

NAMED INSUREDS & ADDITIONAL INTERESTS

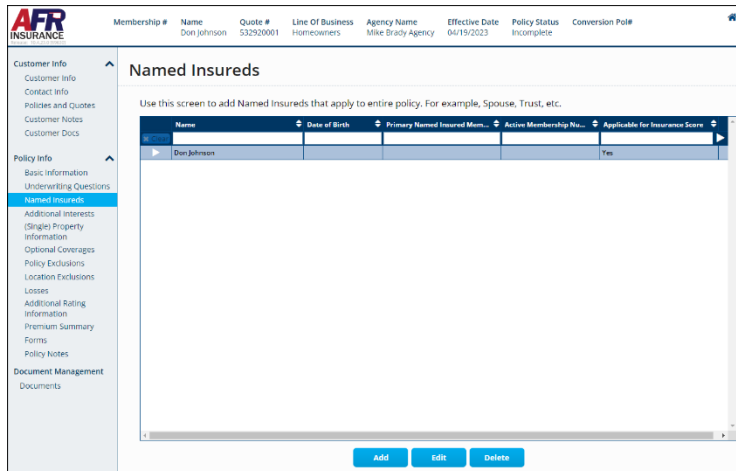
PolicyPro by Sapiens



NAMED INSURED OR ADDITIONAL INTEREST

The **Named Insured** is the Primary Named Insured named on the policy. An **Additional Named Insured** is someone who is also jointly covered by an insurance policy, such as a Spouse, Child, Household Member, or possibly a Trust.


An **Additional Interest** is typically an entity that has a financial interest in the insured property, such as a Mortgagee, Lienholder, Contract of Sale, or even an Additional Insured.

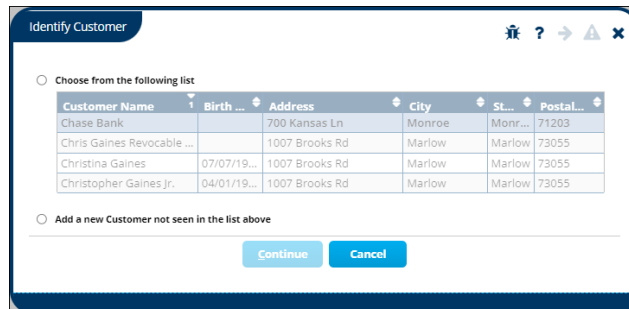


From the **Named Insured** screen or the **Additional Interest** screen, you can **ADD**, **EDIT**, and **DELETE** any named insureds or additional interests in addition to the Primary Named insured.

It is important to **ADD ALL** Named Insureds **BEFORE** running the **CLUE** report.

ADD

 To add a Named Insured or Additional Interest to a policy, first click **ADD**, then select from the list of previously entered Named Insureds, or add a new customer not seen in the list provided.



A new Named Insured or Additional Interest should either be entered as an **Individual** or a **Legal Entity**.

REMEMBER: It is recommended to create a **NEW** customer, pertaining to Additional Interests (Mortgagee, Lienholder, etc.), each time you **ADD** to ensure your policy will not be affected if edited by another user.

NAMED INSURED & ADDITIONAL INTERESTS

PolicyPro by Sapiens



NAMED INSURED

When adding a Named Insured, you must complete all the required fields marked by a ***Red Asterisk**, which include:

- First Name
- Last Name
- Address
- City
- State
- Postal Code

Select **Same as Policy Address** to prefill the address, or manually enter another address.

After you click **Continue**, another screen will open with more required fields, which include:

- Birth Date
- Marital Status
- Social Security Number.

The **Insured Type & Relationship to Primary Named Insured** fields are not required, but we highly encourage them to be completed while the information is fresh on your mind.

ADDITIONAL INTEREST

Click **ADD** to add an **Additional Interest**, which will typically be added as a **Legal Entity**. Legal Entity fields include:

- Name
- Address
- City
- State
- Postal Code

NAMED INSURED & ADDITIONAL INTERESTS

PolicyPro by Sapiens



After you click **Continue**, another screen will open with more required fields, which include:

- Is this an Additional Insured?
- Is this a Mortgagee?

Click **Submit and Return** to save.

Adding an **Additional Interest** isn't complete until you add them to the **Property Additional Interest Schedule** screen. Make your selections from the drop-down boxes and complete the following fields:

- Additional Interest Name
- Additional Interest Type
- Mortgagee Type
- Loan Number
- Description

If the policy is **Billed to the Mortgagee**, you also need to verify that the billing is also updated with the correct Mortgagee information.

EDIT

To edit a Named Insured or Additional Interest, click on the name you'd like to edit, click the **EDIT** button, make the necessary changes, then click the **SUBMIT** button to save your changes.

While creating a **Quote**, this is a great time to edit the **Primary Named Insureds** information and fill out the required fields: **Date of Birth**, **Marital Status**, and **Social Security Number**.

CAUTION: Be very cautious when editing a Named Insured or Additional Interest, and make sure you are only making changes to the policy you are working on. Otherwise, you may unintentionally change every policy the Named Insured or Additional Interest is connected to.

NAMED INSUREDS & ADDITIONAL INTERESTS

PolicyPro by Sapiens



DELETE

If you need to remove a Named Insured or Additional Interest from a policy, click the **DELETE** button and confirm the removal by clicking **OK**.

Delete

Named Insureds

Use this screen to add Named Insureds that apply to entire policy. For example, Spouse, Trust, etc.

Name	Date of Birth	Primary Named Insured Mem...	Active Membership Nu...	Applicable for Insurance Score
▶ Dan Johnson	04/01/1985			Yes
▶ Diane Johnson	04/01/1987			Yes

Add **Edit** **Delete**

Confirm

Are you sure you want to delete the selected item(s)?

OK **Cancel**

When deleting an Additional Interest, it is also important to double check that they are also deleted from the Property Additional Interest Schedule.

Additional Interests

Please add any Additional Interest for the policy. This may consist of a Mortgagee, Lienholder, Contract of Sale, Loss Payee or Additional Insured.

Name	Address
▶ JP Morgan Chase	700 Kansas Ln, Monroe, LA 71203

Add **Edit** **Delete**

Property Additional Interest Schedule

This screen allows you to add the additional interest to the dwelling or location.

Additional Interest Name	Additional Interest Type	Mortgage Type	Loan Number
JP Morgan Chase	Mortgagee	1st Mortgage	123456789

Add Row **Delete Row** **Submit and Return** **Cancel**