page - Business Rules - Required for bind section * 880-023WY - Documents Page – Business Rules – Documents available for printing section * 880-030WY - Documents Page - Continue Button Rules * 880-029WY - Tasks and Override Rules * 580-028WY - Override Rules - Documents Page |
| GODD Page | 880-840WY Consolidated Form Stories - GODD Page   * 880-220WY - Documents appearing on GODD page * 880-221WY - Available documents-Business rules * 880-103WY - Documents- Generate on Demand Documents - Named Driver Exclusion Form |
| Forms Page | 880-820WY Forms Page Combo US-VC Template   * 070-243WY - Forms Page – Forms Impacted by Driver Rule |
| RFI | 880-860WY Consolidated Form Stories – RFI   * 880-063WY - RFI Document Production - Named Driver Exclusion |
| Packet/Print Story | 880-880WY Consolidated Form Stories - PRINTED Forms - Packets - Sequence - DCS mapping - BFC specs   * 880-239WY - New Business * 880-199WY - Endorsement |

### Signature Rules(if any)

* This is a signature form. “SIGNATURE ON FILE” should automatically print on signature line if insured has signed a copy at time of bind

### Document Content and Applicable Triggers

* **@Bind** – If the driver type is “Excluded” then this form is generated for Signature
* **@ New Business**

- If driver type is “Excluded” then system generates as part of “New Business”.

- Form number prints on New Business DEC page in FORMS & ENDORSEMENT section

- “SIGNATURE ON FILE” should automatically print on signature line if insured has signed a copy

at time of bind

- Parent signature line is printed if the Named Insured age is less than 18 years

* **@Amendment**

- If driver type “Excluded” is selected via a mid-term endorsement transaction system generates form as part of the Amendment packet.

- Form number prints on Amended DEC in the FORMS & ENDORSEMENT section

- If there is already an existing “excluded” driver on the policy and an additional “excluded” driver is added then a new form will system generate listing all “excluded drivers” and be part of the Amendment packet.

- If an “excluded” driver is deleted and there remains “excluded” driver(s) then a new form will system generate as part of the Amendment packet

- If all “excluded” drivers are deleted, the form will no longer apply

* **@Renewal**

- Form number must print on Renewal DEC page in the FORMS & ENDORSEMENT section if condition “Excluded” drivers still exists

- Form does not generate and is not part of the renewal offer packet **Document Content**

### Key pointers to keep in mind

* The form is not generated if there are no exluded drivers

## AA43MD Named Driver Exclusion Endorsement

### System/UI Impact

| Page | Yes/No | Page Section |
| --- | --- | --- |
| Forms | | Yes | * Driver Forms section | |
| Documents | | No | * Required to Bind Section * Default button selected is “Not Signed” * Document Available for Printing section * Default button is “Yes” | |
| GODD | | No | * Present is “Quote consolidated view” and “Policy consolidated view” | |
| Related UW Rule/Task | | No | * UW Rule 200034/Task 200034T related if Document value is “Not Signed” in “Required to Bind” section fo ‘Documents Page’ | |

### Impacted Stories

| Type | Story # *(enter story # or N/A if form doesn’t require update to state specific story. Any legacy EKM story #s within the listed combo templates should be included in the story writing analysis)* |
| --- | --- |
| Form Content & Triggers | 880-253MD Form Content and Triggers - Named Driver Exclusion Endorsement   * 880-253MD - Documents - New Business - Named Driver Exclusion Endorsement * 880-210MD - Documents -Endorsement - Named Driver Exclusion Endorsement * 880-411MD - Renewal Documents - Document - Named Driver Exclusion Endorsement |
| Documents Page | 880-830MD Consolidated Form Stories - Document Page   * 880-024MD - Documents page - Business Rules - Required for bind section * 880-023MD - Documents Page – Business Rules – Documents available for printing section * 880-030MD - Documents Page - Continue Button Rules * 880-029MD - Tasks and Override Rules * 580-028MD - Override Rules - Documents Page |
| GODD Page | 880-840MD Consolidated Form Stories - GODD Page   * 880-220MD - Documents appearing on GODD page * 880-221MD - Available documents-Business rules * 880-103MD - Documents- Generate on Demand Documents - Named Driver Exclusion Form |
| Forms Page | 880-820MD Forms Page Combo US-VC Template   * 070-243MD - Forms Page – Forms Impacted by Driver Rule |
| RFI | 880-860MD Consolidated Form Stories – RFI   * 880-063MD - RFI Document Production - Named Driver Exclusion |
| Packet/Print Story | 880-880MD Consolidated Form Stories - PRINTED Forms - Packets - Sequence - DCS mapping - BFC specs   * 880-239MD - New Business * 880-199MD - Endorsement |

### Signature Rules(if any)

* This is a signature form. “SIGNATURE ON FILE” should automatically print on signature line if insured has signed a copy at time of bind

### Document Content and Applicable Triggers

* **@Bind** – If the driver type is “Excluded” then this form is generated for Signature
* **@ New Business**

- If driver type is “Excluded” then system generates as part of “New Business”.

- Form number prints on New Business DEC page in FORMS & ENDORSEMENT section

- “SIGNATURE ON FILE” should automatically print on signature line if insured has signed a copy

at time of bind

- Parent signature line is printed if the Named Insured age is less than 18 years

* **@Amendment**

- If driver type “Excluded” is selected via a mid-term endorsement transaction system generates form as part of the Amendment packet.

- Form number prints on Amended DEC in the FORMS & ENDORSEMENT section

- If there is already an existing “excluded” driver on the policy and an additional “excluded” driver is added then a new form will system generate listing all “excluded drivers” and be part of the Amendment packet.

