

Mortgagee Changes

- 1) To access the Mortgagee Changes screen, click the new Policy Management icon.



- 2) Select the Mortgagee Changes link to open the Mortgagee Changes page.



3) Enter the policy number into the data field and click the Submit button. In order to proceed past this page, the policy number must be valid, the policy must be active, the Retail Agent number of the "viewing as" user must match the Retail Agent number listed on the policy, and there must be no pending changes on the policy.



If there are any problems, as listed above, the following type of error message will appear:



4) If there are no errors, RHQ will return with the Insured's information. If this information is correct, click the Continue button to move on to the next step. If the information is not correct click the Cancel button to return to the previous screen.

RHQ
Residential Homeowners Quoting
Coverage is a Click Away! SM

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Mortgage Changes

Welcome: Test Agent
TEST AGENCY
JEB999
J. E. Brown & Associates, Inc.

Viewing: Test Agent
TEST AGENCY
JEB999
J. E. Brown & Associates, Inc.

Please confirm that the information below is correct for the policy you wish to update. Click the Continue button to process mortgage changes for this policy, or click Cancel to return to the previous screen.

Policy Number:	QC40000123
Insured Name:	BARNEY BOWLS
Property Address:	910 S ATLANTIC BLVD ALHAMBRA, CA 91803-2213
Mailing Address:	910 S. ATLANTIC BLVD, ALHAMBRA, CA 91803

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5) Once the Insured's information is confirmed as correct, RHQ will display all of the Mortgagee data associated with that policy.

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Mortgagee Changes

Welcome: Test Agent
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JEB999
J. E. Brown & Associates, Inc.

Viewing: Test Agent
TEST AGENCY
JEB999
J. E. Brown & Associates, Inc.

Policy Details:

Policy Number: GC40000123
Insured Name: BARNEY BOWLS
Property Address: 918 S ATLANTIC BLVD ALHAMBRA, CA 91803-2213
Mailing Address: 918 S. ATLANTIC BLVD. ALHAMBRA, CA 91803

! You can add up to three mortgagees to a policy. Click the Edit button under the mortgagee you would like to edit, add or remove. Once you have edited a mortgagee record, you will be returned to this screen to review your changes before submitting your request.

Current Mortgagee Details:		
Bill to this Mortgagee? No MARTY'S MORTGAGE 123 FIRST AVENUE CLAREMONT, CA 91711 Loan # 12345679	Bill to this Mortgagee? No MIDWEST MORTGAGE 123 FIRST AVENUE OKLAHOMA CITY, OK 12345 Loan # 987654321	Add a Mortgagee
<input type="button" value="Edit"/>	<input type="button" value="Edit"/>	<input type="button" value="Edit"/>

To edit current Mortgagee information, click the "Edit" button associated with the proper Mortgagee.

If there are fewer than three Mortgagees, a blank box will appear. To add an additional Mortgagee, click the "Edit" button.

6) Clicking the "Edit" button under a current Mortgagee will direct the user to a page where that Mortgagee's information can be edited. Make any necessary changes in the data fields and click the "Submit" button.

Policy Details:

Policy Number:	GC40000123
Insured Name:	BARNEY BOWLS
Property Address:	918 S ATLANTIC BLVD ALHAMBRA, CA 91803-2213
Mailing Address:	918 S. ATLANTIC BLVD. ALHAMBRA, CA 91803

After making changes to this mortgagee, click the Submit button to return back to the confirmation screen where you can confirm your change request, or click Cancel to remove any changes.

Bill to this Mortgagee? No

Mortgagee Name: MARTY'S MORTGAGE

Second Name:

International Address?

Street: 123 FIRST AVENUE

City: CLAREMONT

State: California

Zip: 91711

Loan #: 12345679

Check here to remove this mortgagee: If this box is checked, this mortgagee record will be removed from the policy after submitting your changes on the next screen.

7) Clicking the "Edit" button under a blank Mortgagee record will direct the user to a page where they can enter all of the necessary information to create a new record. Simply fill in the data fields and click the "Submit" button.

Policy Details:

Policy Number:	GC40000123
Insured Name:	BARNEY BOWLS
Property Address:	918 S ATLANTIC BLVD ALHAMBRA, CA 91803-2213
Mailing Address:	918 S. ATLANTIC BLVD. ALHAMBRA, CA 91803

After making changes to this mortgagee, click the Submit button to return back to the confirmation screen where you can confirm your change request, or click Cancel to remove any changes.

Bill to this Mortgagee? Select

Mortgagee Name:

Second Name:

International Address?

Street:

City:

State: Select

Zip:

Loan #:

Check here to remove this mortgagee: If this box is checked, this mortgagee record will be removed from the policy after submitting your changes on the next screen.

8) Once the user has completed all of their edits, any changes to a Mortgagee record will be displayed on this screen. Edited records will be displayed under the original, and any fields that were updated will be shown in red.


