Process Changes for New-Business Submissions and Policy Change Requests

----

October 02, 2017

Citizens has implemented several changes to improve processing times and provide a better experience for agents and agency staff.

Updated Activity Name for Adding a New Mortgage Company

The *Request to Open a New List Bill Account BC* activity name has been changed to *Request to Create a New Mortgage Company*.

Agents should submit the activity via the *Actions* menu when a mortgage company is not listed in the *Search Results* section on the *Search Mortgage Company* screen and the policy is mortgagee-billed. For processing details, refer to the *Resources* section below.

Note: In some instances, agents may receive an alert message after selecting *Premium Estimate* that instructs them to complete the *Request to Open a New List Bill Account* activity. This message will be updated in the future to include the new activity name.

Handwritten Changes

Citizens no longer will review handwritten changes on documents uploaded after a new-business submission has been approved or for policy change requests that do not require review by Underwriting.

If an agent or their customer needs to make a change or add a note to an approved new-business application or policy change document, the agent:

- Must submit a policy change or create a *General Reminder* activity to submit a policy change once the policy is issued
    - Each change should be initialed by the policyholder.
    - If a change is not initialed by the policyholder, the agent must initial and date the document to confirm they have reviewed and acted on the request.

- Must contact Underwriting for direction when the change potentially affects the insurability of the risk
- Should, as a best practice, enter a note in PolicyCenter® when a policy change is initiated

---

Resources

Log in to the *Agents* site, and select **Training** → **Commercial** for the following job aids:

- *Commercial Lines: Adding or Updating a Mortgagee*
- *Commercial Lines: Selecting User-Generated Agent Activities*

For more information, agents can log in to the *Agents* site and from the website's top menu, select **Search** → **Search Frequently Asked Questions** (FAQs) and enter *add mortgagee* into the search field.

Agents also can access the FAQs via the *Knowledge Base* link at the top right corner of every screen in PolicyCenter.