- If an “excluded” driver is deleted and there remains “excluded” driver(s) then a new form will system generate as part of the Amendment packet

- If all “excluded” drivers are deleted, the form will no longer apply

* **@Renewal**

- Form number must print on Renewal DEC page in the FORMS & ENDORSEMENT section if condition “Excluded” drivers still exists

- Form does not generate and is not part of the renewal offer packet **Document Content**

### Key pointers to keep in mind

* The form is not generated if there are no exluded drivers

## AA43PA Named Driver Exclusion Endorsement

### System/UI Impact

| Page | Yes/No | Page Section |
| --- | --- | --- |
| Forms | | Yes | * Driver Forms section | |
| Documents | | No | * Required to Bind Section * Default button selected is “Not Signed” * Document Available for Printing section * Default button is “Yes” | |
| GODD | | No | * Present is “Quote consolidated view” and “Policy consolidated view” | |
| Related UW Rule/Task | | No | * UW Rule 200034/Task 200034T related if Document value is “Not Signed” in “Required to Bind” section fo ‘Documents Page’ | |

### Impacted Stories

| Type | Story # *(enter story # or N/A if form doesn’t require update to state specific story. Any legacy EKM story #s within the listed combo templates should be included in the story writing analysis)* |
| --- | --- |
| Form Content & Triggers | 880-253PA Form Content and Triggers - Named Driver Exclusion Endorsement   * 880-253PA - Documents - New Business - Named Driver Exclusion Endorsement * 880-210PA - Documents -Endorsement - Named Driver Exclusion Endorsement * 880-411PA - Renewal Documents - Document - Named Driver Exclusion Endorsement |
| Documents Page | 880-830PA Consolidated Form Stories - Document Page   * 880-024PA - Documents page - Business Rules - Required for bind section * 880-023PA - Documents Page – Business Rules – Documents available for printing section * 880-030PA - Documents Page - Continue Button Rules * 880-029PA - Tasks and Override Rules * 580-028PA - Override Rules - Documents Page |
| GODD Page | 880-840PA Consolidated Form Stories - GODD Page   * 880-220PA - Documents appearing on GODD page * 880-221PA - Available documents-Business rules * 880-103PA - Documents- Generate on Demand Documents - Named Driver Exclusion Form |
| Forms Page | 880-820PA Forms Page Combo US-VC Template   * 070-243PA - Forms Page – Forms Impacted by Driver Rule |
| RFI | 880-860PA Consolidated Form Stories – RFI   * 880-063PA - RFI Document Production - Named Driver Exclusion |
| Packet/Print Story | 880-880PA Consolidated Form Stories - PRINTED Forms - Packets - Sequence - DCS mapping - BFC specs   * 880-239PA - New Business * 880-199PA - Endorsement |

### Signature Rules(if any)

* This is a signature form. “SIGNATURE ON FILE” should automatically print on signature line if insured has signed a copy at time of bind

### Document Content and Applicable Triggers

* **@Bind** – If the driver type is “Excluded” then this form is generated for Signature
* **@ New Business**

- If driver type is “Excluded” then system generates as part of “New Business”.

- Form number prints on New Business DEC page in FORMS & ENDORSEMENT section

- “SIGNATURE ON FILE” should automatically print on signature line if insured has signed a copy

at time of bind

- Parent signature line is printed if the Named Insured age is less than 18 years

* **@Amendment**

- If driver type “Excluded” is selected via a mid-term endorsement transaction system generates form as part of the Amendment packet.

- Form number prints on Amended DEC in the FORMS & ENDORSEMENT section

- If there is already an existing “excluded” driver on the policy and an additional “excluded” driver is added then a new form will system generate listing all “excluded drivers” and be part of the Amendment packet.

- If an “excluded” driver is deleted and there remains “excluded” driver(s) then a new form will system generate as part of the Amendment packet

- If all “excluded” drivers are deleted, the form will no longer apply

* **@Renewal**

- Form number must print on Renewal DEC page in the FORMS & ENDORSEMENT section if condition “Excluded” drivers still exists

- Form does not generate and is not part of the renewal offer packet **Document Content**

### Key pointers to keep in mind

* The form is not generated if there are no exluded drivers

## AA43NJ Named Driver Exclusion Endorsement

### System/UI Impact

| Page | Yes/No | Page Section |
| --- | --- | --- |
| Forms | | Yes | * Driver Forms section | |
| Documents | | No | * Required to Bind Section * Default button selected is “Not Signed” * Document Available for Printing section * Default button is “Yes” | |
| GODD | | No | * Present is “Quote consolidated view” and “Policy consolidated view” | |
| Related UW Rule/Task | | No | * UW Rule 200034/Task 200034T related if Document value is “Not Signed” in “Required to Bind” section fo ‘Documents Page’ | |

### Impacted Stories

| Type | Story # *(enter story # or N/A if form doesn’t require update to state specific story. Any legacy EKM story #s within the listed combo templates should be included in the story writing analysis)* |
| --- | --- |
| Form Content & Triggers | 880-253NJ Form Content and Triggers - Named Driver Exclusion Endorsement   * 880-253NJ - Documents - New Business - Named Driver Exclusion Endorsement * 880-210NJ - Documents -Endorsement - Named Driver Exclusion Endorsement * 880-411NJ - Renewal Documents - Document - Named Driver Exclusion Endorsement |
| Documents Page | 880-830NJ Consolidated Form Stories - Document Page   * 880-024NJ - Documents page - Business Rules - Required for bind section * 880-023NJ - Documents Page – Business Rules – Documents available for printing section * 880-030NJ - Documents Page - Continue Button Rules * 880-029NJ - Tasks and Override Rules * 580-028NJ - Override Rules - Documents Page |
| GODD Page | 880-840NJ Consolidated Form Stories - GODD Page   * 880-220NJ - Documents appearing on GODD page * 880-221NJ - Available documents-Business rules * 880-103NJ - Documents- Generate on Demand Documents - Named Driver Exclusion Form |
| Forms Page | 880-820NJ Forms Page Combo US-VC Template   * 070-243NJ - Forms Page – Forms Impacted by Driver Rule |
| RFI | 880-860NJ Consolidated Form Stories – RFI   * 880-063NJ - RFI Document Production - Named Driver Exclusion |
| Packet/Print Story | 880-880NJ Consolidated Form Stories - PRINTED Forms - Packets - Sequence - DCS mapping - BFC specs   * 880-239NJ - New Business * 880-199NJ - Endorsement |

### Signature Rules(if any)

* This is a signature form. “SIGNATURE ON FILE” should automatically print on signature line if insured has signed a copy at time of bind

### Document Content and Applicable Triggers

* **@Bind** – If the driver type is “Excluded” then this form is generated for Signature
* **@ New Business**

- If driver type is “Excluded” then system generates as part of “New Business”.

