

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 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:

The screenshot displays the 'Account File Contacts' interface. At the top, there are filters for 'Display All Roles' (set to 'Persons and Companies') and buttons for 'Change Active Status', 'Create New Contact', and 'Remove Contact'. Below this is a table with columns for 'Active', 'Name', and 'Role'. The table lists several contacts, with the one having the role 'Named Insured' highlighted in blue. A red box highlights the 'Named Insured' role for this contact. At the bottom, a navigation bar contains tabs for 'Contact Detail', 'Roles', 'Addresses', 'Associated Transactions', and 'Associated Policies'. A red arrow points to the 'Associated Policies' tab. Below the navigation bar, the 'Associated Policies' section is visible, showing a table with columns for 'Policy #', 'Term', 'Product', 'Policy Type', 'Status', and 'Effective Date'.

Active	Name	Role
Yes	Bank of America ISAOA	Additional Interest
Yes	JPMORGAN CHASE BANK NA ISAOA	Additional Interest
Yes	[Redacted]	Named Insured
Yes	[Redacted]	Account Holder, Named Insured
Yes	[Redacted]	Named Insured
Yes	OCWEN LOAN SERVICING LLC ISAOA	Additional Interest
Yes	Test Test	Named Insured

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

Note

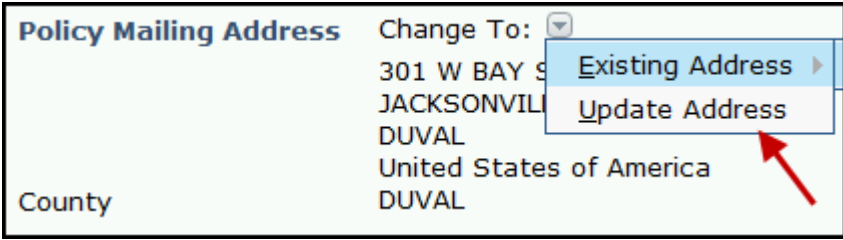
When a submission is withdrawn, any corresponding edits to the First Named Insured contact information are deleted.

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.



The screenshot shows a form titled "Policy Mailing Address". The "Change To:" field is open, displaying two options: "Existing Address" and "Update Address". A red arrow points to the "Update Address" option. The address information displayed below the dropdown is: "301 W BAY S JACKSONVIL DUVAL United States of America DUVAL". The "County" field is also visible and contains "DUVAL".

Figure 2: 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:

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