

UPDATE CONTACT INFORMATION - PS

AUTHORIZATION TO FILE (ATF) PAGE

After logging into ISIS, access the Authorization to File page by clicking the ATF link on the top menu bar.

Select Client or Company from drop down list.

Click the Update Contact Information link to the right of the Client list.

ATF – ADDRESS LINKS

An ATF – Address Change screen will appear with the Company Name in the center and 3 Address links just below it.

- Update Bill-to Address – indicates where invoices will be sent
- Update Ship-to Address – depends on the billing scenario
- Update Sold-to Address – reflects the contact filing the ATF

Billing Scenarios

1. For Client Only IDs, the Bill-to, Ship-to and Sold-to address information will be identical.
2. For Agent IDs where the Agents pays on the invoice, the Agent contact information will appear in the Bill-to and Sold-to address links. The Ship-to link will contain the Client contact information.
3. For Agent IDs where the Client pays on the invoice, the Agent contact information will appear in the Ship-to and Sold-to address information. The Client contact information will be available in the Bill-to link.

The Back button on the bottom of the page will lead you back to the Authorization to File page.

ATF – ADDRESS CHANGE

To view or update one of the addresses, click on the appropriate address link.

The subsequent page will contain the Client Name, Contact Name, and Agent Name (for Third Party Agent accounts) as headers on the upper left of the page.

Another header in the center of the screen indicates which Address link you're currently viewing.

The following fields are available to update for all 3 Address links:

Company Name
Address 1
Address 2
City, State, Zip
Country

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Phone, Ext (Company)
Contact (First Name, Last Name)
Phone, Ext (Contact)
Fax
E-Mail Address

Once you're done updating any records, press the Finish button. The next screen should display "CHANGE MADE SUCCESSFULLY" with a Back button below, leading you back to the Authorization to File page.

NOTE: If you encounter any problems while updating your customer information, please contact the ATF Administrator via email at avsisis@naic.org.

Please be aware that it will require 24 hours before your changes are visible on the ATF page. To ensure your information has been updated successfully, please take a moment to review them on the next business day. If the changes are not visible, and the ATF Administrator has not already contacted you, please do so by email at avsisis@naic.org.

If you are accessing an Address page for viewing purposes only, select the Back button to return to the previous ATF – Change Address screen with the Company Name and 3 Address links.