



Adding or Updating a Payor to the Insured or a Third Party

What How to add or update the payor for a personal lines policy in PolicyCenter®.

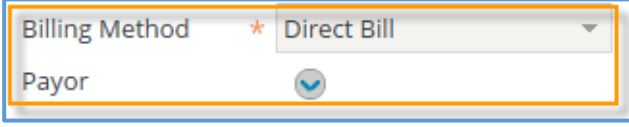
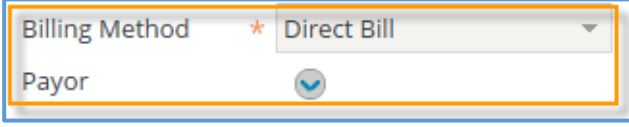
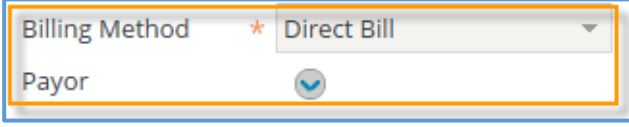
Who Agents

When Any time the payor needs to be updated to the insured or a third party in a submission or policy change.

Additional Resources Refer to this job aid, [Adding or Changing a Premium Finance Company](#) for information specific to premium finance companies.

For more information on how to initiate and complete submissions and policy changes, refer to the [Policy Change](#) and [New Business Submission Guide](#) job aids, which are on the [Citizens Agent Training](#) pages of our website.

Procedure Follow these steps to add or update a payor to the insured or a third party:

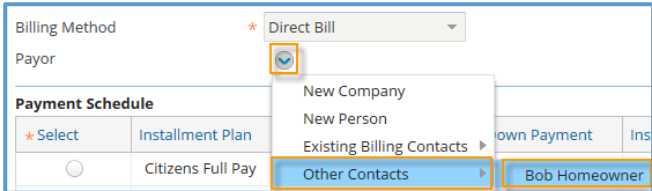
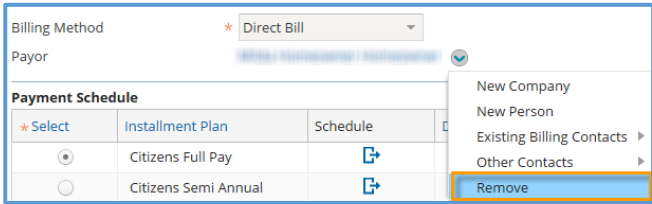
Step	Action				
1	Access the <i>Payment</i> screen of the submission or policy change.				
2	<table border="1"> <thead> <tr> <th>If you want to ...</th> <th>Then ...</th> </tr> </thead> <tbody> <tr> <td>Update the payor to the insured</td> <td> <p>A. When the <i>Billing Method</i> is <i>Direct Bill</i>, the payor defaults automatically to the first named insured. No other action is needed, except to click Request Approval.</p>  </td> </tr> </tbody> </table>	If you want to ...	Then ...	Update the payor to the insured	<p>A. When the <i>Billing Method</i> is <i>Direct Bill</i>, the payor defaults automatically to the first named insured. No other action is needed, except to click Request Approval.</p> 
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Adding or Updating a Payor to the Insured or a Third Party, Continued

Procedure,
continued

Step	Action	
	If you want to ...	Then ...
	Update the payor to a third party	<p>A. In the <i>Payor</i> drop-down menu, select Existing Billing Contacts or Other Contacts.</p> <p>B. Create a new person or new company to be the payor.</p> <p><i>Note:</i> To add a third party as the payor to the policy, the contact can be:</p> <ul style="list-style-type: none"> • An additional interest displayed on the <i>Policy Info</i> or <i>Dwelling</i> screens • Added as a new person or new company  <p>Result: The <i>Payment</i> screen displays the contact in the <i>Payor</i> field.</p>
	Remove a third party as the payor	<p>In the <i>Payor</i> drop-down menu, select Remove.</p> 
3	Click Request Approval .	

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