- Form number prints on New Business DEC page in FORMS & ENDORSEMENT section

- “SIGNATURE ON FILE” should automatically print on signature line if insured has signed a copy

at time of bind

- Parent signature line is printed if the Named Insured age is less than 18 years

* **@Amendment**

- If driver type “Excluded” is selected via a mid-term endorsement transaction system generates form as part of the Amendment packet.

- Form number prints on Amended DEC in the FORMS & ENDORSEMENT section

- If there is already an existing “excluded” driver on the policy and an additional “excluded” driver is added then a new form will system generate listing all “excluded drivers” and be part of the Amendment packet.

- If an “excluded” driver is deleted and there remains “excluded” driver(s) then a new form will system generate as part of the Amendment packet

- If all “excluded” drivers are deleted, the form will no longer apply

* **@Renewal**

- Form number must print on Renewal DEC page in the FORMS & ENDORSEMENT section if condition “Excluded” drivers still exists

- Form does not generate and is not part of the renewal offer packet **Document Content**

### Key pointers to keep in mind

* The form is not generated if there are no exluded drivers

## AA43NY Named Driver Exclusion Endorsement

### System/UI Impact

| Page | Yes/No | Page Section |
| --- | --- | --- |
| Forms | | Yes | * Driver Forms section | |
| Documents | | No | * Required to Bind Section * Default button selected is “Not Signed” * Document Available for Printing section * Default button is “Yes” | |
| GODD | | No | * Present is “Quote consolidated view” and “Policy consolidated view” | |
| Related UW Rule/Task | | No | * UW Rule 200034/Task 200034T related if Document value is “Not Signed” in “Required to Bind” section fo ‘Documents Page’ | |

### Impacted Stories

| Type | Story # *(enter story # or N/A if form doesn’t require update to state specific story. Any legacy EKM story #s within the listed combo templates should be included in the story writing analysis)* |
| --- | --- |
| Form Content & Triggers | 880-253NY Form Content and Triggers - Named Driver Exclusion Endorsement   * 880-253NY - Documents - New Business - Named Driver Exclusion Endorsement * 880-210NY - Documents -Endorsement - Named Driver Exclusion Endorsement * 880-411NY - Renewal Documents - Document - Named Driver Exclusion Endorsement |
| Documents Page | 880-830NY Consolidated Form Stories - Document Page   * 880-024NY - Documents page - Business Rules - Required for bind section * 880-023NY - Documents Page – Business Rules – Documents available for printing section * 880-030NY - Documents Page - Continue Button Rules * 880-029NY - Tasks and Override Rules * 580-028NY - Override Rules - Documents Page |
| GODD Page | 880-840NY Consolidated Form Stories - GODD Page   * 880-220NY - Documents appearing on GODD page * 880-221NY - Available documents-Business rules * 880-103NY - Documents- Generate on Demand Documents - Named Driver Exclusion Form |
| Forms Page | 880-820NY Forms Page Combo US-VC Template   * 070-243NY - Forms Page – Forms Impacted by Driver Rule |
| RFI | 880-860NY Consolidated Form Stories – RFI   * 880-063NY - RFI Document Production - Named Driver Exclusion |
| Packet/Print Story | 880-880NY Consolidated Form Stories - PRINTED Forms - Packets - Sequence - DCS mapping - BFC specs   * 880-239NY - New Business * 880-199NY - Endorsement |

### Signature Rules(if any)

* This is a signature form. “SIGNATURE ON FILE” should automatically print on signature line if insured has signed a copy at time of bind

### Document Content and Applicable Triggers

* **@Bind** – If the driver type is “Excluded” then this form is generated for Signature
* **@ New Business**

- If driver type is “Excluded” then system generates as part of “New Business”.

- Form number prints on New Business DEC page in FORMS & ENDORSEMENT section

- “SIGNATURE ON FILE” should automatically print on signature line if insured has signed a copy

at time of bind

- Parent signature line is printed if the Named Insured age is less than 18 years

* **@Amendment**

- If driver type “Excluded” is selected via a mid-term endorsement transaction system generates form as part of the Amendment packet.

- Form number prints on Amended DEC in the FORMS & ENDORSEMENT section

- If there is already an existing “excluded” driver on the policy and an additional “excluded” driver is added then a new form will system generate listing all “excluded drivers” and be part of the Amendment packet.

- If an “excluded” driver is deleted and there remains “excluded” driver(s) then a new form will system generate as part of the Amendment packet

- If all “excluded” drivers are deleted, the form will no longer apply

* **@Renewal**

- Form number must print on Renewal DEC page in the FORMS & ENDORSEMENT section if condition “Excluded” drivers still exists

- Form does not generate and is not part of the renewal offer packet **Document Content**

### Key pointers to keep in mind

* The form is not generated if there are no exluded drivers

## AA43DE Named Driver Exclusion Endorsement

### System/UI Impact

| Page | Yes/No | Page Section |
| --- | --- | --- |
| Forms | | Yes | * Driver Forms section | |
| Documents | | No | * Required to Bind Section * Default button selected is “Not Signed” * Document Available for Printing section * Default button is “Yes” | |
| GODD | | No | * Present is “Quote consolidated view” and “Policy consolidated view” | |
| Related UW Rule/Task | | No | * UW Rule 200034/Task 200034T related if Document value is “Not Signed” in “Required to Bind” section fo ‘Documents Page’ | |

### Impacted Stories

| Type | Story # *(enter story # or N/A if form doesn’t require update to state specific story. Any legacy EKM story #s within the listed combo templates should be included in the story writing analysis)* |
| --- | --- |
| Form Content & Triggers | 880-253DE Form Content and Triggers - Named Driver Exclusion Endorsement   * 880-253DE - Documents - New Business - Named Driver Exclusion Endorsement * 880-210DE - Documents -Endorsement - Named Driver Exclusion Endorsement * 880-411DE - Renewal Documents - Document - Named Driver Exclusion Endorsement |
| Documents Page | 880-830DE Consolidated Form Stories - Document Page   * 880-024DE - Documents page - Business Rules - Required for bind section * 880-023DE - Documents Page – Business Rules – Documents available for printing section * 880-030DE - Documents Page - Continue Button Rules * 880-029DE - Tasks and Override Rules * 580-028DE - Override Rules - Documents Page |
| GODD Page | 880-840DE Consolidated Form Stories - GODD Page   * 880-220DE - Documents appearing on GODD page * 880-221DE - Available documents-Business rules * 880-103DE - Documents- Generate on Demand Documents - Named Driver Exclusion Form |
| Forms Page | 880-820DE Forms Page Combo US-VC Template   * 070-243DE - Forms Page – Forms Impacted by Driver Rule |
| RFI | 880-860DE Consolidated Form Stories – RFI   * 880-063DE - RFI Document Production - Named Driver Exclusion |
| Packet/Print Story | 880-880DE Consolidated Form Stories - PRINTED Forms - Packets - Sequence - DCS mapping - BFC specs   * 880-239DE - New Business * 880-199DE - Endorsement |

