

# Autocompleted Activities

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February 19, 2018

Citizens continues to improve how PolicyCenter<sup>®</sup> manages agent activities. The improvement outlined below is effective immediately.

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## Autocompletion of Notification Activities

To reduce the number of activities that appear on an agent's *Desktop* in PolicyCenter, notification activities over 60 days old have been completed and removed automatically from the agent's *Desktop*. Moving forward, PolicyCenter will complete and remove notification activities automatically when they become 60 days old.

Notification activities do not require a response from agents. PolicyCenter sends them when:

- A policy or policy change is issued.
- A policy is canceled or nonrenewed.
- A cancellation or nonrenewal is rescinded.
- A policy is reinstated or rewritten.
- A pre-renewal direction of nonrenew is deleted.
- A scheduled nonrenew is edited.
- A policy has been renewed pending payment.

These new processes do not affect activities when an agent's response is necessary.

As a reminder, agents can:

- View a notification activity and select **Complete** to remove it from the *Desktop*
- Select **Closed in last 30 days** on the *My Activities* drop-down menu to view closed activities

*Note:* PolicyCenter limits viewing of closed activities to 500.

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## Resources

Log in to the **Agents** site, and select **Training** → **PolicyCenter** → **Servicing Policies** → **Commercial** to view the [Correspondence](#) module.

Agents can select **Search Frequently Asked Questions** from the website's top menu. Select **Search** → **Search Frequently Asked Questions** (FAQs), and enter **activities** in the search field for more information and training. Agents also can access the FAQs via the *Knowledge Base* link at the top right corner of every screen in PolicyCenter.

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