

Add a Third-Party Designee to a Policy

PolicyCenter



Description:

This job aid details the step to add a Third-Party Designee (Caretaker) to a policy in PolicyCenter.

! **NOTE:** Adding a Third-Party Designee is only available in CA, CT, NJ, and NY.

Step 1

Action

On the *Policy Info* screen:

- Select the checkbox to the right of the **Third-Party Designee (Caretaker)** field.

Screen

The screenshot shows the 'Policy Info' screen in PolicyCenter. The 'Secondary Named Insured' section is expanded, and the 'Third Party Designee (Caretaker)' checkbox is highlighted with a green box. The primary named insured is Bruce Salt, and the policy address is 438 GARFIELD HEIGHTS PL, BROOKLYN, NY 11209. The business type is 'New Business'.

Step 2

Action

A new section on the *Policy Info* screen displays.

- Complete all required information, including:
 - **First Name**
 - **Last Name**

Screen

The screenshot shows the 'Policy Info' screen in PolicyCenter. The 'Third Party Designee (Caretaker)' section is expanded, and the 'First Name' and 'Last Name' fields are highlighted with a green box. The first name is 'Samantha' and the last name is 'Salt'.

Job Aid Process (Cont.) :

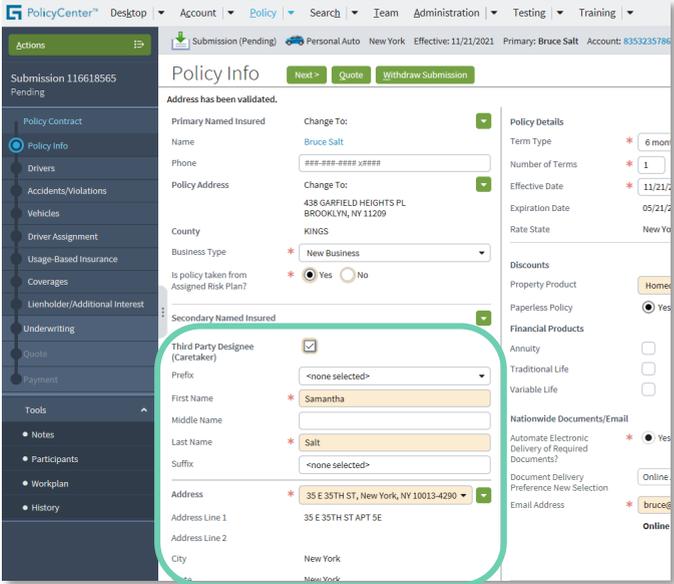
Step 3

Action	Screen
<p>To complete the address fields:</p> <ul style="list-style-type: none"> Click the arrow to the right of the Address field. Select New Address from the drop-down list. 	<p>The screenshot shows the 'Policy Info' screen in PolicyCenter. The 'Address' field is highlighted with a green box, and a dropdown menu is open showing 'New Address' as an option. Other fields like 'Primary Named Insured', 'Policy Address', and 'Secondary Named Insured' are also visible.</p>

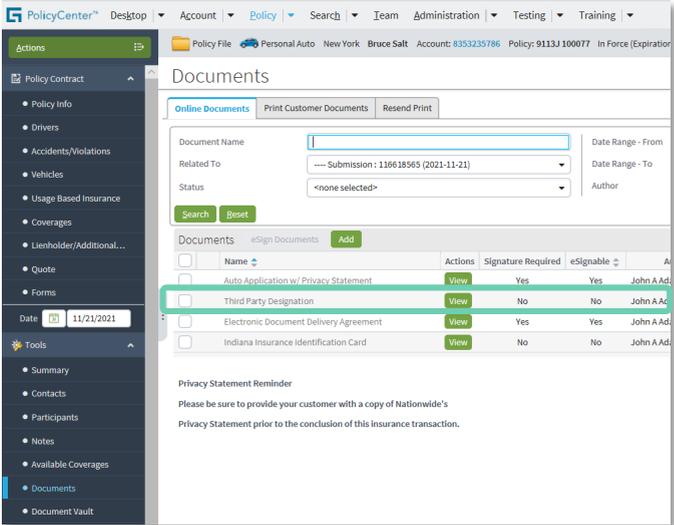
Step 4

Action	Screen
<p>The <i>Third-Party Designee Address</i> screen displays.</p> <ul style="list-style-type: none"> Complete all required address fields. Click the OK button. 	<p>The screenshot shows the 'Third Party Designee Address' screen. The 'Address Details' section is highlighted with a green box, showing fields for 'Address Line 1', 'Address Line 2', 'City', 'State', and 'ZIP Code'. The 'OK' button is also highlighted in a green box.</p>

Job Aid Process (Cont.) : Step 5

Action	Screen
<p>You have successfully added a Third-Party Designee (Caretaker).</p> <p>You may now complete the policy set-up.</p>	

Step 6

Action	Screen																									
<p>Once the policy is bound and payment submitted, you can process a <i>Third-Party Designation</i> trailing document.</p>	 <table border="1"> <thead> <tr> <th>Name</th> <th>Actions</th> <th>Signature Required</th> <th>eSignable</th> <th>Author</th> </tr> </thead> <tbody> <tr> <td>Auto Application w/ Privacy Statement</td> <td>View</td> <td>Yes</td> <td>Yes</td> <td>John A. Ad...</td> </tr> <tr> <td>Third Party Designation</td> <td>View</td> <td>No</td> <td>No</td> <td>John A. Ad...</td> </tr> <tr> <td>Electronic Document Delivery Agreement</td> <td>View</td> <td>Yes</td> <td>Yes</td> <td>John A. Ad...</td> </tr> <tr> <td>Indiana Insurance Identification Card</td> <td>View</td> <td>No</td> <td>No</td> <td>John A. Ad...</td> </tr> </tbody> </table>	Name	Actions	Signature Required	eSignable	Author	Auto Application w/ Privacy Statement	View	Yes	Yes	John A. Ad...	Third Party Designation	View	No	No	John A. Ad...	Electronic Document Delivery Agreement	View	Yes	Yes	John A. Ad...	Indiana Insurance Identification Card	View	No	No	John A. Ad...
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