### Signature Rules(if any)

* This is a signature form. “SIGNATURE ON FILE” should automatically print on signature line if insured has signed a copy at time of bind

### Document Content and Applicable Triggers

* **@Bind** – If the driver type is “Excluded” then this form is generated for Signature
* **@ New Business**

- If driver type is “Excluded” then system generates as part of “New Business”.

- Form number prints on New Business DEC page in FORMS & ENDORSEMENT section

- “SIGNATURE ON FILE” should automatically print on signature line if insured has signed a copy

at time of bind

- Parent signature line is printed if the Named Insured age is less than 18 years

* **@Amendment**

- If driver type “Excluded” is selected via a mid-term endorsement transaction system generates form as part of the Amendment packet.

- Form number prints on Amended DEC in the FORMS & ENDORSEMENT section

- If there is already an existing “excluded” driver on the policy and an additional “excluded” driver is added then a new form will system generate listing all “excluded drivers” and be part of the Amendment packet.

- If an “excluded” driver is deleted and there remains “excluded” driver(s) then a new form will system generate as part of the Amendment packet

- If all “excluded” drivers are deleted, the form will no longer apply

* **@Renewal**

- Form number must print on Renewal DEC page in the FORMS & ENDORSEMENT section if condition “Excluded” drivers still exists

- Form does not generate and is not part of the renewal offer packet **Document Content**

### Key pointers to keep in mind

* The form is not generated if there are no exluded drivers

## AA43CT Named Driver Exclusion Endorsement

### System/UI Impact

| Page | Yes/No | Page Section |
| --- | --- | --- |
| Forms | | Yes | * Driver Forms section | |
| Documents | | No | * Required to Bind Section * Default button selected is “Not Signed” * Document Available for Printing section * Default button is “Yes” | |
| GODD | | No | * Present is “Quote consolidated view” and “Policy consolidated view” | |
| Related UW Rule/Task | | No | * UW Rule 200034/Task 200034T related if Document value is “Not Signed” in “Required to Bind” section fo ‘Documents Page’ | |

### Impacted Stories

| Type | Story # *(enter story # or N/A if form doesn’t require update to state specific story. Any legacy EKM story #s within the listed combo templates should be included in the story writing analysis)* |
| --- | --- |
| Form Content & Triggers | 880-253CT Form Content and Triggers - Named Driver Exclusion Endorsement   * 880-253CT - Documents - New Business - Named Driver Exclusion Endorsement * 880-210CT - Documents -Endorsement - Named Driver Exclusion Endorsement * 880-411CT - Renewal Documents - Document - Named Driver Exclusion Endorsement |
| Documents Page | 880-830CT Consolidated Form Stories - Document Page   * 880-024CT - Documents page - Business Rules - Required for bind section * 880-023CT - Documents Page – Business Rules – Documents available for printing section * 880-030CT - Documents Page - Continue Button Rules * 880-029CT - Tasks and Override Rules * 580-028CT - Override Rules - Documents Page |
| GODD Page | 880-840CT Consolidated Form Stories - GODD Page   * 880-220CT - Documents appearing on GODD page * 880-221CT - Available documents-Business rules * 880-103CT - Documents- Generate on Demand Documents - Named Driver Exclusion Form |
| Forms Page | 880-820CT Forms Page Combo US-VC Template   * 070-243CT - Forms Page – Forms Impacted by Driver Rule |
| RFI | 880-860CT Consolidated Form Stories – RFI   * 880-063CT - RFI Document Production - Named Driver Exclusion |
| Packet/Print Story | 880-880CT Consolidated Form Stories - PRINTED Forms - Packets - Sequence - DCS mapping - BFC specs   * 880-239CT - New Business * 880-199CT - Endorsement |

### Signature Rules(if any)

* This is a signature form. “SIGNATURE ON FILE” should automatically print on signature line if insured has signed a copy at time of bind

### Document Content and Applicable Triggers

* **@Bind** – If the driver type is “Excluded” then this form is generated for Signature
* **@ New Business**

- If driver type is “Excluded” then system generates as part of “New Business”.

- Form number prints on New Business DEC page in FORMS & ENDORSEMENT section

- “SIGNATURE ON FILE” should automatically print on signature line if insured has signed a copy

at time of bind

- Parent signature line is printed if the Named Insured age is less than 18 years

* **@Amendment**

- If driver type “Excluded” is selected via a mid-term endorsement transaction system generates form as part of the Amendment packet.

- Form number prints on Amended DEC in the FORMS & ENDORSEMENT section

- If there is already an existing “excluded” driver on the policy and an additional “excluded” driver is added then a new form will system generate listing all “excluded drivers” and be part of the Amendment packet.

- If an “excluded” driver is deleted and there remains “excluded” driver(s) then a new form will system generate as part of the Amendment packet

- If all “excluded” drivers are deleted, the form will no longer apply

* **@Renewal**

- Form number must print on Renewal DEC page in the FORMS & ENDORSEMENT section if condition “Excluded” drivers still exists

- Form does not generate and is not part of the renewal offer packet **Document Content**

### Key pointers to keep in mind

* The form is not generated if there are no exluded drivers

## AA43KY Named Driver Exclusion Endorsement

### System/UI Impact

| Page | Yes/No | Page Section |
| --- | --- | --- |
| Forms | | Yes | * Driver Forms section | |
| Documents | | No | * Required to Bind Section * Default button selected is “Not Signed” * Document Available for Printing section * Default button is “Yes” | |
| GODD | | No | * Present is “Quote consolidated view” and “Policy consolidated view” | |
| Related UW Rule/Task | | No | * UW Rule 200034/Task 200034T related if Document value is “Not Signed” in “Required to Bind” section fo ‘Documents Page’ | |

