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:

- o Add a Lienholder
- o <u>Remove a Lienholder</u>

Add a Lienholder



On the *Start Policy Change* screen:

Click the **<u>N</u>ext** > button.

• The **Effective Date** defaults to the current date.

Screen					
F PolicyCenter	' Desktop ▼ Account ▼ Policy ▼ Search ▼ Ieam Administration ▼ Testing ▼ Training ▼				
Actions	😥 📄 Policy File 🚓 Personal Auto Indiana Veruca Salt Account: 4005422426 Policy: 9113K 500378 In Force (Expiration				
Policy Contract	🔨 - Start Policy Change 🛛 🔤 🕬				
 Policy Info 	Effective Date * 10/25/2021				
 Drivers 					
 Accidents/Violati 	ons				

Step 3 Action Screen On the *Policy Info* screen: FolicyCenter" Desktop | • Account | • Policy | • Search | • Ieam Administration • Testing | • Training | • 🔨 Policy Change (Pending) Personal Auto Indiana Effective: 10/25/2021 Primary: Veru Policy Info Next > Quote Withdraw Work Order View Bill Calculator Click the Lienholder/Additional Address has been validated. Interest link. Primary Named Insured Change To: Policy Details Veruca Salt Term Type 6 month Name Policy Address Change To: -Number of Terms 3 2379 FOUR SEASONS PARKWAY CROWNE POINT, IN 46224-3592 10/20/20 Effective Date Expiration Date 04/20/20 MARION Rate State Indiana Business Type Transfer -Affinity None Se Easy Pay Sign Up



Job Aid Process (Add a Lienholder Cont.) :

Step 4

Action	Screen
On the <i>Lienholder/Additional Interest</i> screen:	PolicyCenter* Desktop Account Policy Search Team Administration Testing Training Training Actions Policy Change (Pending) Personal Auto Indiana Effective: 10/25/2021 Primary: Veruca Salt Account: 400542247
• Click the Add button.	Policy Change 117662 Lienholder/Additional Interest <back< td=""> Not > Quote Withdraw WorkOr Policy Contract Vehicle # ‡ Vehicle Type ‡ Model Year ‡ Make ‡ Model ‡ VIN ‡ Policy Contract Private Passenger 2008 FORD MUSTANG GT 12/VH32H48511345 Policy Info Accidents/Molations Personal Vehicle Additional Interests Personal Vehicle Additional Interests Accidents/Molations Vehicles Bemove Certificate Required ‡ Loan Number ‡ Usage-Based Insurance No data to disclaw No data to disclaw No data to disclaw</back<>

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 F PolicyCenter" Desktop - Account - Policy - Search - Team Administration - Testing - Training -🔨 Policy Change (Pending) 🚗 Personal Auto Indiana Effective: 10/25/2020 Primary: Veruca Salt Account: 400542243 Lienholder/Additional Interest < Back Next > Quote Withdraw Work Or Vehicle # 💠 Vehicle Type 💠 Model Year 💠 Make 💠 Model 😄 VIN 🚖 17VHT82H48511345 1 Private Passenger 2008 FORD MUSTANG GT Additional Interest Personal Vehicle Additional Interests Accidents/Violations Add 🔻 Vehicles New Company e 🗢 Expiration Date 💠 Certificate Required 💠 Loan Number 🜩 Usage-Based Insurance No data to display New Person Other Contacts

Step 6

Action Screen On the New Additional Interest screen: F PolicyCenter" Desktop - Account - Policy - Search - Ieam Administration - Testing - Training -🔨 Policy Change (Pending) 🚒 Personal Auto Indiana Effective: 10/25/2021 Primary: Veruca Salt Account: 40054224 ٠ Click the down arrow to the right of the New Additional Interest - 2008 FORD MUSTANG GT Return to Lie Third-Party Type field. OK Cancel Third Party Type Additional Insured Certificate Required Select the appropriate **Third-Party** • Lienholder Loan Number Type from the drop-down list. Expiration Date MM/dd/yyyy 3 Contact Detail In this example: Company Company Name -Select "Lienholder" from the drop-Address Same address as: Address Line 1 down list.



