

## **Caller Verification**

Caller Verification  Caller	Identification	Accessible Information
Named Insured Spouse of Named Insured (Spouse must be on the policy) Driver listed on Policy	<ol> <li>Name</li> <li>Policy/Account Number</li> <li>Verify one of the following:         <ul> <li>Date of Birth (DOB)</li> <li>Mailing/Property</li> <li>Address</li> <li>Last 4 Digits of SSN</li> </ul> </li> </ol>	All policy information
Agent	<ol> <li>Name</li> <li>Agency name</li> <li>Agency code         <ul> <li>Confirm the name on the policy that the caller is inquiring about</li> </ul> </li> </ol>	All policy information
Additional Interest	<ol> <li>Name of Caller</li> <li>Name of Lender</li> <li>Policy Number</li> <li>Property address &amp; Owners name         OR</li> <li>Make/Model &amp; last 4 VIN</li> </ol>	<ul> <li>Coverage limits and deductibles, billing/policy status.</li> <li>No changes allowed.</li> </ul>
Attorney	<ol> <li>Name</li> <li>Firm's Name</li> <li>Insured's name</li> <li>Policy number</li> </ol>	<ul> <li>If on a claim, Transfer to Consumer Solutions.</li> <li>Do not disclose any data.</li> <li>No changes allowed.</li> </ul>
Dealership	Must receive confirmation from insured	<ul><li>Limits of coverage.</li><li>No changes allowed.</li></ul>
DMV or Department of Insurance (Department of Motor Vehicles)	<ol> <li>Name</li> <li>Insured's name</li> <li>Policy number</li> <li>Vehicle year, make model and VIN</li> <li>Time period or date information is requested on</li> </ol>	<ul> <li>Policy status and Agent of Record contact info.</li> <li>No changes allowed.</li> </ul>
Lien holder/Mortgagee	<ol> <li>Name of Caller</li> <li>Name of Lender</li> <li>Policy Number</li> <li>Property address &amp; Owners name         OR     </li> <li>Make/Model &amp; last 4 VIN</li> </ol>	<ul> <li>Physical damage deductibles, billing/policy status.</li> <li>Change lender &amp; or loan #.</li> </ul>
Insurance Carrier Confirming Prior Coverage	Must receive confirmation from insured	<ul><li>Transfer to Consumer Solutions.</li><li>No changes allowed.</li></ul>
Police Officer	Badge #     Insured's name and policy number, DL# or DOB	<ul> <li>Policy status and Agent of Record contact info.</li> <li>No changes allowed.</li> </ul>
Rental Car Company	Must receive confirmation from insured	<ul><li>Can confirm if insured has coverage or not.</li><li>No changes allowed.</li></ul>