### Impacted Stories

| Type | Story # *(enter story # or N/A if form doesn’t require update to state specific story. Any legacy EKM story #s within the listed combo templates should be included in the story writing analysis)* |
| --- | --- |
| Form Content & Triggers | 880-253KY Form Content and Triggers - Named Driver Exclusion Endorsement   * 880-253KY - Documents - New Business - Named Driver Exclusion Endorsement * 880-210KY - Documents -Endorsement - Named Driver Exclusion Endorsement * 880-411KY - Renewal Documents - Document - Named Driver Exclusion Endorsement |
| Documents Page | 880-830KY Consolidated Form Stories - Document Page   * 880-024KY - Documents page - Business Rules - Required for bind section * 880-023KY - Documents Page – Business Rules – Documents available for printing section * 880-030KY - Documents Page - Continue Button Rules * 880-029KY - Tasks and Override Rules * 580-028KY - Override Rules - Documents Page |
| GODD Page | 880-840KY Consolidated Form Stories - GODD Page   * 880-220KY - Documents appearing on GODD page * 880-221KY - Available documents-Business rules * 880-103KY - Documents- Generate on Demand Documents - Named Driver Exclusion Form |
| Forms Page | 880-820KY Forms Page Combo US-VC Template   * 070-243KY - Forms Page – Forms Impacted by Driver Rule |
| RFI | 880-860KY Consolidated Form Stories – RFI   * 880-063KY - RFI Document Production - Named Driver Exclusion |
| Packet/Print Story | 880-880KY Consolidated Form Stories - PRINTED Forms - Packets - Sequence - DCS mapping - BFC specs   * 880-239KY - New Business * 880-199KY - Endorsement |

### Signature Rules(if any)

* This is a signature form. “SIGNATURE ON FILE” should automatically print on signature line if insured has signed a copy at time of bind

### Document Content and Applicable Triggers

* **@Bind** – If the driver type is “Excluded” then this form is generated for Signature
* **@ New Business**

- If driver type is “Excluded” then system generates as part of “New Business”.

- Form number prints on New Business DEC page in FORMS & ENDORSEMENT section

- “SIGNATURE ON FILE” should automatically print on signature line if insured has signed a copy

at time of bind

- Parent signature line is printed if the Named Insured age is less than 18 years

- “Authorized Representative” signature is required and must include the designated signature. Name is variable as it may change in the future.

* **@Amendment**

- If driver type “Excluded” is selected via a mid-term endorsement transaction system generates form as part of the Amendment packet.

- Form number prints on Amended DEC in the FORMS & ENDORSEMENT section

- If there is already an existing “excluded” driver on the policy and an additional “excluded” driver is added then a new form will system generate listing all “excluded drivers” and be part of the Amendment packet.

- If an “excluded” driver is deleted and there remains “excluded” driver(s) then a new form will system generate as part of the Amendment packet

- If all “excluded” drivers are deleted, the form will no longer apply

* **@Renewal**

- Form number must print on Renewal DEC page in the FORMS & ENDORSEMENT section if condition “Excluded” drivers still exists

- Form does not generate and is not part of the renewal offer packet

### Key pointers to keep in mind

* The form is not generated if there are no exluded drivers

## AA43DC Named Driver Exclusion Endorsement

### System/UI Impact

| Page | Yes/No | Page Section |
| --- | --- | --- |
| Forms | | Yes | * Driver Forms section | |
| Documents | | No | * Required to Bind Section * Default button selected is “Not Signed” * Document Available for Printing section * Default button is “Yes” | |
| GODD | | No | * Present is “Quote consolidated view” and “Policy consolidated view” | |
| Related UW Rule/Task | | No | * UW Rule 200034/Task 200034T related if Document value is “Not Signed” in “Required to Bind” section fo ‘Documents Page’ | |

### Impacted Stories

| Type | Story # *(enter story # or N/A if form doesn’t require update to state specific story. Any legacy EKM story #s within the listed combo templates should be included in the story writing analysis)* |
| --- | --- |
| Form Content & Triggers | 880-253DC Form Content and Triggers - Named Driver Exclusion Endorsement   * 880-253DC - Documents - New Business - Named Driver Exclusion Endorsement * 880-210DC - Documents -Endorsement - Named Driver Exclusion Endorsement * 880-411DC - Renewal Documents - Document - Named Driver Exclusion Endorsement |
| Documents Page | 880-830DC Consolidated Form Stories - Document Page   * 880-024DC - Documents page - Business Rules - Required for bind section * 880-023DC - Documents Page – Business Rules – Documents available for printing section * 880-030DC - Documents Page - Continue Button Rules * 880-029DC - Tasks and Override Rules * 580-028DC - Override Rules - Documents Page |
| GODD Page | 880-840DC Consolidated Form Stories - GODD Page   * 880-220DC - Documents appearing on GODD page * 880-221DC - Available documents-Business rules * 880-103DC - Documents- Generate on Demand Documents - Named Driver Exclusion Form |
| Forms Page | 880-820DC Forms Page Combo US-VC Template   * 070-243DC - Forms Page – Forms Impacted by Driver Rule |
| RFI | 880-860DC Consolidated Form Stories – RFI   * 880-063DC - RFI Document Production - Named Driver Exclusion |
| Packet/Print Story | 880-880DC Consolidated Form Stories - PRINTED Forms - Packets - Sequence - DCS mapping - BFC specs   * 880-239DC - New Business * 880-199DC - Endorsement |

### Signature Rules(if any)

* This is a signature form. “SIGNATURE ON FILE” should automatically print on signature line if insured has signed a copy at time of bind

### Document Content and Applicable Triggers

* **@Bind** – If the driver type is “Excluded” then this form is generated for Signature
* **@ New Business**

- If driver type is “Excluded” then system generates as part of “New Business”.

- Form number prints on New Business DEC page in FORMS & ENDORSEMENT section

- “SIGNATURE ON FILE” should automatically print on signature line if insured has signed a copy

at time of bind

- Parent signature line is printed if the Named Insured age is less than 18 years

* **@Amendment**

- If driver type “Excluded” is selected via a mid-term endorsement transaction system generates form as part of the Amendment packet.

