

# Add or Remove a Lienholder/ Leaseholder on an Auto Policy

## PolicyCenter



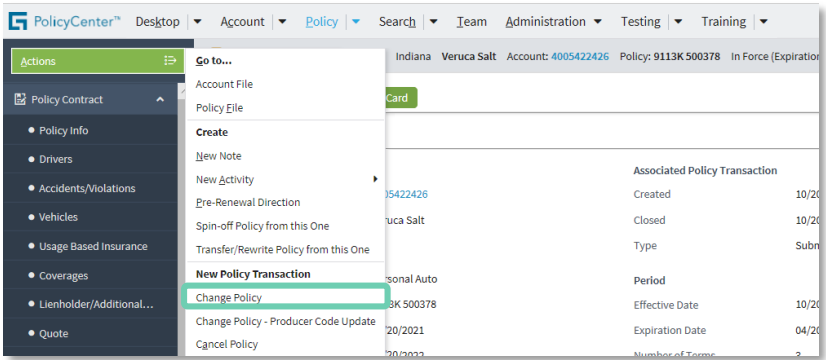
### Description:

This job aid reviews how to add a Lienholder to an existing Auto or PowerSports policy. This job aid reviews how to do the following from an existing policy:

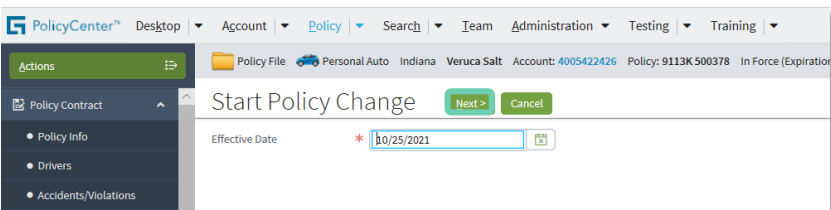
- [Add a Lienholder](#)
- [Remove a Lienholder](#)

### Add a Lienholder

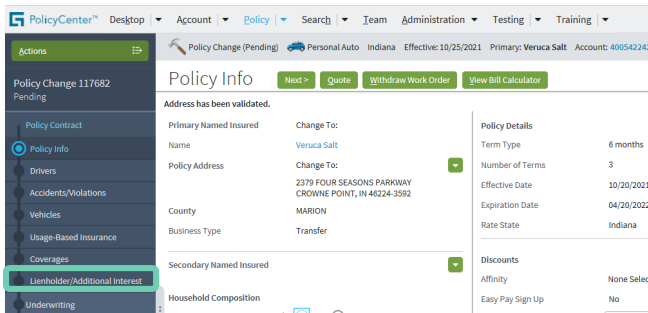
#### Step 1

Action	Screen
<p>Open an existing policy.</p> <ul style="list-style-type: none"> <li>Click the <b>Actions</b> button.</li> <li>Select “<b>Change Policy</b>” from the drop-down menu.</li> </ul>	

#### Step 2

Action	Screen
<p>On the <i>Start Policy Change</i> screen:</p> <ul style="list-style-type: none"> <li>The <b>Effective Date</b> defaults to the current date.</li> <li>Click the <b>Next &gt;</b> button.</li> </ul>	

#### Step 3

Action	Screen
<p>On the <i>Policy Info</i> screen:</p> <ul style="list-style-type: none"> <li>Click the <b>Lienholder/Additional Interest</b> link.</li> </ul>	

## Job Aid Process (Add a Lienholder Cont.) :

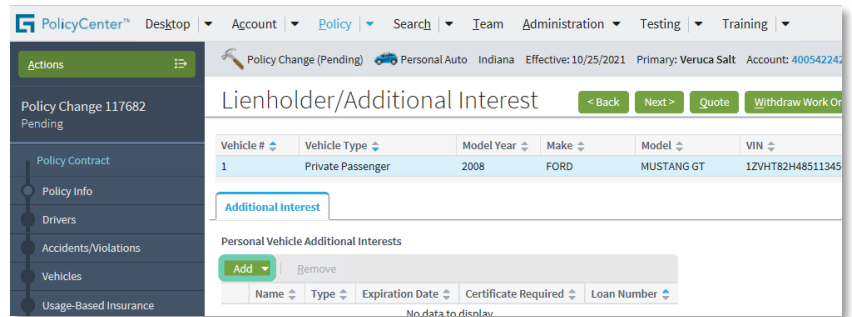
### Step 4

#### Action

On the *Lienholder/Additional Interest* screen:

- Click the **Add** button.

