



Amendment- Add a Mortgagee

Purpose

When you need to add a mortgagee to a Businessowners policy.

Helpful Hints

If you wish to complete this scenario without having to create a policy from scratch, please review the *Procedure* section below for more details.

Procedure

Please reference the [VTO User Guide for Associates](#) for more details on how to log in and use the VTO.

You can link to PolicyCenter directly: <https://clpolicycentertraining.nationwide.com/>

For this scenario, you can add a mortgagee to a policy in one of two ways:

- Set up an account, create and issue your own policy, then follow the steps below to add a mortgagee
 - **(Please refer to: Set-Up an Account in ClearQuoteSM and Create a Quote in ClearQuoteSM scenario cards)**
- You can select and search from the list of Practice Accounts

| Practice Accounts | | | |
|-------------------|------------|-----|------------|
| 1. | 3501639616 | 16. | 3501639604 |
| 2. | 3501639612 | 17. | 3501639628 |
| 3. | 3501639614 | 18. | 3501639629 |
| 4. | 3501639611 | 19. | 3501639627 |
| 5. | 3501639624 | 20. | 3501639634 |
| 6. | 3501639618 | 21. | 3501639630 |
| 7. | 3501639609 | 22. | 3501639667 |
| 8. | 3501639617 | 23. | 3501639666 |
| 9. | 3501639625 | 24. | 3501639672 |
| 10. | 3501639608 | 25. | 3501639671 |
| 11. | 3501639622 | 26. | 3501639669 |
| 12. | 3501639619 | 27. | 3501639675 |
| 13. | 3501639621 | 28. | 3501639673 |
| 14. | 3501639623 | 29. | 3501639670 |
| 15. | 3501639626 | 30. | 3501639662 |



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Scenario Card:

Navigate to the policy you wish to add a mortgagee to in PolicyCenter. To navigate to the policy, complete the following:

- 1) Click in the **Search** drop-down menu.
- 2) Select **Accounts** from the drop-down menu.

Search Accounts Screen

- 3) Enter the applicable account number in the **Account Number** field.
- 4) Click the **Search** button.
- 5) Click on the **Account Number** to navigate to the Account Summary screen.

Account Summary Screen

- 6) Scroll down and select the **Policy #**

Summary screen:

- 7) Click the **Actions** button.
- 8) Select **Change Policy** from the drop-down menu.

Start Policy Change screen:

- 9) Select an **Effective Date** after 12/01/2021
- 10) Click the **Next** button to go to the *Policy Info* screen.

Policy Info screen

- 11) Select **Buildings and Classifications** from the left navigation menu.

Buildings and Classifications screen:

- 12) Scroll down to view the **Mortgagees and Loss Payees** section.
- 13) Click the **Add** drop-down button.
- 14) Select **New Company** from the drop-down menu.

Add New Mortgagee or Loss Payee Screen

- 15) Click the **Interest Type** drop-down menu and select Mortgagee.
- 16) Enter **Loan Number** (if known)
- 17) Enter the **Name** field. (e.g. Nationwide Advantage Mortgage)
- 18) Enter the **Address 1** field. (e.g. PO Box 919010)
- 19) Enter the **Zip Code** field. (e.g. 50391)
- 20) Enter the **City** field. (e.g. Des Moines)
- 21) Select a state from the **State** drop-down menu. (e.g. Iowa)
- 22) Click the **OK** button.

Buildings and Classifications screen

- 23) Click the **Quote** button.

Quote screen

- 24) Click **Issue Policy**.
- 25) Click **OK** in the pop-up