- Form number prints on Amended DEC in the FORMS & ENDORSEMENT section

- If there is already an existing “excluded” driver on the policy and an additional “excluded” driver is added then a new form will system generate listing all “excluded drivers” and be part of the Amendment packet.

- If an “excluded” driver is deleted and there remains “excluded” driver(s) then a new form will system generate as part of the Amendment packet

- If all “excluded” drivers are deleted, the form will no longer apply

* **@Renewal**

- Form number must print on Renewal DEC page in the FORMS & ENDORSEMENT section if condition “Excluded” drivers still exists

- Form does not generate and is not part of the renewal offer packet

### Key pointers to keep in mind

* The form is not generated if there are no exluded drivers

## AA43ID Named Driver Exclusion Endorsement

### System/UI Impact

| Page | Yes/No | Page Section |
| --- | --- | --- |
| Forms | | Yes | * Driver Forms section | |
| Documents | | No | * Required to Bind Section * Default button selected is “Not Signed” * Document Available for Printing section * Default button is “Yes” | |
| GODD | | No | * Present is “Quote consolidated view” and “Policy consolidated view” | |
| Related UW Rule/Task | | No | * UW Rule 200034/Task 200034T related if Document value is “Not Signed” in “Required to Bind” section fo ‘Documents Page’ | |

### Impacted Stories

| Type | Story # *(enter story # or N/A if form doesn’t require update to state specific story. Any legacy EKM story #s within the listed combo templates should be included in the story writing analysis)* |
| --- | --- |
| Form Content & Triggers | 880-253ID Form Content and Triggers - Named Driver Exclusion Endorsement   * 880-253ID - Documents - New Business - Named Driver Exclusion Endorsement * 880-210ID - Documents -Endorsement - Named Driver Exclusion Endorsement * 880-411ID - Renewal Documents - Document - Named Driver Exclusion Endorsement |
| Documents Page | 880-830DC Consolidated Form Stories - Document Page   * 880-024ID - Documents page - Business Rules - Required for bind section * 880-023ID - Documents Page – Business Rules – Documents available for printing section * 880-030ID - Documents Page - Continue Button Rules * 880-029ID - Tasks and Override Rules * 580-028ID - Override Rules - Documents Page |
| GODD Page | 880-840ID Consolidated Form Stories - GODD Page   * 880-220ID - Documents appearing on GODD page * 880-221ID - Available documents-Business rules * 880-103ID - Documents- Generate on Demand Documents - Named Driver Exclusion Form |
| Forms Page | 880-820DC Forms Page Combo US-VC Template   * 070-243ID - Forms Page – Forms Impacted by Driver Rule |
| RFI | 880-860DC Consolidated Form Stories – RFI   * 880-063ID - RFI Document Production - Named Driver Exclusion |
| Packet/Print Story | 880-880DC Consolidated Form Stories - PRINTED Forms - Packets - Sequence - DCS mapping - BFC specs   * 880-239ID - New Business * 880-199ID - Endorsement |

### Signature Rules(if any)

* This is a signature form. “SIGNATURE ON FILE” should automatically print on signature line if insured has signed a copy at time of bind

### Document Content and Applicable Triggers

* **@Bind** – If the driver type is “Excluded” then this form is generated for Signature
* **@ New Business**

- If driver type is “Excluded” then system generates as part of “New Business”.

- Form number prints on New Business DEC page in FORMS & ENDORSEMENT section

- “SIGNATURE ON FILE” should automatically print on signature line if insured has signed a copy

at time of bind

- Parent signature line is printed if the Named Insured age is less than 18 years

* **@Amendment**

- If driver type “Excluded” is selected via a mid-term endorsement transaction system generates form as part of the Amendment packet.

- Form number prints on Amended DEC in the FORMS & ENDORSEMENT section

- If there is already an existing “excluded” driver on the policy and an additional “excluded” driver is added then a new form will system generate listing all “excluded drivers” and be part of the Amendment packet.

- If an “excluded” driver is deleted and there remains “excluded” driver(s) then a new form will system generate as part of the Amendment packet

- If all “excluded” drivers are deleted, the form will no longer apply

* **@Renewal**

- Form number must print on Renewal DEC page in the FORMS & ENDORSEMENT section if condition “Excluded” drivers still exists

