Description

This job aid reviews how to change the mailing address on a policy. Changes to a policyholder's mailing address can include corrections to the street address and/or apartment/unit number, entering a new street address, corrections to the policyholder's city/municipality/entity, or additions/corrections to a zip code.

Note: This change updates only the mailing address of the policy; it does not update the location exposure address.

Any changes to an existing policy require a new policy transaction, re-quoting the policy, and binding the changes.

Step 1 Action Screen On the Summary screen: ΎΕ. Desktop | • Account | • Policy | • Search | • Team Administration | • Testing | • Training | • Indiana Veruca Salt Account: 8052332521 Policy: 9113HR027389 In Force (Exp. 04/24 <u>G</u>o to... Click the Actions button. Account File Policy Contract Policy <u>F</u>ile Policy Info Create Select Change Policy from the drop-New Note • Dwelling Associated Policy Transaction down menu. New Activity Dwelling Protection/R Created 04/24/2022 Pre-Renewal Direction • Dv elling Constr uca Salt Closed 04/24/2022 New Policy Transaction Coverages Туре Submission Change Policy • Valuables Plus(Inland . Change Policy - Producer Code Update sonal Property Period Cancel Policy Ouote L3HR027389 Effective Date 04/24/2022 Renew Policy • Forms 24/2022 Expiration Date 04/24/2023 Number of Terms Primary Named Insured 1 Mortgagee/Billing

Step 2	
Action	Screen
On the Start Policy Change screen:	Desktop • Account • Policy • Search • Ieam Administration • Testing • Training •
• Enter the Effective Date . The Effective Date defaults to today's date but may be changed.	Actions Image: Policy File for Homeowner Indiana Veruca Salt Account: 8052332521 Policy: 9113HR027389 In Force (Exp. 04/24 Policy Contract Start Policy Change Policy Info Effective Date • Policy Info Effective Date
Click the Next button.	Dwelling Protection/R Dwelling Construction Conversities

Change Mailing Address



Step 3

Action	Screen
 On the <i>Policy Info</i> screen: Click the arrow button to the right of the Change To: field. 	Desktop Account Policy Search Ieam Administration Testing Training Actions Policy Change (Pending) Policy Info Next> Quote Withdraw Transaction View Bill Calculator Policy Change 991799 Policy Info Next> Quote Withdraw Transaction View Bill Calculator Address has been validated. Primary Named Insured Change To: Name Veruca Salt Policy Info Next> Quote Veruca Salt Policy Info Next> Quote Veruca Salt Policy Address Change To: TopPer Hult E: N42703-1028
	Dwelling Construction County VIGO Coverages Business Type New Business Valuables Pfus(Inland Marine)

Step 4

Action

There are two ways to change a mailing address: Create a new address or edit the current address.

New Address:

- Selecting the **New Address** option adds a new address for the Primary Named Insured.
- If a new address is added, then the new address, as well as any prior addresses, displays in the address drop-down list (possibly appearing in other areas such as contacts, policies, location exposures, etc.).

Edit Current Address:

- Selecting the Edit Current Address option edits the current address on this policy, as well as any other linked policies at the same time.
- The prior address (the address before editing) does not display in any address drop-down lists.

In this example, **New Address** has been selected from the drop-down.



Change Mailing Address



Step 5

Action



Step 6

Action	Screen		
Any change to a policy requires the policy to be re-quoted.	Desktop Actions i∋	Account Policy Policy Change (Pending) Billing Account: Inquiry	Search ▼ Ieam Administration ▼ Testing ▼ Training ▼ . Homeowner Indiana Effective:04/26/2022 Veruca Salt Account: 8052332521 Policy:
Click the Quote button.	Policy Change 991799 Pending	Policy Info 🛛 🔊	ext > Quote Withdraw Transaction View Bill Calculator
	Policy Contract	Address has been validated.	_
	Policy Info	Primary Named Insured	Change To:
	Dwelling	Name	Veruca Salt
		Policy Address	Change To:
	Dwelling Protection/Risk Det		2379 FOUR SEASONS PKWY
	Dwelling Construction	County	CROWN POINT, IN 40307-9342
	Coverages	County	
	Valuables Plus(Inland Marine)	Business Type	New Business

Step 7

Action	Screen
 On the <i>Quote</i> screen: Click the Issue Change button. Click the OK button on the confirmation pop-up message. 	Coverages Valuables Plus(Inland Marine) Property Line - Policy Type Homeowner Valuables Plus(Inland Marine) Property Line - Policy Type Homeowner Valuables Plus(Inland Marine) Property Line - Policy Type Homeowner Valuables Plus(Inland Marine) Property Line - Policy Type Homeowner Valuables Plus(Inland Marine) Property Line - Policy Type Homeowner Valuables Plus(Inland Marine) Valuables Plus(
	Applied Discounts/Surcharges

Change Mailing Address



Step 8	
Action	Screen
You have successfully changed the policy mailing address.	Desktop Agcount Policy Search Ieam Administration Testing Training Image: Training Image: Training<!--</td-->
	Your Policy Change (#991799) has been bound. • View your policy (#9113HR027389) • Documents • Review Changes • Go to your desktop

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