

Editing Insured's Personal Information

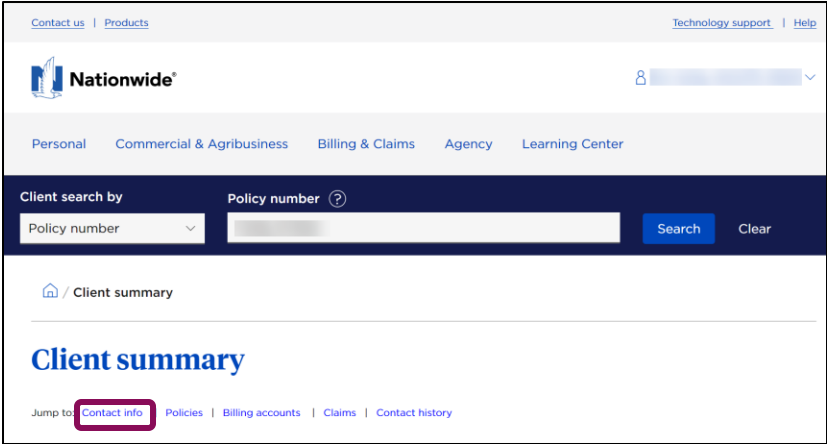
Agent Center



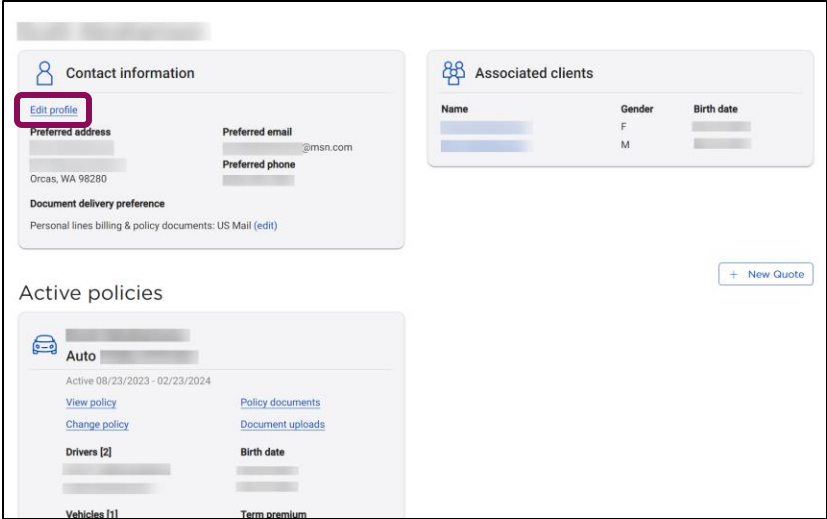
Description

This job aid describes how to edit an insured's personal information in Agent Center.

Step 1

Action	Screen
After searching for the customer, the "Client Summary" screen will appear. From the "Client Summary" screen: <ul style="list-style-type: none">Select "Contact info".	

Step 2

Action	Screen
In the "Contact information" section: <ul style="list-style-type: none">Select "Edit profile".	



Step 3

Action	Screen
<p>On the “Edit profile information” screen:</p> <ul style="list-style-type: none">• Select the appropriate tab to add or update.<ul style="list-style-type: none">○ Personal Information<ul style="list-style-type: none">▪ Legal names, preferred names, nicknames, etc.○ Addresses○ Phone Numbers○ Email Addresses• Select “Continue”.	

Step 4

Action	Screen
<p>Confirm that the changes you entered are correct and then select “Submit”.</p>	

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