

Policy Contacts and Mailing Address Updates

February 29, 2016

Citizens continues to improve PolicyCenter® for managing contacts and updating policy mailing addresses. The changes outlined below are effective immediately. For more details, log in to the *Agents* site and refer to the job aids and modules on the PolicyCenter training pages.

Account Holder Information

- When creating a new submission, PolicyCenter prefills the *First Named Insured* and *Policy Mailing Address* fields using the *Account Holder* information:
 - Agents can edit these fields in the submission transaction.
 - Edited contact information will apply *only* to the submission and does not impact the *Account Holder* information.
- Once the first submission for an account is approved by Underwriting, PolicyCenter creates a new *Role* for the *Account Holder* in *Account File Contacts: Named Insured*. See Figure 1 below.
- As additional submissions associated with an account are created, PolicyCenter creates an account contact that is unique for each submission. This results in multiple listings of the same contact person or company on the Account File Contacts screen.

To verify which policy the contact is associated with, select the contact and click the Associated Policies tab:

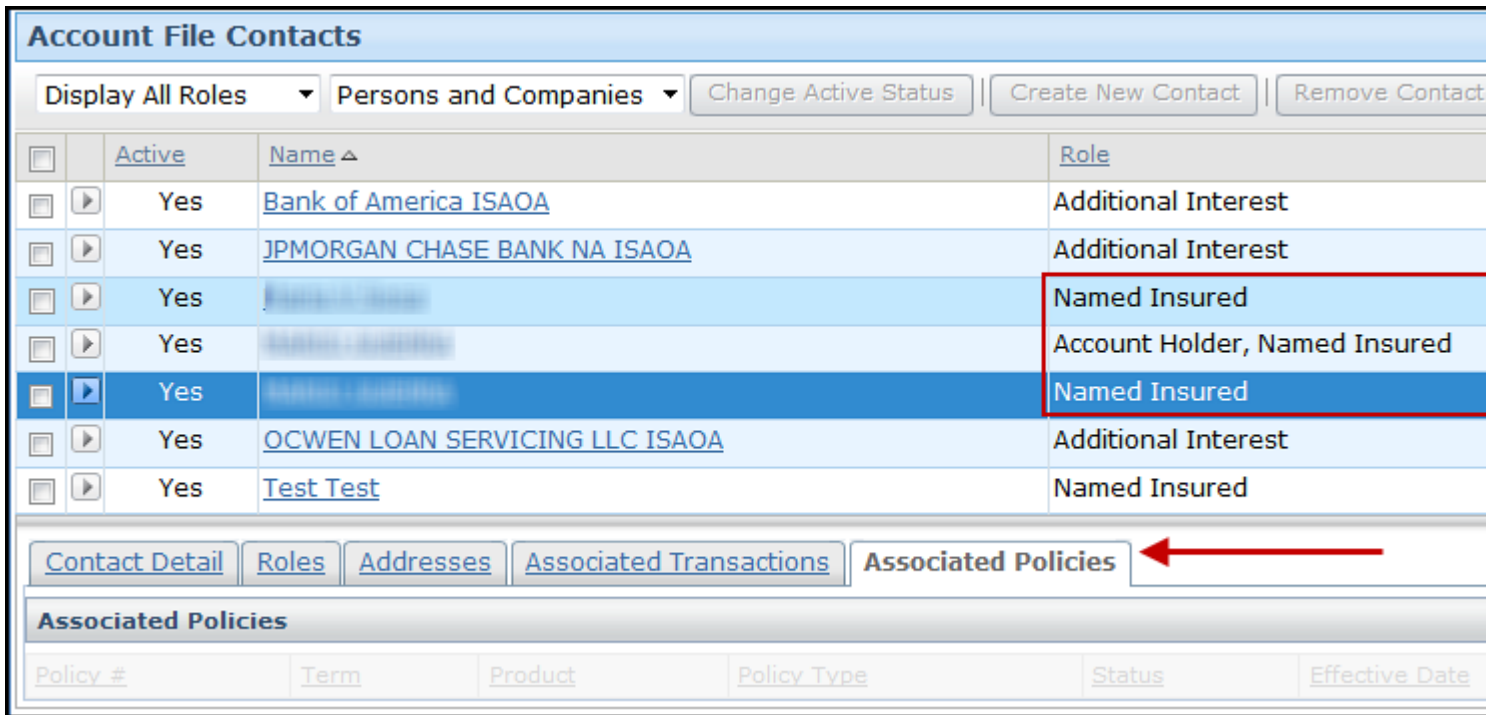


Figure 1: Associated Policies tab on the Account File Contacts screen

Note

When a submission is withdrawn, any corresponding edits to the *First Named Insured* contact information are deleted.

