

# Add or Remove a Lienholder/ Leaseholder on an Auto Policy

## PolicyCenter



### Description:

This job aid reviews how to add a Lienholder to an existing Auto or PowerSports policy. This job aid reviews how to do the following from an existing policy:

- [Add a Lienholder](#)
- [Remove a Lienholder](#)

### Add a Lienholder

#### Step 1

Action	Screen
<p>Open an existing policy.</p> <ul style="list-style-type: none"> <li>• Click the <b>Actions</b> button.</li> <li>• Select “<b>Change Policy</b>” from the drop-down menu.</li> </ul>	

#### Step 2

Action	Screen
<p>On the <i>Start Policy Change</i> screen:</p> <ul style="list-style-type: none"> <li>• The <b>Effective Date</b> defaults to the current date.</li> <li>• Click the <b>Next &gt;</b> button.</li> </ul>	

#### Step 3

Action	Screen
<p>On the <i>Policy Info</i> screen:</p> <ul style="list-style-type: none"> <li>• Click the <b>Lienholder/Additional Interest</b> link.</li> </ul>	

## Job Aid Process (Add a Lienholder Cont.) :

### Step 4

Action	Screen
<p>On the <i>Lienholder/Additional Interest</i> screen:</p> <ul style="list-style-type: none"> <li>Click the <b>Add</b> button.</li> </ul>	

### Step 5

Action	Screen
<p>From the <b>Add</b> drop-down list:</p> <ul style="list-style-type: none"> <li>Check to see if the Additional Interest contact exists under the <b>“Other Contacts”</b> before creating a new contact.</li> </ul> <p>To create a new contact:</p> <ul style="list-style-type: none"> <li>Select <b>“New Company”</b> from the drop-down list.</li> </ul>	

### Step 6

Action	Screen
<p>On the <i>New Additional Interest</i> screen:</p> <ul style="list-style-type: none"> <li>Click the down arrow to the right of the <b>Third-Party Type</b> field.</li> <li>Select the appropriate <b>Third-Party Type</b> from the drop-down list.</li> </ul> <p>In this example:</p> <ul style="list-style-type: none"> <li>Select <b>“Lienholder”</b> from the drop-down list.</li> </ul>	



## Job Aid Process (Add a Lienholder Cont.) :

### Step 7

Action	Screen
<p>For the Lienholder:</p> <ul style="list-style-type: none"> <li>Enter the necessary information in the required fields.</li> <li>Click the <b>OK</b> button.</li> </ul> <p><b>Note:</b> The <b>Certificate Required</b> field should be marked as <b>Yes</b> when you want to send the information to the Lienholder.</p>	

### Step 8

Action	Screen
<p>On the <i>Lienholder/Additional Interest</i> screen, the new lienholder displays in the <i>Personal Vehicle Additional Interests</i> section.</p> <ul style="list-style-type: none"> <li>Click the <b>Quote</b> button.</li> </ul>	

### Step 9

Action	Screen
<p>On the <i>Quote</i> screen:</p> <ul style="list-style-type: none"> <li>Click the <b>Issue Change</b> button.</li> <li>Click the <b>OK</b> button on the confirmation pop-up window.</li> </ul>	



## Job Aid Process (Add a Lienholder Cont.) :

### Step 10

Action	Screen								
You have successfully added an Additional Interest to an auto policy.	<table border="1"> <thead> <tr> <th>Code</th> <th>Name</th> <th>Filing Location</th> <th>Automated?</th> </tr> </thead> <tbody> <tr> <td>Q9</td> <td>Electronic Document Delivery Agreement</td> <td>Agent's Office</td> <td>Yes</td> </tr> </tbody> </table>	Code	Name	Filing Location	Automated?	Q9	Electronic Document Delivery Agreement	Agent's Office	Yes
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Q9	Electronic Document Delivery Agreement	Agent's Office	Yes						

## Remove a Lienholder

### Step 1

Action	Screen																							
<p>To remove the lienholder, on the <i>Lienholder/Additional Interest</i> screen:</p> <ul style="list-style-type: none"> <li>Select the checkbox to the left of the lienholder name.</li> <li>Click the <b>Remove</b> button.</li> </ul>	<table border="1"> <thead> <tr> <th>Vehicle #</th> <th>Vehicle Type</th> <th>Model Year</th> <th>Make</th> <th>Model</th> <th>VIN</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Private Passenger</td> <td>2008</td> <td>FORD</td> <td>MUSTANG GT</td> <td>1ZVHT82H48511345</td> </tr> </tbody> </table> <table border="1"> <thead> <tr> <th>Name</th> <th>Type*</th> <th>Expiration Date</th> <th>Certificate Required</th> <th>Loan Number</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td>Fifth Third</td> <td>Lienholder</td> <td>10/25/2025</td> <td>Yes <input type="radio"/> No <input type="radio"/></td> <td>1234562.JH</td> </tr> </tbody> </table>	Vehicle #	Vehicle Type	Model Year	Make	Model	VIN	1	Private Passenger	2008	FORD	MUSTANG GT	1ZVHT82H48511345	Name	Type*	Expiration Date	Certificate Required	Loan Number	<input checked="" type="checkbox"/>	Fifth Third	Lienholder	10/25/2025	Yes <input type="radio"/> No <input type="radio"/>	1234562.JH
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### Step 2

Action	Screen										
<p>After confirming the lienholder has been removed, you may:</p> <ul style="list-style-type: none"> <li>Quote and issue the policy change.</li> </ul>	<table border="1"> <thead> <tr> <th>Name</th> <th>Type</th> <th>Expiration Date</th> <th>Certificate Required</th> <th>Loan Number</th> </tr> </thead> <tbody> <tr> <td colspan="5">No data to display</td> </tr> </tbody> </table>	Name	Type	Expiration Date	Certificate Required	Loan Number	No data to display				
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