#### Screen



### Step 5

#### Action

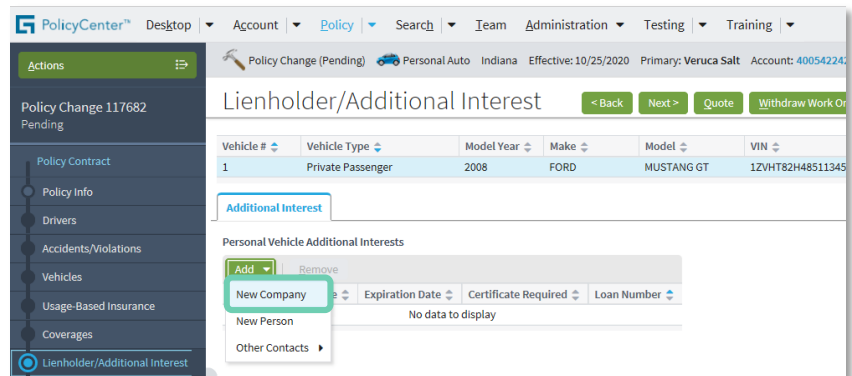
From the **Add** drop-down list:

- Check to see if the Additional Interest contact exists under the “**Other Contacts**” before creating a new contact.

To create a new contact:

- Select “**New Company**” from the drop-down list.

#### Screen



### Step 6

#### Action

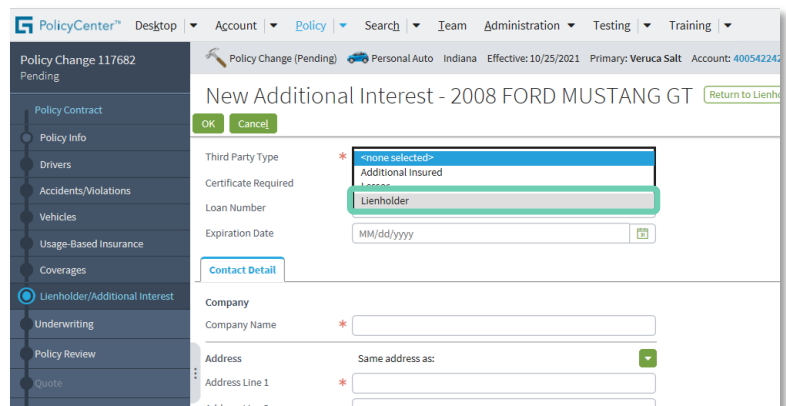
On the *New Additional Interest* screen:

- Click the down arrow to the right of the **Third-Party Type** field.
- Select the appropriate **Third-Party Type** from the drop-down list.

In this example:

- Select “**Lienholder**” from the drop-down list.

#### Screen




## Job Aid Process (Add a Lienholder Cont.) :

### Step 7

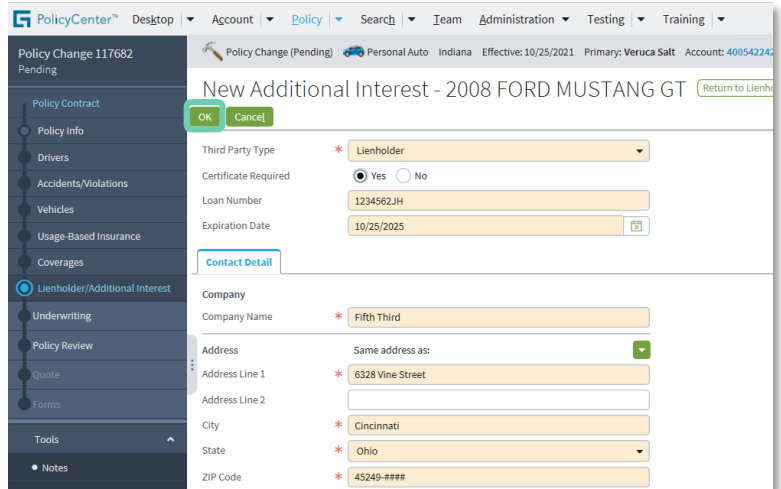
#### Action

For the Lienholder:

- Enter the necessary information in the required fields.
- Click the **OK** button.

**Note:** The **Certificate Required** field should be marked as **Yes** when you want to send the information to the Lienholder.