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Viewing: Test Agent
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Policy Details:

Policy Number:	GC40000123
Insured Name:	BARNEY BOWLS
Property Address:	918 S ATLANTIC BLVD ALHAMBRA, CA 91803-2213
Mailing Address:	918 S. ATLANTIC BLVD, ALHAMBRA, CA 91803

 You can add up to three mortgagees to a policy. Click the Edit button under the mortgagee you would like to edit, add or remove. Once you have edited a mortgagee record, you will be returned to this screen to review your changes before submitting your request.

Current Mortgagee Details:		
Bill to this Mortgagee? No MARTY'S MORTGAGE 123 FIRST AVENUE CLAREMONT, CA 91711 Loan # 12345679	Bill to this Mortgagee? No MIDWEST MORTGAGE 123 FIRST AVENUE OKLAHOMA CITY, OK 12345 Loan # 987654321	Add a Mortgagee
<input type="button" value="Edit"/>	<input type="button" value="Edit"/>	<input type="button" value="Edit"/>

Pending Mortgagee Changes:		
Bill to this Mortgagee? Yes Three Diamond Financing 987 Main Street CLAREMONT, CA 91711 Loan # abc123def456	Bill to this Mortgagee? No MIDWEST MORTGAGE 123 FIRST AVENUE OKLAHOMA CITY, OK 12345 Loan # 987654321	



9) Underneath the Mortgagee data display is where the User can enter a requested effective date for the change. The effective date can be anywhere between the current date and the policy expiration date. This field will be automatically populated with the earliest possible date for the change. If a Renewal Offer has already been generated, the effective date will be defaulted to the Renewal term effective date.

Change Request Details:	
Requested Effective Date for this Change: <input type="text" value="07/28/2004"/> (any date between today's date and the policy expiration date)	Please note: If the Renewal Offer has already been generated, the effective date for this change will automatically default to the Renewal term effective date. If you require a change effective date not valid from this site, please contact the policy processing center.
Retail Agent Email Address: <input type="text" value="erica.rozett@stpaul.com"/>	
<input type="button" value="Submit"/> <input type="button" value="Cancel"/>	

Once all changed Mortgagee data is correct and an Effective Date has been selected, click the "Submit" button at the bottom of the screen to submit the change.

10) After the change is submitted, a page confirming that the changes were submitted will be displayed. In addition, a copy of the changes is emailed to the email address filled out on the previous screen.

Mortgagee Changes

Welcome: Test Agent
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 J. E. Brown & Associates, Inc.

Viewing: Test Agent
 TEST AGENCY
 JEB999
 J. E. Brown & Associates, Inc.

Change Requested by: Agent, Test on 07/26/04 3:20:38 PM
Changed on behalf of: Agent, Test on 07/26/04 3:20:38 PM

You have authorized USF&G Specialty to process mortgagee changes on this policy according to the effective date entered. Please print a copy of this page and keep it for your records.

Policy Details:	
Policy Number:	GC40000123
Insured Name:	BARNEY BOWLS
Property Address:	918 S ATLANTIC BLVD ALHAMBRA, CA 91803-2213
Mailing Address:	918 S. ATLANTIC BLVD. ALHAMBRA, CA 91803

Changed Mortgagee Details:		
Bill to this Mortgagee? Yes MARTY'S MORTGAGE 123 FIRST AVENUE CLAREMONT, CA 91711 Loan # 12345679	Bill to this Mortgagee? No MIDWEST MORTGAGE 123 FIRST AVENUE OKLAHOMA CITY, OK 12345 Loan # 987654321	

Change Request Details:	
Requested Effective Date for this Change:	07/26/2004
Confirmation Sent to:	erica.rozett@stpaul.com

Note: If any errors occur while submitting the change, an error message similar to the following will appear. In this case, click on the link to send an email to the proper policy processing center for more assistance.

The screenshot shows the RHO Residential Homeowners Quoting website interface. At the top left is the RHO logo and the text 'Residential Homeowners Quoting' with the tagline 'Coverage is a Click Away!'. A navigation bar at the top right contains links for 'Agency Services', 'New Quote', 'Quote List', and 'Policy Management', each with a corresponding icon. Below this is a secondary navigation bar with links for '? RHO Tips', 'Contact Us', and 'Logout'. The main content area is titled 'Mortgagee Changes'. On the right side of this area, there is a user greeting: 'Welcome: Test Agent' followed by 'TEST AGENCY' and 'JEB999', and 'J. E. Brown & Associates, Inc.'. Below that, it says 'Viewing: Test Agent', 'TEST AGENCY', 'JEB999', and 'J. E. Brown & Associates, Inc.'. A red error message states: 'The following errors occurred submitting your mortgagee changes: * You must select a "Bill to this Mortgagee" or contact the policy processing center for assistance.' Below the error message is a 'Policy Details' section with the following information: Policy Number: GC40000122, Insured Name: ADELLE ADAMS, Property Address: 1852 SCENIC DR. MODESTO, CA 95355-4956, and Mailing Address: 1852 SCENIC DR. MODESTO, CA 95355. At the bottom, a red warning icon is followed by the text: 'You can add up to three mortgagees to a policy. Click the Edit button under the mortgagee you would like to edit, add or remove. Once you have edited a mortgagee record, you will be returned to this screen to review your changes before submitting your request.'