Shared Client Details Instructions

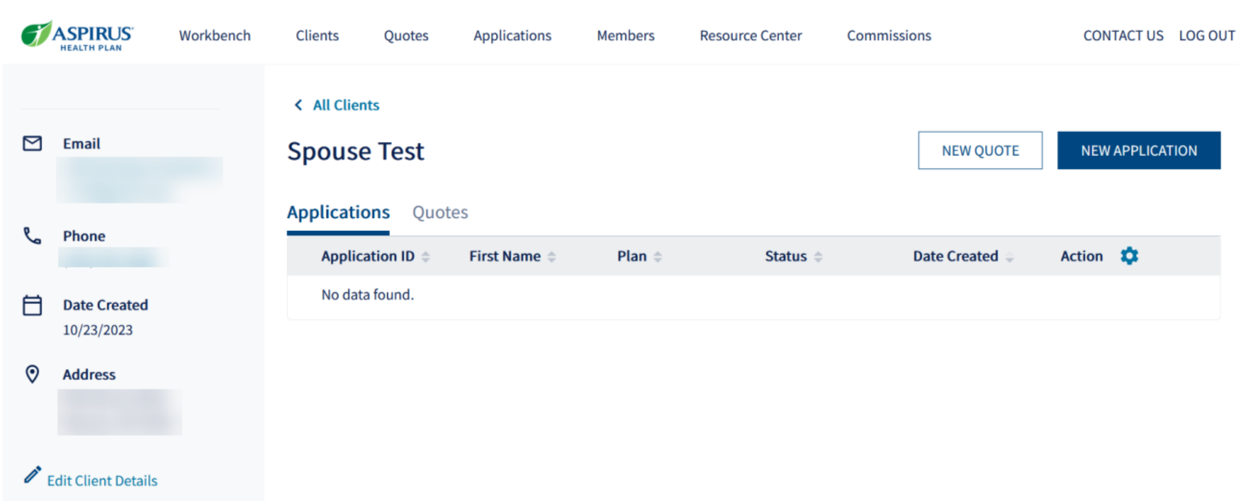
We have identified an issue when trying to submit an application on the broker portal for 2 people who share an email address and/or phone number (e.g., husband and wife). The page will say “there was an error processing your request” and below that it will also say “email field must be unique” and/or “phone number field must be unique.”

We have created a work around for this scenario, but please be aware that **this will only work if the two applicants live in the same zip code and county.**

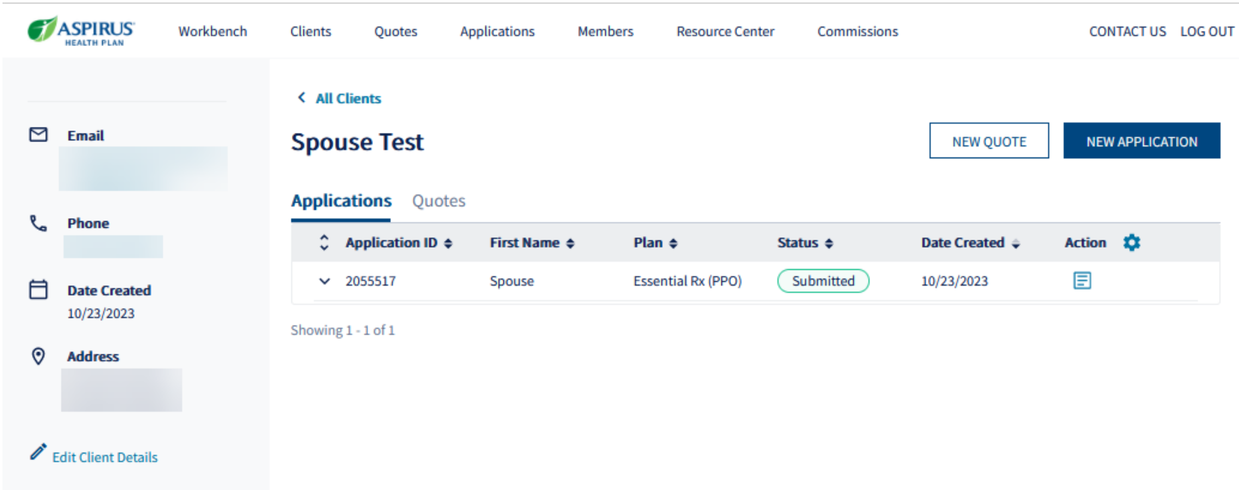
1. Under the “clients” tab in the broker portal you will need to create a client profile under one person (e.g., the wife).
2. Start an application from that profile and complete it as usual.
3. After submitting the first application, start another application from the same profile.
    a. Once you are in the application, you can change the information in the boxes to match the second applicant’s (e.g., the husband’s).
        i. **The only information that cannot be changed is zip code and county.**

Please see below for the same process, but with screenshots:

Under the “clients” tab in the broker portal, create a client profile for one of the applicants.

