

How to Manage the Activity “Contact XXXX was Changed”

PolicyCenter



Description

This activity is system generated when a back-dated change is made to a Driver, Named Insured, or Contact. To complete the activity, review the notes associated and contacts information.

Step 1

Action

On the *My Activities* screen, the activity “**Contact XXXX was changed**” displays.

- Select the **Subject** link.

Screen

Assign	Complete	Print / Export	All open	Due Date	Priority	Status	Subject	ID
<input type="checkbox"/>				10/23/2021	Urgent	Open	Verify coverage	
<input type="checkbox"/>				10/20/2021	Normal	Open	(A_ACT_113) Usage Based Insurance Program, Discount May be Removed	
<input type="checkbox"/>				10/20/2021	Normal	Open	(A_ACT_113) Usage Based Insurance Program, Discount May be Removed	
<input type="checkbox"/>				10/24/2021	Normal	Open	(A_ACT_113) Usage Based Insurance Program, Discount May be Removed	
<input type="checkbox"/>				11/04/2021	Normal	Open	(A_ACT_86) Contact was changed	

Step 2

Action

Once you select the activity link, the *Activity Detail* section opens at the bottom of the screen.

- Select the **Edit** button to open the activity.

Screen

Activity Detail

Assign Edit Close Worksheet View Notes

Activity Info

Subject	(A_ACT_86) Contact was changed
Description	You have updated the contact information of [redacted] in a back dated change. These changes have only been applied to this policy; please review to determine if any change is required at the account level.
Priority	Normal
Status	Open
Mandatory	Yes
Recurring	No
Target Date	11/04/2021
Escalation Date	11/06/2021

New Note

Topic	Contact changes for [redacted]
Related To	---- Policy Change : [redacted] (2021-04-16)
Text	Changed Last Name on Driver from [redacted]

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Step 3

Action	Screen
<p>To complete the activity:</p> <ul style="list-style-type: none"> Review the gray Text field. Select the Complete button. 	

Step 4

Action	Screen
<p>Due to the back-dated change, the <i>Contacts</i> information in the system may or may not need to be updated to the correct Last Name.</p> <ul style="list-style-type: none"> If the Last Name needs to be changed, update it in the Contacts (found at the Account level) and select the Update button. If the Last Name does not need to be changed, select the Cancel button. 	

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