

Add Mortgagee (Third Party) to a Property Policy

PolicyCenter



This job aid reviews how to add a Third Party Mortgagee to a Property policy. This job aid starts at the Policy Info screen during the submission or policy change.

To avoid potential delays in processing payments and correspondence to mortgagees, search for an existing third party using the broadest search before adding a third party to the list.


Step 1

Action	Screen
<p>On the Policy Info screen:</p> <p>Click the Mortgagee/Billing link.</p>	

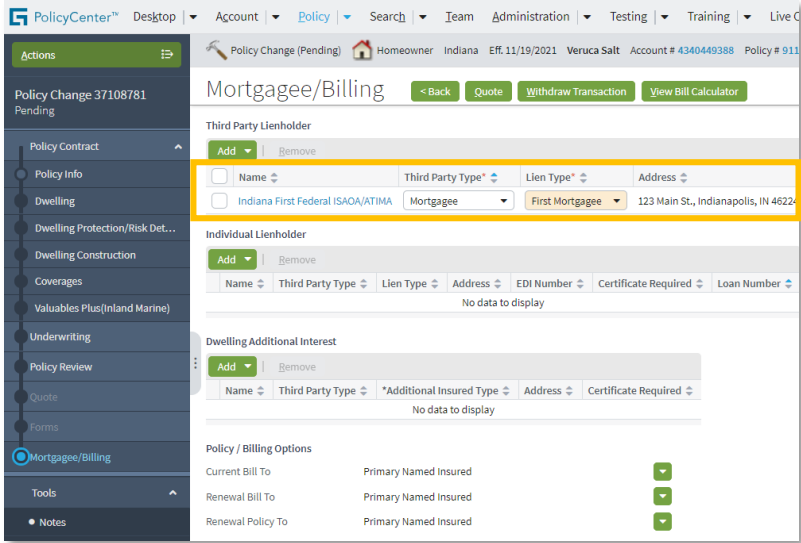
Step 2

Action	Screen
<p>In the Third Party Lienholder section:</p> <p>Click the Add button.</p> <p>Select Add Third Party lienholder from the drop-down list.</p>	

Step 3

Action	Screen															
<p>On the Search Third Party screen, search to find if the mortgagee information is already included.</p> <p>Selection should be made from the database to avoid creating duplicates whenever possible.</p> <p>In this example:</p> <p>Enter “Wells” in the Name field. The best practice is to search with as few characters as possible. This will return the broadest search results.</p> <p>Click the Search button.</p> <p>If the Third Party is found, select it from the Search Results section at the bottom of the page. Review the Important Information section in the right column to ensure the correct selection is made.</p> <p>Click the Select button next to the appropriate result.</p> <div> Hint: You must contact the Personal Lines Service Center to request the Third Party information be added or modified by the gatekeeper IF:</div> <div><p>The Third Party is not found and the message “The search returned zero results” is returned</p><p>The Third Party is found, but the information (Legal Information, Address) is incorrect.</p></div>	<div><div>Search Third Party Return to Mortgagee/Billing</div><div><div><div><div><input checked="" type="radio"/> Name</div><div>WELLS</div></div><div><div><input type="checkbox"/> Exact Name Match</div><div></div></div><div><div>Address Line 1</div><div></div></div><div><div>City</div><div></div></div><div><div>State</div><div><none></div></div><div><div>Country</div><div>* United States of America</div></div><div><div>Zip Code</div><div>#####-####</div></div><div><div><input type="radio"/> Party Number</div><div></div></div><div><div><input type="radio"/> EDI Number</div><div></div></div></div><div><div>Search</div><div>Reset</div></div></div><div><table><tr><th></th><th>Name</th><th>Legal Information</th><th>Address</th><th>City</th></tr><tr><td>Select</td><td>WELLS FARGO BANK NA 936 ATIMA</td><td>ISAOA/ATIMA</td><td>PO BOX 100515</td><td>FLORENCE</td></tr><tr><td>Select</td><td>WELLS FARGO BANK NA #708</td><td>ISAOA/ATIMA</td><td>PO BOX 5708</td><td>SPRINGFIELD</td></tr></table></div></div> <div><div><div>!</div><div>IMPORTANT INFORMATION:</div><div><p>Standardized Third Party entries allow Nationwide to electronically communicate with financial institutions, reducing print/postage and check processing expense. Manually adding new third parties leads to paper declarations/invoice and paper check processing (non-desirable outcome.)</p><p>If multiple entries are found:</p><ul style="list-style-type: none">Preferred selection should have ALL CAPS vs Standard CapitalizationAdditional Information and C/O should be in the appropriate fields in PolicyCenterLegal abbreviations are interchangeable and using any one of these combinations protects the mortgagee's financial interestThe abbreviation is typically not used within the database, when searching city use ‘Fort Worth’ instead of ‘Ft Worth’</div></div></div>		Name	Legal Information	Address	City	Select	WELLS FARGO BANK NA 936 ATIMA	ISAOA/ATIMA	PO BOX 100515	FLORENCE	Select	WELLS FARGO BANK NA #708	ISAOA/ATIMA	PO BOX 5708	SPRINGFIELD
	Name	Legal Information	Address	City												
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Select	WELLS FARGO BANK NA #708	ISAOA/ATIMA	PO BOX 5708	SPRINGFIELD												

Step 4

Action	Screen
<p>On the Mortgagee/Billing screen, after the correct mortgage information is selected (or added by PLSC):</p> <p>Select the correct Mortgagee information for Third Party Type, and Lien Type.</p> <p>For the main/first mortgage, select First Mortgagee from the Lien Type field.</p> <p>For a second and any subsequent mortgages, select Mortgagee from the Lien Type field.</p> <p>Proceed with the submission or policy change as usual.</p>	

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