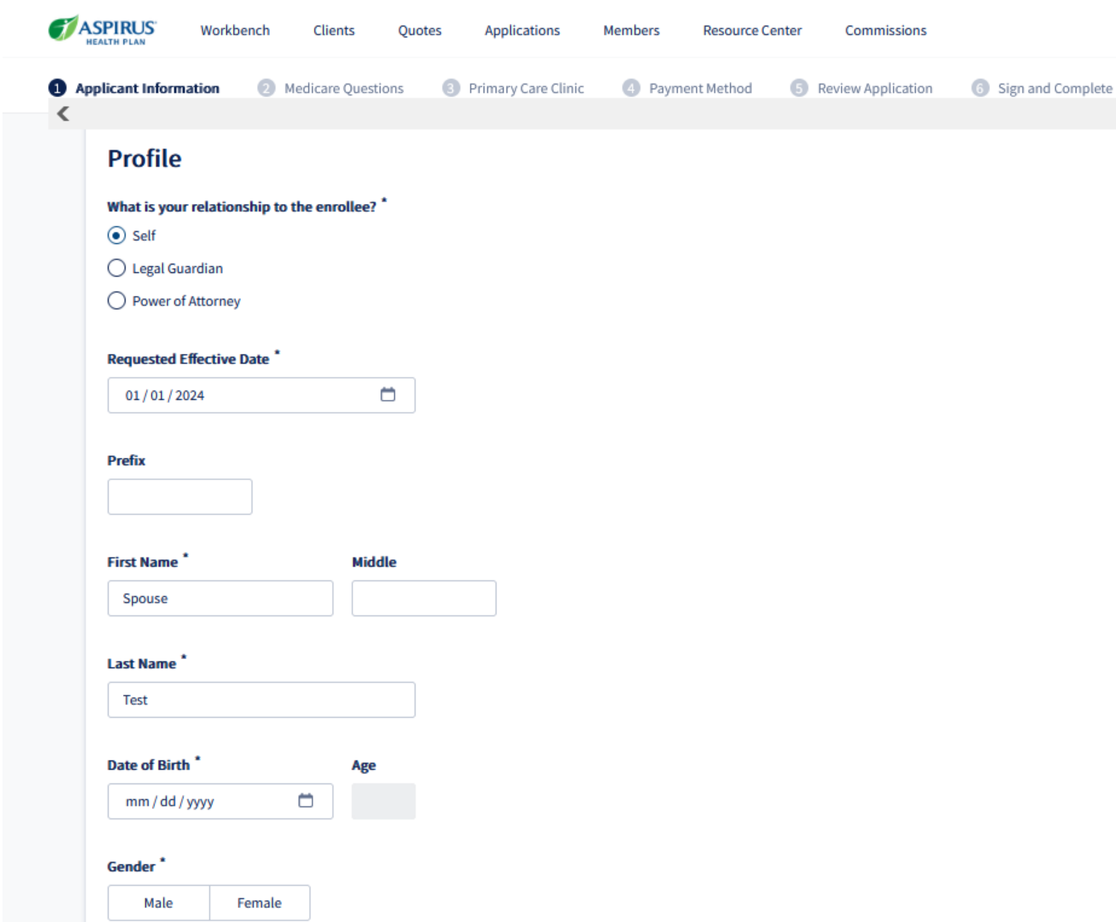


Under client profile, select “new application”, then start and submit the application for the applicant the client profile was created under.

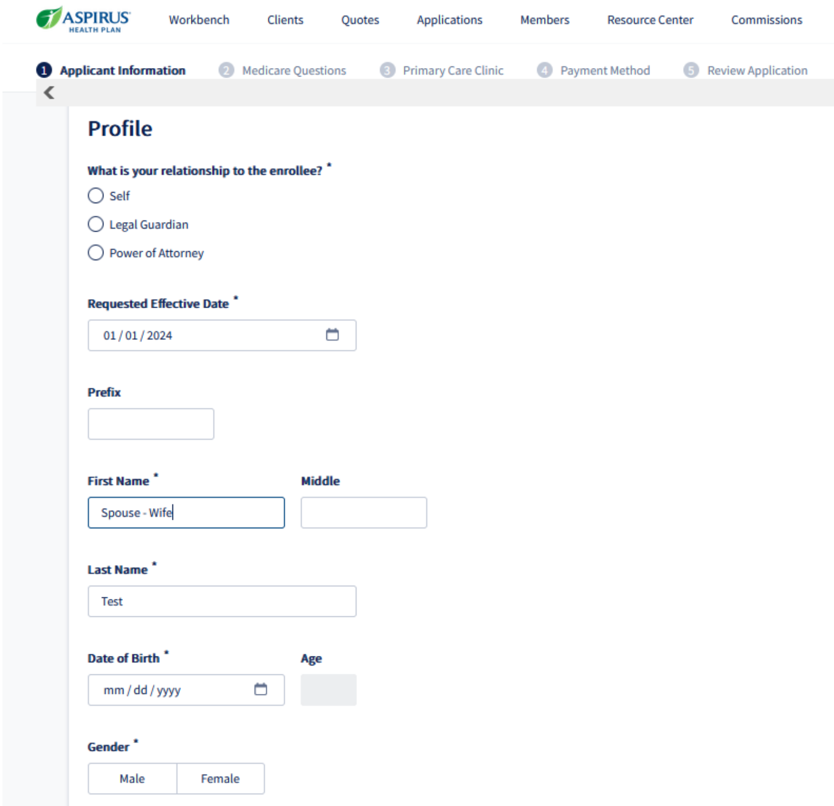


Then under the same client profile, select “new application” again, then during the application you can change all the details (except zip code and county).

Application one under the client with client details prepopulated:



Application 2 under the client where we edited the prepopulated values to the 2nd applicant's information:



How the applications will display under the client profile: