

Supplying Contact Information

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.*
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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.*
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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

The screenshot shows the 'Policy Info' screen in a software application. The left sidebar contains a navigation menu with options like 'Policy Contract', 'Eligibility Questions', 'Policy Info', 'Policy Coverages', 'Buildings and Locations', 'Quote', 'Forms', 'Tools', 'Summary', 'Claims', 'Billing', 'Contacts', 'Participants', 'Notes', 'Activities', 'Documents', 'Transactions', 'Risk Analysis', 'Reinsurance', 'History', 'Financial Transactions', 'Standard Policy', and 'Review'. The main content area is titled 'Policy Info' and contains several sections: 'First Named Insured' (Name, Work Phone, Primary Email, Policy Mailing Address), 'Policy Details' (Policy Type, Accounting Company, Term Number, Effective Date, Expiration Date, Agent Selected Effect, Initial Submission Date, Original Policy Effect, Reason Submitted to, Will this policy cover Class Item mix?, I affirm the applica insurance for the a other offer from an), 'County', 'Address Standardization', 'Official IDs' (FEIN), 'Entity Type' (Homeowners Association), 'Print Instructions', 'Suppress Printing' (No), 'Agent of Record' (Organization, Agent Code, Agent of Service Organization, Agent Code), and 'Inspection Contact Information'. The 'Inspection Contact Information' section is highlighted with a red box and contains a table with columns 'Name' and 'Role'. The table has one row with 'Julie Pilcher' in the 'Name' column and 'Inspection Contact' in the 'Role' column. Below this is the 'Additional Named Insureds' section with a table header 'Name', 'Entity Type', and 'Ownership in property'.

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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