- Form does not generate and is not part of the renewal offer packet

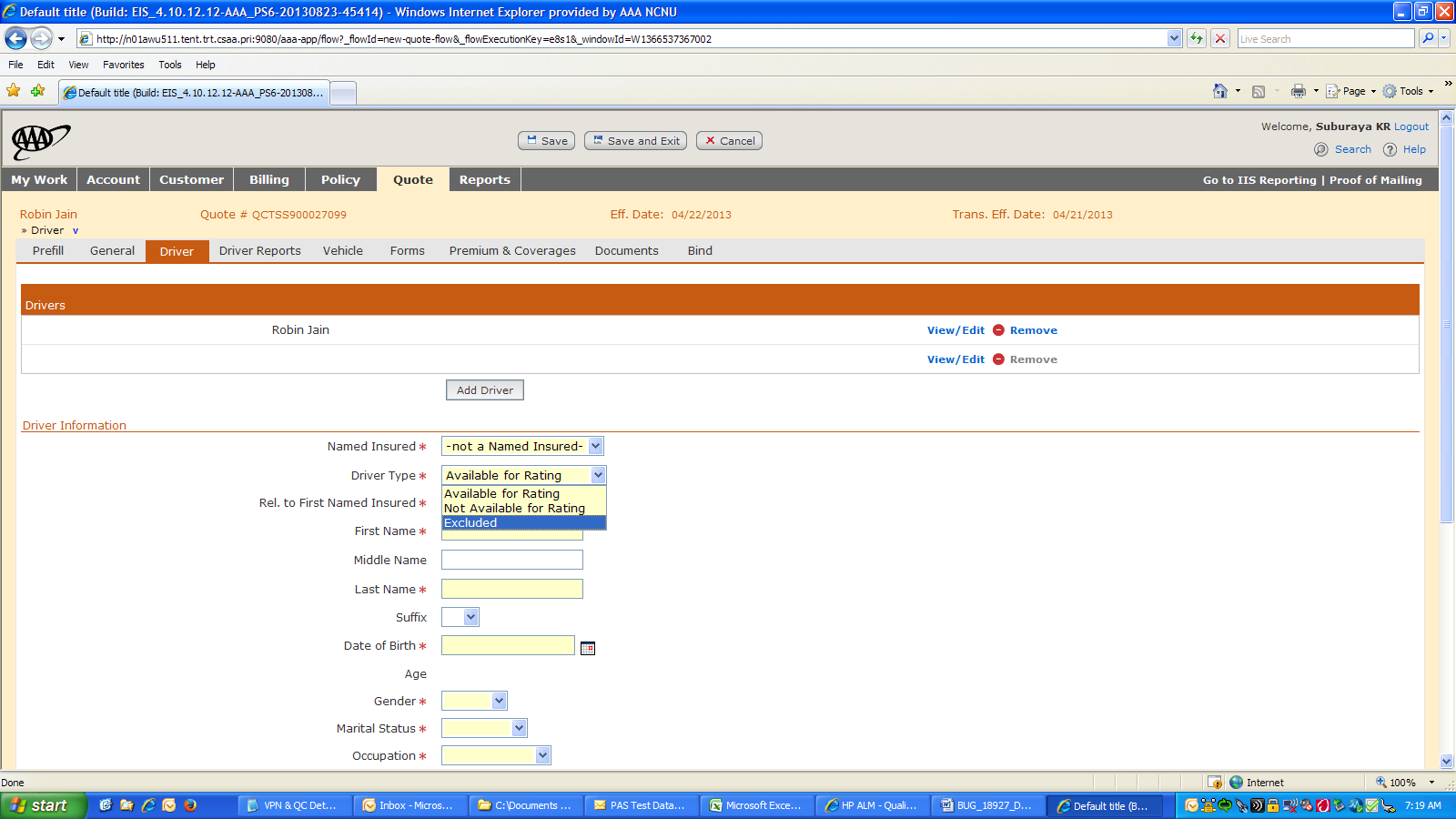
### Key pointers to keep in mind

* The form is not generated if there are no exluded drivers
  1. References to Documents

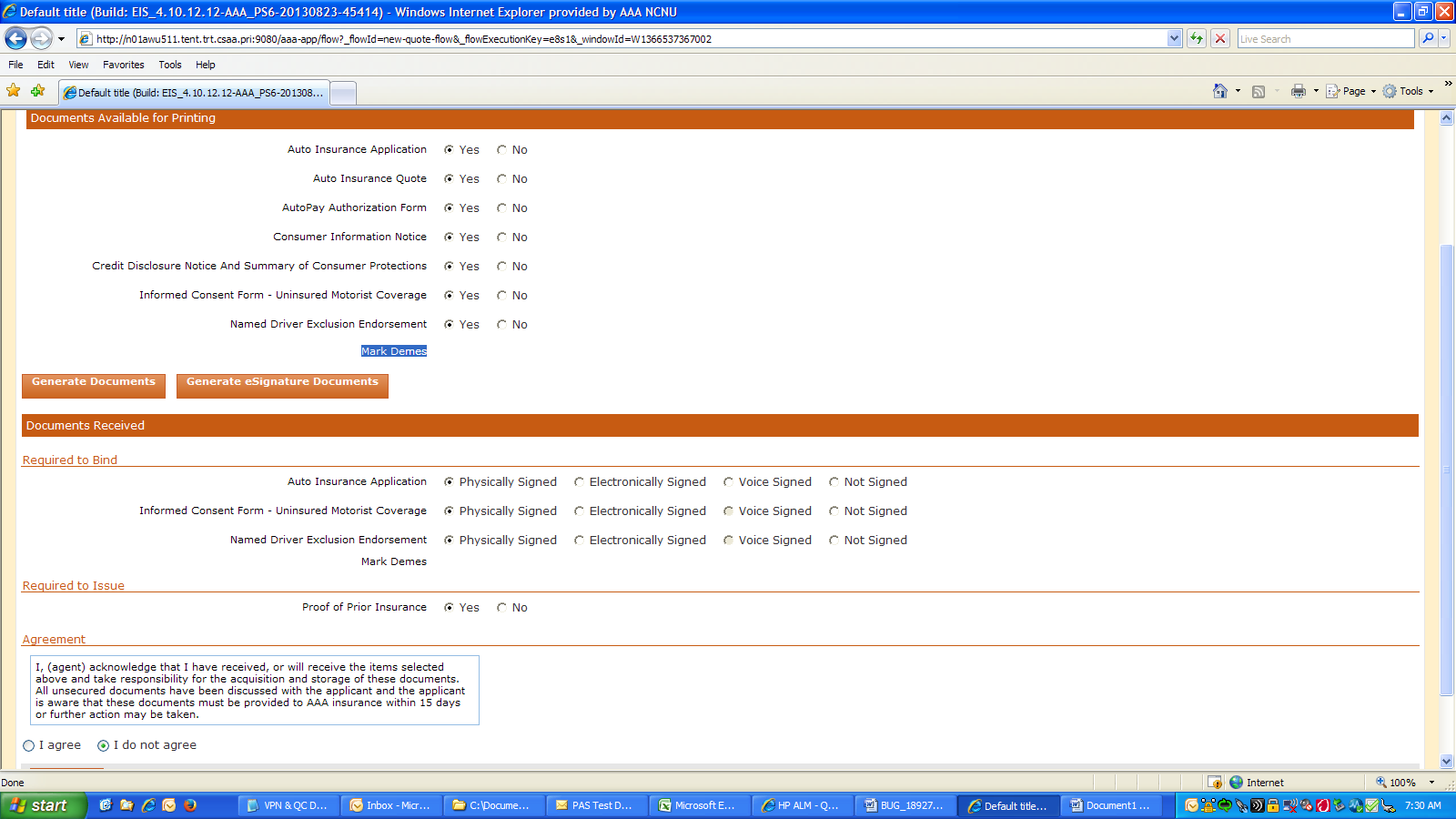
| Document Links | Document Description |
| --- | --- |
| [880-253MT](https://ekm1.stage.exigengroup.com/EKMWiki/index.php/880-253MT_Consolidated_-_Form_Contents_and_Triggers_-_Named_Driver_Exclusion) | EKM Link for Form Template and US/VC |
| [880-253WY](https://ekm1.stage.exigengroup.com/EKMWiki/index.php/880-253WY_-_Documents-_New_Buisness_-_Named_Driver_Exclusion_Form) | EKM Link for Form Template and US/VC |
| [880-253MD](https://ekm1.stage.exigengroup.com/EKMWiki/index.php/880-253MD_-_Documents_-_New_Business_-_Named_Driver_Exclusion_Endorsement) | EKM Link for Form Template and US/VC |
| [880-253PA](https://ekm1.stage.exigengroup.com/EKMWiki/index.php/880-253PA_-_Documents-_New_Buisness_-_Named_Driver_Exclusion_Form) | EKM Link for Form Template and US/VC |
| [880-253NJ](https://ekm1.stage.exigengroup.com/EKMWiki/index.php/880-253NJ_-_Documents_-_New_Business_-_Named_Driver_Exclusion_Endorsement) | EKM Link for Form Template and US/VC |
| [880-253NY](https://ekm1.stage.exigengroup.com/EKMWiki/index.php/880-253NY_-_Documents_-_New_Business_-_Named_Driver_Exclusion_Endorsement) | EKM Link for Form Template and US/VC |
| [880-253DE](https://ekm1.stage.exigengroup.com/EKMWiki/index.php/880-253DE_-_Documents_-_New_Business_-_Named_Driver_Exclusion_Endorsement) | EKM Link for Form Template and US/VC |
| [880-253CT](https://ekm1.stage.exigengroup.com/EKMWiki/index.php/880-253CT_-_Documents_-_New_Business_-_Named_Driver_Exclusion_Endorsement) | EKM Link for Form Template and US/VC |
| [880-253KY](https://ekm1.stage.exigengroup.com/EKMWiki/index.php/880-253KY_-_Documents_-_New_Business_-_Named_Driver_Exclusion_Endorsement) | EKM Link for Form Template and US/VC |
| [880-253DC](https://ekm1.stage.exigengroup.com/EKMWiki/index.php/880-253DC_-_Documents_-_New_Business_-_Named_Driver_Exclusion_Endorsement) | EKM Link for Form Template and US/VC |
| [880-253ID](https://ekm1.stage.exigengroup.com/EKMWiki/index.php/880-253ID_-_Documents_-_New_Business_-_Named_Driver_Exclusion_Endorsement) | EKM Link for Form Template and US/VC |