#### Screen



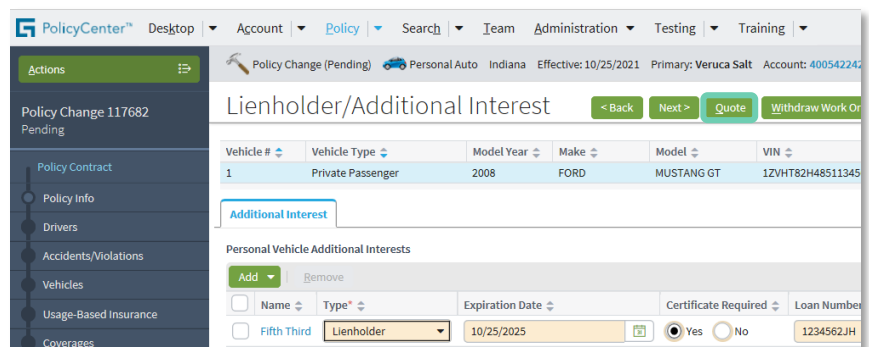
### Step 8

#### Action

On the *Lienholder/Additional Interest* screen, the new lienholder displays in the *Personal Vehicle Additional Interests* section.

- Click the **Quote** button.

#### Screen



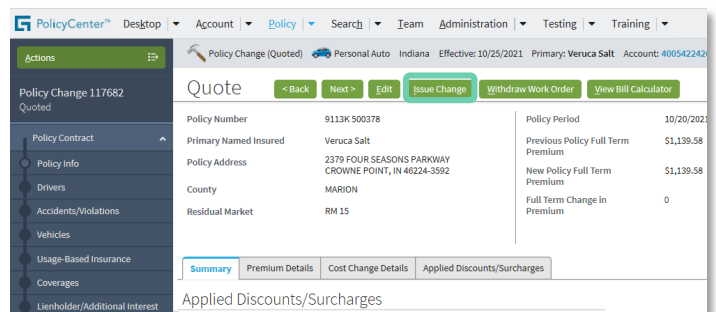
### Step 9

#### Action

On the *Quote* screen:

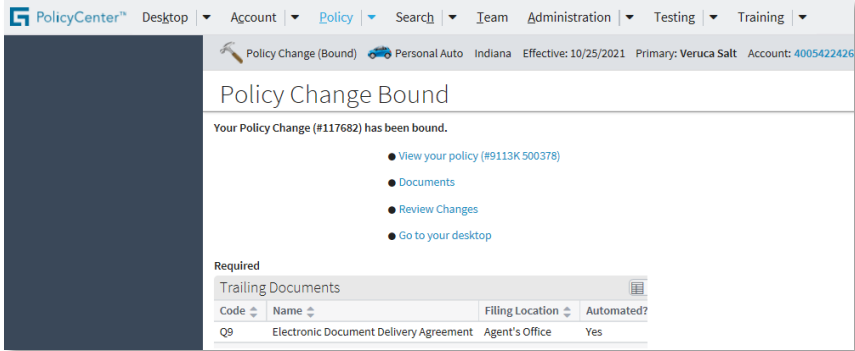
- Click the **Issue Change** button.
- Click the **OK** button on the confirmation pop-up window.

#### Screen



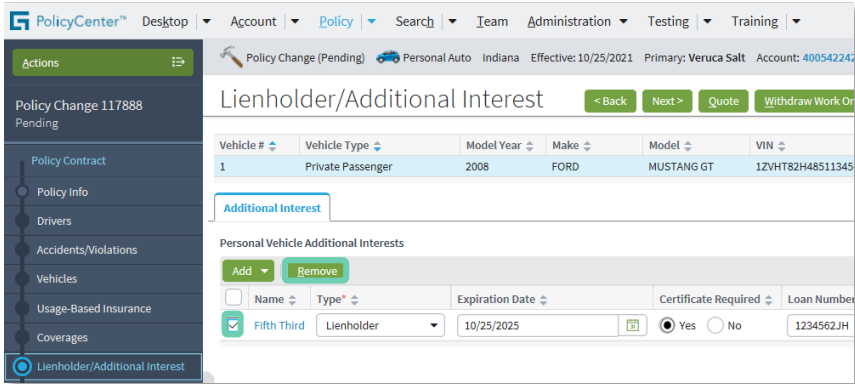

## Job Aid Process (Add a Lienholder Cont.) :

### Step 10

Action	Screen
You have successfully added an Additional Interest to an auto policy.	

## Remove a Lienholder

### Step 1

Action	Screen
<p>To remove the lienholder, on the <i>Lienholder/Additional Interest</i> screen:</p> <ul style="list-style-type: none"> <li>Select the checkbox to the left of the lienholder name.</li> <li>Click the <b>Remove</b> button.</li> </ul>	

### Step 2

Action	Screen
<p>After confirming the lienholder has been removed, you may:</p> <ul style="list-style-type: none"> <li>Quote and issue the policy change.</li> </ul>	