Supplying Contact Information

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febrero 22, 2017

To enhance Citizens' communication efforts with policyholders and assist agents with servicing their policies, agents can provide more contact information for new-business submissions and policy changes on the *Policy Info* screen in PolicyCenter®.

Phone Numbers

- If the first named insured is a person, the *Mobile Phone* field is required.
- If the first named insured is listed as a company account, the *Work Phone* field is required.

If the agent does not provide a phone number, one of the following messages will appear when they select *Request Approval*:

- *Mobile Phone number has not been provided.*
- *Phone number has not been provided.*

Note

If the mobile phone number is not provided, the agent will be prompted to complete the *Reason For No Mobile* field, and the *Home Phone* field becomes a required field.

Email Address

Agents can complete the Primary Email field for first named insured. If not, the following message will appear when they select Request Approval:

- *Primary Email Address has not been provided.*

Note

If the policyholder does not have an email address, the agent will be prompted to complete the Reason For No Email field.

Required Inspection Contact Information

If an inspection contact is not provided on the Policy Info screen, agents now must complete the Inspection Contact Information fields on the Policy Info screen when adding a new location or building to the policy. This information will apply to all buildings and locations for the policy; however, if there's another inspection contact, agents can add it in the Buildings and Locations screen

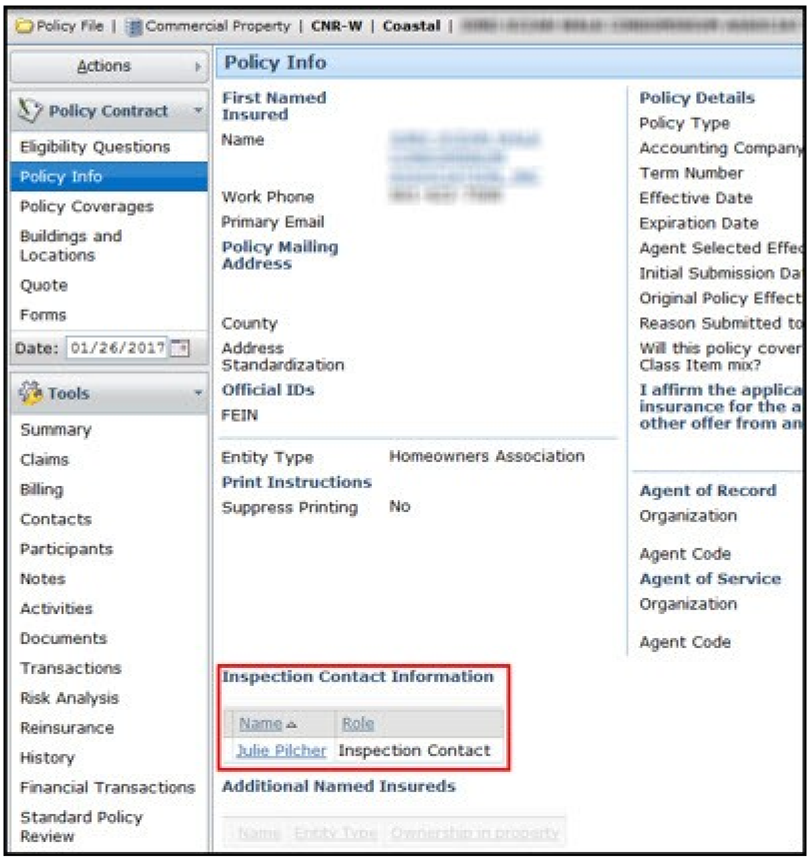

Figure 1: Inspection Contact Information on the Policy Info screen.

To complete the *Inspection Contact Information* fields, an agent must complete the *First Name*, *Last Name* and either *Home Phone* or *Work Phone* fields on the *New Inspection Contact* screen.

If the *Inspection Contact Information* field is not completed, the following validation message will appear:

- *You must add inspection contact information to continue. Include a home or work phone number.*

Additional Resources

For step-by-step instructions about how to complete the *Policy Info* screen in PolicyCenter, log in to the *Agents* site, and using the *Frequently Asked Questions* feature under the *Search* menu, search for *205*

- For step-by-step instructions about adding an *Inspection Contact* in PolicyCenter, log in to the *Agents* site, and using the *Frequently Asked Questions* feature under the Search menu, search for *3334*.
- Agents also can access the FAQs by clicking on the *Knowledge Base* link at the top right corner of every screen in PolicyCenter.
- Agents and their staff can attend one of two free webinars on March 2 or 3, which will provide additional information about PolicyCenter enhancements and other important Citizens news:
    - Thursday, March 2: 2-3 p.m.
    - Friday, March 3: 10-11 a.m.

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