* 1. Reference Screenshots

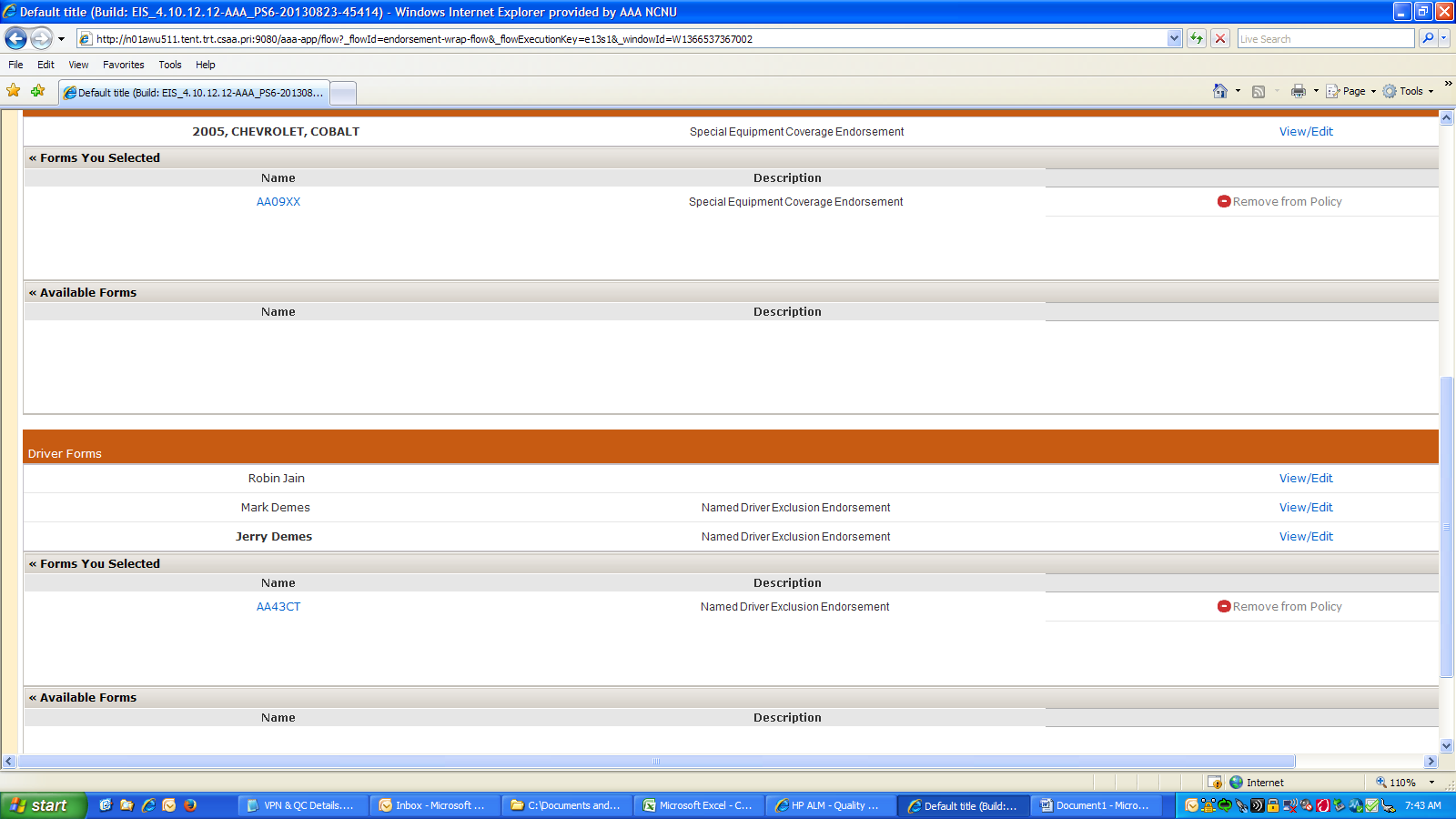
Option on Driver Page to exclude driver



Excluded driver name displayed on Documents Page



Excluded Driver names displayed on Forms Page



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