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Job Aid Process (Add a Lienholder Cont.) :

Step 7

Action	Screen					
For the Lienholder:	☐ PolicyCenter® Desktop ▼ Account ▼ Policy ▼ Search ▼ Ieam Administration ▼ Testing ▼ Training ▼					
• Enter the necessary information in the	Policy Change 117682 Pending Policy Change (Pending) Personal Auto Indiana Effective: 10/25/2021 Primary: Veruca Salt Account: 400542247 New Additional Interest - 2008 FORD MUSTANG GT Return to Liente					
required fields.	Policy Contract OK Cancel Policy Info Drivers Third Party Type * Lienholder					
• Click the OK button.	Accidents/Nolations Certificate Required Yes No Vehicles Loan Number 1234552.1H Use Substance Expiration Date 10/25/2025					
Note: The Certificate Required field	Coverages Contact Detail					
should be marked as Yes when you want to send the information to the Lienholder.	Uenholds://ddfitional interest Company Underwriting Company Name Fifth Third					
	Policy Review Address Same address as: Quote Address Line 1 * 6328 Vine Street					
	Tools Address Line 2 City * Cincinnati State * Ohio					
	Notes ZIP Code * 45249-####					

Step 8

Action

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

• Click the **Quote** button.



Step 9							
Action	Screen						
On the <i>Quote</i> screen:	PolicyCenter [®] Desktop Account Policy Search Ieam Administration Testing Training Account Advance Advan						
• Click the Issue Change button.	Policy Change 117682 QUOTE <back next=""> Edit Essee Change Withdraw Work Order View Bill Calculator Policy Number 9113K 500378 Policy Period 10/20/202</back>						
• Click the OK button on the confirmation pop-up window.	Princy Contract Primary Named Insured Vervice Sait Previous Policy Intil Term \$1,139.35 Policy Info Policy Address 2739 F20U8 S2ASONS PARKWAY CROWNE POINT, IN 46224-3592 Previous Policy Full Term \$1,139.35 Policy Address County MARION Heer Volicy Full Term \$1,139.35 Accidents, Violations Residual Market RM 15 Premium \$1,139.35						
	Usage-Based Insurance Coverages Lienholder/Additional Interest						





Job Aid Process (Add a Lienholder Cont.) :

Step 10

Action	Screen
You have successfully added an Additional	
Interest to an auto policy.	☐ PolicyCenter [®] Desktop ▼ Account ▼ Policy ▼ Search ▼ Ieam Administration ▼ Testing ▼ Training ▼
	🔨 Policy Change (Bound) 🚒 Personal Auto Indiana Effective: 10/25/2021 Primary: Veruca Salt Account: 4005422426
	Policy Change Bound
	Your Policy Change (#117682) has been bound.
	View your policy (#9113K 500378)
	Documents
	Review Changes
	● Go to your desktop
	Required
	Code Name
	Q9 Electronic Document Delivery Agreement Agent's Office Yes

Remove a Lienholder

Step 1	
Action	Screen
 To remove the lienholder, on the <i>Lienholder/Additional Interest</i> screen: Select the checkbox to the left of the lienholder name. Click the Remove button. 	PolicyCenter* Desktop Account Policy Change (Pending) Policy Contract Policy Contract Policy Info Policy Contract Policy Info Policy Info Policy Contract Policy Info

Step 2

Action	Screen						
After confirming the lienholder has been removed, you may:	PolicyCenter** Desktop Account Policy Search Ieam Administration Transformation Actions PolicyChange (Pending) Personal Auto Indiana Effective: 10/25/2021 Primary: Veruca Salt 						aining ▼ t Account: 400542245
• Quote and issue the policy change.	Policy Change 117888 Pending Policy Contract Policy Info	Lienho	Vehicle Type 🖨	l Interest ModelYear ≑ 2008	< Back Make \$ FORD	Next > Quote Model MUSTANG GT	Withdraw Work Or VIN \$ 1ZVHT82H48511345
	Drivers Additional interest Accidents/Violations Personal Vehicle Additional Interests Vehicles Add Usage-Based Incurance Name Name Type No data to display						

