Autocompleted Activities and a New Inspection Activity

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Citizens continues to improve how PolicyCenter® manages agent activities and notifies agents of record when additional underwriting information is required. The improvements outlined below are effective immediately.

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- A cancellation or nonrenewal is rescinded.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.

New Activity: Inspection Results Response Required

The agent of record will receive an *Inspection Results Response Required* activity on their *Desktop* when an Underwriter needs additional information and/or supporting documents regarding an inspection.

To view and complete the activity:

1. Open the activity and select **View Reasons** for details of 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 agent's *Desktop*.

Resources

Log in to the **Agents** site, and select **Training** → **PolicyCenter** → **Servicing Policies** → **Personal** for the following job aids:

- Completing an Inspection Results Response Required Activity
- Agent Activities Overview
- Searching and Managing Activities for Your Office

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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