



Policy Contacts in Slate: How to Add a Mortgagee

The policy Participants feature has been revamped to **Contacts** with a cleaner, more intuitive layout. The new design makes it easier to view, manage, and update contact information.

A **Contact** is anyone associated with the policy, including Insured, Lender, Additional Insured, Agent, Sales Representative or Underwriter.

A screenshot of the 'Contacts' page in the Slate system. The page has a header with 'Contacts - [Policy ID]' and a 'Policy Term' dropdown showing 'BFL672580-00 - Active'. The main content area is divided into three sections: 'Insureds', 'Mortgagees', and 'Other Contacts'. The 'Insureds' section shows a 'Primary Insured (1)' with fields for Address, Phone, and Effective Start Date. The 'Mortgagees' section shows a 'Mortgagee' for 'BANK OF AMERICA, N.A. ISAAA/ATMA' with fields for Address and Loan Number. The 'Other Contacts' section shows 'Agency' and 'Sales Representative' options. Each section has a 'Manage' link.

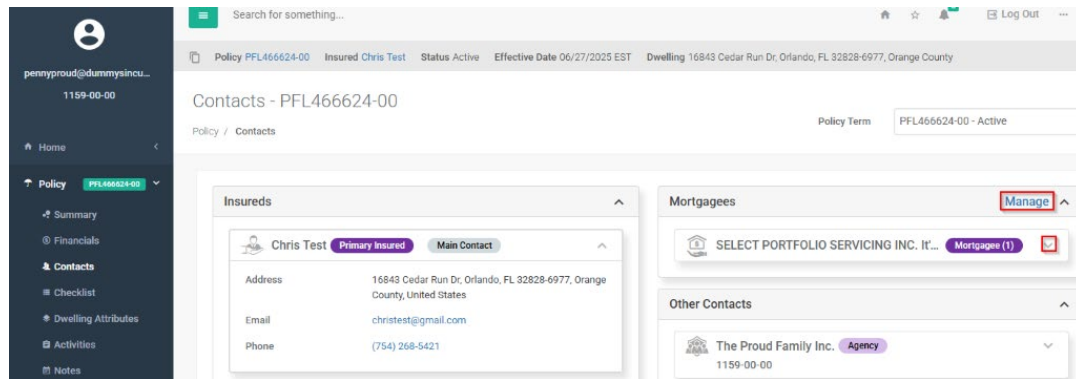
Note: To remove a Mortgagee from a policy, upload a Loan Satisfaction letter under the Files tab for Underwriting to process.


To add a Mortgagee, follow these steps:

1. Once you have located the policy, expand the menu options on the left navigation bar and click **Contacts**.

A screenshot of the 'Contacts' page in the Slate system. The left navigation bar is expanded, showing options like Summary, Financials, Contacts, Checklist, Dwelling Attributes, Activities, Notes, Files, Underwriting, Associated Policies, and History. The 'Contacts' option is highlighted. The main content area shows a 'Summary - PFL-00' and a 'Contact Information' form with fields for Dwelling Address, Mailing Address, Phone Type, Phone Number, and Email Address. A 'Send Password Reset' button is also visible.

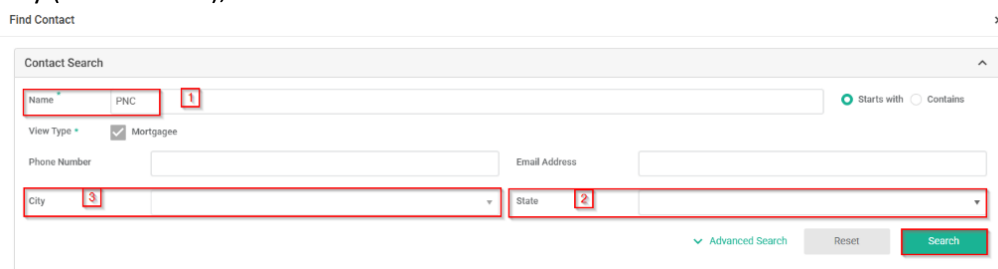
- On the Policy Contact screen, click **Manage** located on the top right of the Mortgagee grid to add a new Contact.



