

ADDITIONAL/OTHER INTERESTS/CERTIFICATE HOLDER DATABASE

The Additional/Other Interests/Certificate Holder Database is a centralized database of common Loss Payees, Mortgagees, Additional Interests, and Certificate Holders that enables users to easily select a database item when inserting or editing policies.

Required Permissions

In order to complete this task, user permissions must be set to include:


▼Setup:

- Additional/Other Interest/Certificate Holder Database

See [Setting User Permissions](#) for more information.

Setting up the Additional Interest database

Add Additional Interests and their contact information to the database on this dialog. Users can easily search the database when adding an Additional Interest to the policy.

1. Click the  **Settings** icon, and then select **Additional/Other Interest/Certificate Holders Database** from the main CMS menu bar.
The **Additional/Other Interests - Setup** dialog opens.
2. Click **New** to add an Additional Interest to the database.
The **Add/Edit Additional Interest List** dialog opens.

Modifying the Additional Interest list

Type – Select the type(s) of additional interest. The type can be used as a filter when searching for Additional Interests.

- Loss Payee
- Mortgagee
- Additional Interest
- Certificate Holder

Name and Address Information – for the Additional Interest.



TIP: Complete the Zip field to auto-fill the City, State, and County fields.

Contact Information – for the Additional Interest.

Double-click on **Email**, **Fax**, or **Phone** to open the **Edit Contact Information** dialog for the selected Contact Type.

Complete the contact information as needed, and then click **OK**.


Notes – Include additional information for the Additional Interest in the **Notes** field, as needed.

Click **OK** to save the new entry to the database.

3. Click **Close** when Additional Interest setup is complete.

The new entry is now available from the **Additional/Other Interests** database when adding a **certificate** or an Additional Interest to a policy.

Modifying an entry in the database

1. Click the  **Settings** icon, and then select **Additional/Other Interest/Certificate Holders Database** from the main CMS menu bar.

The **Additional/Other Interests - Setup** dialog opens.

2. Select the Additional Interest to be modified from the list, and then click **Edit**.

- Enter the name of the Additional Interest in the **Filter** field to speed up your search.

OR


- Scroll through the list to find the Additional Interest you want to modify.

The **Add/Edit Additional Interest List** dialog opens with the contact information for the selected Additional Interest.

3. Modify as needed, and then click **OK**.

4. Click **Close** when changes are complete.

Deleting an entry from the database

1. Click the  **Settings** icon, and then select **Additional/Other Interest/Certificate Holders Database** from the main CMS menu bar.

The **Additional/Other Interests - Setup** dialog box opens.

2. Select the Additional Interest to be removed from the list, and then click **Delete**.
 - Enter the name of the Additional Interest in the **Filter** field to speed up your search.

OR

 - Scroll through the list to find the Additional Interest.

The Additional Interest is removed from the database.

Printing the database

1. Select the Additional Interest type from the **Filter** from the drop-down list.
 - All
 - Loss Payee
 - Mortgagee
 - Additional Interest
 - Certificate Holder
2. Click **Print** to print the database for the selected Additional Interest type.

Accessing the database

The Additional/Other Interests/Certificate Holder Database can be accessed from the **AI Lookup** button when adding Additional Interests to a policy or certificate.

Please see [Additional Interests for Auto, Boat, and Home Policies](#) and [Additional Interest on a Commercial Policy](#) for more information on using the database to apply an Additional Interest.

Related Topics

[Additional Interest on a Commercial Policy](#)

[Additional Interests for Auto, Boat, and Home Policies](#)

[Certificate of Liability and Certificate Holders](#)

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