New Auto-Issued Policy Changes and Activity Process

October 18, 2017

Citizens has made enhancements in PolicyCenter® to improve processing for policy changes and for notifying agents when additional underwriting information is required.

Auto-Issued Policy Changes

PolicyCenter now will approve and issue the following agent-created policy changes automatically when all required documents are submitted:

- Changing a policy mailing address
- Adding, changing or removing an additional interest, except removing a first mortgagee
- Adding, changing or removing flood information, including updating flood zone and/or flood insurer information
- Adding or removing Certified Acts of Terrorism coverage
- Adding or changing a premium finance company
- Removing locations, buildings, auxiliary and/or Special Class items
- Changing deductible and coinsurance, unless *Agreed Value* is selected for *Coinsurance*
- Adding, changing or removing an inspection contact, inspector and/or inspection company

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Notes

- Deductible and coinsurance change requests can be applied only at renewal and can be submitted up to 60 days prior to the renewal date.
- Underwriting approval is required for:
  - Changes not listed above or when changes not listed above are combined with auto-issued changes
  - Backdated policy changes
  - Removing a premium finance company
- As outlined in the October 2, 2017, Commercial Lines Bulletin, no handwritten notes should be made on uploaded documents. Any additional changes need to be entered through the policy change process.

For more details, refer to the resources below.

Updated Activity Process for Requesting Additional Information

The *Requesting Agent to Review and Provide Additional Information as Needed* activity has been renamed to *Underwriter Request for Additional Information*.

The agent of service will receive this activity on their *Desktop* when an Underwriter needs additional information and/or supporting documents. To view and complete the activity, an agent must:

1. Open the activity and review the *Description* section for details about the Underwriter's request.
2. Select **Link Document** to attach supporting documents and/or photos to the activity. If necessary, add a note to the *Text* box.
3. Select **Return to Underwriter** by the due date. The activity will be removed from the *Desktop*.

PolicyCenter automatically creates a policy note when:

- An Underwriter sends an *Underwriter Request for Additional Information* activity to the agent
- The agent returns the activity to the Underwriter

Resources

For more information, log in to the *Agents* site to access:

- The *Commercial* page of the *Training* section for the *Policy Change* module and *Completing a Underwriter Request for Additional Information Activity* job aid, which will be posted soon
- Select **Search** from the website's top menu, then **Search Frequently Asked Questions** (FAQs), and enter the following terms into the search field:
  - Policy change
  - Completing an activity

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