

# Policy Contacts and Mailing Address Updates

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febrero 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.

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## 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 bound, 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 bound, 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:

**Account File Contacts**

Display All Roles ▾ Persons and Companies ▾ Change Active Status Create New Contact Remove Contact

<input type="checkbox"/>	Active	Name ▲	Role
<input type="checkbox"/>	Yes	Bank of America ISAOA	Additional Interest
<input type="checkbox"/>	Yes	JPMORGAN CHASE BANK NA ISAOA	Additional Interest
<input type="checkbox"/>	Yes	[Redacted]	Named Insured
<input type="checkbox"/>	Yes	[Redacted]	Account Holder, Named Insured
<input checked="" type="checkbox"/>	Yes	[Redacted]	Named Insured
<input type="checkbox"/>	Yes	OCWEN LOAN SERVICING LLC ISAOA	Additional Interest
<input type="checkbox"/>	Yes	Test Test	Named Insured

Contact Detail Roles Addresses Associated Transactions **Associated Policies** ←

**Associated Policies**

Policy #	Term	Product	Policy Type	Status	Effective Date
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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When a submission is withdrawn, any corresponding edits to the First Named Insured contact information are deleted.

## 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.

**Policy Mailing Address** Change To: ▾

301 W BAY S  
JACKSONVILLE  
DUVAL  
United States of America

County DUVAL

Existing Address ▶  
Update Address

Figure 2: New Change To: drop-down options in the Policy Mailing Address section

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## 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.

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## 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/es/plb?p\\_p\\_id=com\\_liferay\\_journal\\_web\\_portlet\\_JournalPortlet&p\\_p\\_lifecycle=2&p\\_p\\_state=exclusive&p\\_p\\_resource\\_id=exportArticle&p\\_p\\_cacheability=cacheLevelPage&com\\_liferay\\_journal\\_web\\_portlet\\_JournalPortlet\\_groupId=20702&com\\_liferay\\_journal\\_web\\_portlet\\_JournalPortlet\\_articleId=1063437&com\\_liferay\\_journal\\_web\\_portlet\\_JournalPortlet\\_plid=30878&com\\_liferay\\_journal\\_web\\_portlet\\_JournalPortlet\\_portletResource=com\\_liferay\\_asset\\_publisher\\_web\\_portlet\\_AssetPublisherPortlet\\_INSTANCE\\_3YC3hsskaUbZ&com\\_liferay\\_journal\\_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/es/plb?p_p_id=com_liferay_journal_web_portlet_JournalPortlet&p_p_lifecycle=2&p_p_state=exclusive&p_p_resource_id=exportArticle&p_p_cacheability=cacheLevelPage&com_liferay_journal_web_portlet_JournalPortlet_groupId=20702&com_liferay_journal_web_portlet_JournalPortlet_articleId=1063437&com_liferay_journal_web_portlet_JournalPortlet_plid=30878&com_liferay_journal_web_portlet_JournalPortlet_portletResource=com_liferay_asset_publisher_web_portlet_AssetPublisherPortlet_INSTANCE_3YC3hsskaUbZ&com_liferay_journal_web_portlet_JournalPortlet_targetExtension=pdf)