Adding Location Contacts

When adding the same *Location Contact* to multiple locations/buildings on the same policy, agents should enter *Location Contact* details once. To add the contact to additional locations/buildings, select **Existing Location Contact** on the *Location Contacts* Add drop-down list:

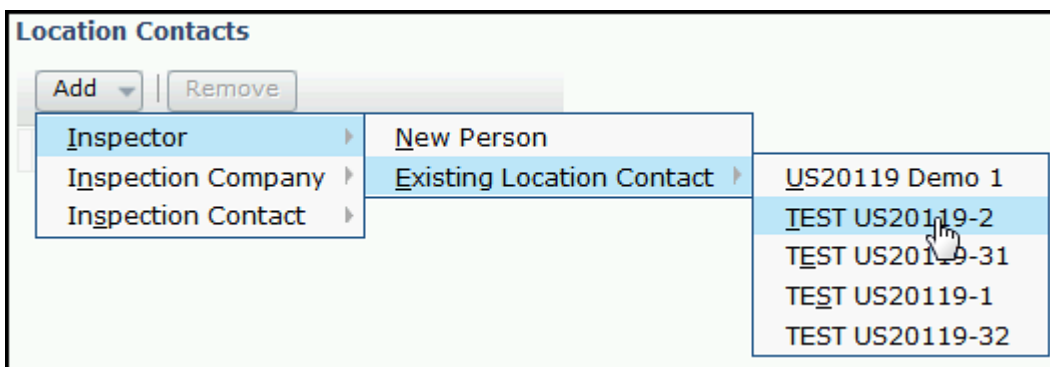


Figure 2: Add Location Contacts drop-down options on the Location Information screen

Policy Mailing Address Updates

When an agent edits the *Policy Mailing Address* on the *Policy Info* screen, the *Change To:* drop-down options have been updated to display:

- *Existing Address*, when applicable
- *Update Address*

This system update allows PolicyCenter to set the first named insured's primary mailing address with data to match the edited *Policy Mailing Address* data.

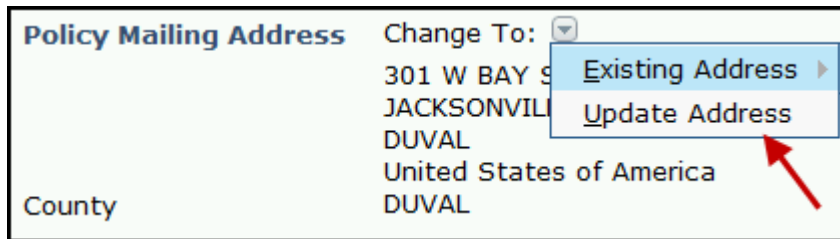


Figure 3: New Change To: drop-down options in the Policy Mailing Address section

Note

If the first named insured is associated with more than one policy, the mailing address change must be submitted for each policy via a policy change transaction.

Entering a Care of Mailing Address

When adding or updating a mailing address that includes *care of* (i.e., *c/o*):

1. Enter the *c/o* information in the *Address Line 1* field.
2. Enter the street or P.O. Box address in the *Address Line 2* field.
3. Select **Override** from the *Address* drop-down options.
4. The address will print as follows:

Name
c/o information
Street or P.O. Box address
City, State ZIP

Share:

- [mailto:?subject=Policy Contacts and Mailing Address Updates&body=Check out this site I came across http://www.citizensfla.com/cl?p_p_id=com.liferay.portal.web.portlet.JournalPortlet&p_p_lifecycle=2&p_p_state=exclusive&p_p_resource_id=exportArticle&p_p_cacheability=cacheLevelPage&com.liferay.portal.web.portlet.JournalPortlet_groupId=20702&com.liferay.portal.web.portlet.JournalPortlet_articleId=1063428&com.liferay.portal.web.portlet.JournalPortlet_plid=30898&com.liferay.portal.web.portlet.JournalPortlet_portletResource=com.liferay.asset.publisher.web.portlet.AssetPublisherPortlet_INSTANCE_3YC3hsskaUbZ&com.liferay.portal.web.portlet.JournalPortlet_targetExtension=pdf](mailto:?subject=Policy%20Contacts%20and%20Mailing%20Address%20Updates&body=Check%20out%20this%20site%20I%20came%20across%20http://www.citizensfla.com/cl?p_p_id=com.liferay.portal.web.portlet.JournalPortlet&p_p_lifecycle=2&p_p_state=exclusive&p_p_resource_id=exportArticle&p_p_cacheability=cacheLevelPage&com.liferay.portal.web.portlet.JournalPortlet_groupId=20702&com.liferay.portal.web.portlet.JournalPortlet_articleId=1063428&com.liferay.portal.web.portlet.JournalPortlet_plid=30898&com.liferay.portal.web.portlet.JournalPortlet_portletResource=com.liferay.asset.publisher.web.portlet.AssetPublisherPortlet_INSTANCE_3YC3hsskaUbZ&com.liferay.portal.web.portlet.JournalPortlet_targetExtension=pdf)