

# New Activity Process: Review and Provide Additional Information

February 27, 2017

Citizens has improved the PolicyCenter® process for notifying agents when additional underwriting information is required to determine if a property meets eligibility requirements for a new-business submission or existing policy. This new process will shorten underwriting processing times dramatically.

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## Review and Provide Additional Information Activity

The agent of record will receive a *Review and Provide Additional Information* activity on their *Desktop* when an Underwriter needs additional information and/or supporting documents. 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 your *Desktop*.

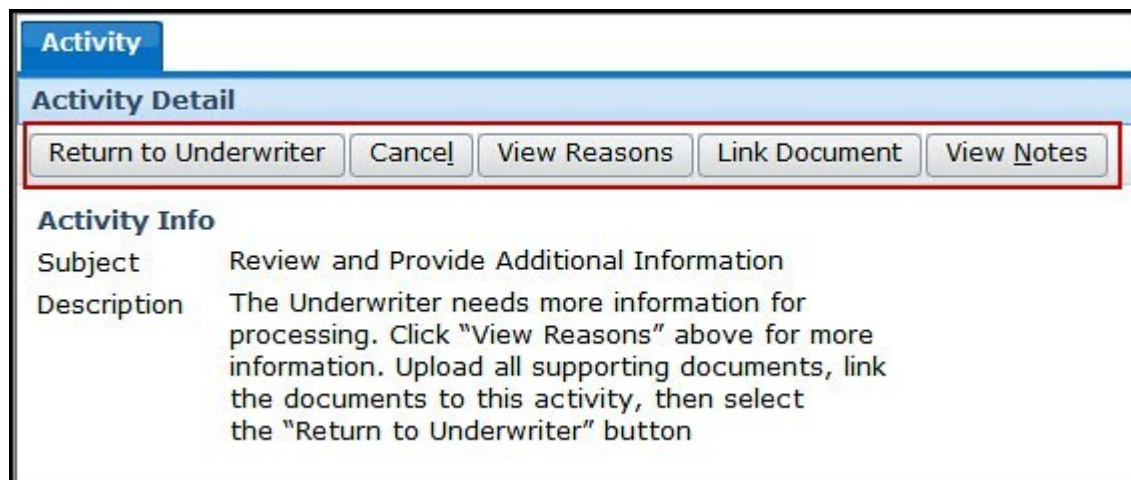


Figure 1: Review and Provide Additional Information Activity Detail screen

Select **View Notes** to display notes associated with the activity. PolicyCenter automatically creates a policy note when:

- An Underwriter sends a *Review and Provide Additional Information* activity to the agent.
  - The agent returns the activity to the Underwriter.
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# PolicyCenter Resources

For additional details:

- Log in to the *Agents* site and access the *Training* pages for the following PolicyCenter job aids:
  - *Agent Activities Overview*
  - *Completing the Review and Provide Additional Information Activity*
- Agents who already are logged in also can select **Search Frequently Asked Questions** from the website's top menu and enter *activities* in the search field to access activity information.
  - Agents also can access the FAQs via the *Knowledge Base* link at the top right corner of every screen in PolicyCenter.
- Agents and their staff can attend one of two free webinars on March 2 or 3, which will provide additional information about PolicyCenter enhancements and other important Citizens news:

## Citizens Webinars

Date

Times and Register Links

Thursday, March 2

2-3 p.m.

Friday, March 3

10-11 a.m.

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