- Click the + icon  located on the top left of the mortgage grid. The Mortgagee contact most likely already exists in the system – to avoid having to type the address, click **Search** on the Add New Mortgage popup.



- To narrow down your search, enter in the Name of the Lender, as well as the State and City (in that order), and click the **Search** button.



- A list of existing Mortgagees with that information will populate. Select the appropriate lender on the list by clicking the blank space within the row—not the bank name hyperlink. Once clicked, their information display to the right under **Selected Contact(s)**. Click **Select**.

Find Contact

Contact Search

Filtered By: PNC Refine Search 1

Name	Phone Nun	Email Addr	Address	City	State	Zip Code
PNC BANK, NATIOANAL ASSOCIATION ISAOA/ATIMA			PO BOX 1024	Dayton	Ohio	45401-1024
PNC BANK, NATIOANAL ASSOCIATION ISAOA/ATIMA			PO BOX 1024	Dayton	Ohio	45401-1024
PNC BANK			2730 LIBERTY	Pittsburgh	Pennsylvania	15222
PNC BANK NAT'L ASSOCIATION			P O BOX 1024	Dayton	Ohio	45401-1024
PNC BANK, NATIOANAL ASSOCIATION ISAOA/ATIMA			PO Box 1024	Dayton	Ohio	45401-1024
PNC NA ISAOA/ATIMA			PO Box 1024	Dayton	Ohio	45401-1024
PNC BANK ISAOA			P.O. BOX 70	Dallas	Texas	75370
PNC MORTGAGE, NATIONAL ASSOCIATION			P.O. BOX 1024	Dayton	Ohio	45401-7729
PNC BANK ISAOA			P.O. BOX 18	Dayton	Ohio	45401-1024
PNC BANK			2730 LIBERTY	Pittsburgh	Pennsylvania	15222-4704

Selected Contact(s)

PNC BANK , NATIOANAL ASSOCIATION ISAOA/ATIMA
PO Box 1024, Dayton, OH 45401-1024, Montgomery County, United States

2 Select Cancel


6. To finish, type the Loan Number, and finally "Submit."

Add New Mortgagee


Contact PNC BANK , NATIOANAL ASSOCIATION ISAOA/ATIMA


Loan Number 2514568 1

2 Submit Cancel

7. If you are adding a new lender to the policy whose information does not already exist in the system, click the  arrow on the Add New Mortgagee popup, then **Add New Contact**.

Add New Mortgagee

Contact  1

Loan Number  1

2 Add New Contact

Submit Cancel

8. Complete the form to add a new Contact. All fields marked with an asterisk are required. When done, click **Submit**.

New [X]

View Type ^{*} Mortgagee

Contact Type ^{*} Company

Name ^{*} 1 [Text Field]

ISAOA ☐ (It's Successors and or Assigns)

ATIMA ☐ (As their Interest May Appear)

Care Of [Text Field]

Type ^{*} 2 [Text Field]

Address ^{*} 3 + Add Address

Phone + Add Phone

Email + Add Email

Website + Add Website

Tax ID [Tax Type...]

4 Submit Cancel

9. To finish adding the Contact, insert the Loan Number, select **Submit** and then **Save**.

10. If there is more than one lender listed, you can change the “Position” to identify which lender is the primary mortgagee and update the “Status” if needed. The primary mortgagee will display number (1) to the right of their name under the mortgagee grid.

Mortgagees [X]

Name	Address	Position	Loan Number	Status
BANK OF AMERICA	POBOX 25118, Tampa, FL 33622, Hillsborough	1	854215	Active
PNC BANK, NATIONAL ASSOCIATION ISAOA/ATIMA	PO Box 1024, Dayton, OH 45401-1024, Montgomery	2	854215	Active

Save Cancel

If you are unable to process the change or need additional assistance, please create an Activity for Underwriting using the **Underwriting Review Request – Mortgagee Change Request** template.