

Billing and Payment Plan Enhancements

November 21, 2017

Citizens has made the following PolicyCenter[®] enhancements, which will assist agents in supporting their customers, improve processing time for new-business submissions and eliminate submitting some activities to Underwriting.

For new-business submissions in *Bound-Approved* status when payment has been posted, agents now can make the following changes on the *Payment* screen:

- Change the *Billing Method* from *Mortgagee Bill* to *Direct Bill*
- Change the *Installment Plan* when the policy is *Direct Bill*
- Change the answer for *Is this policy premium financed?*
 - If an agent selects *Yes*, the *Billing Method* automatically defaults to *Direct Bill* and they must select the *Payor* to identify the premium finance company (PFC)
- The *Payment Plan* field will default to full pay and cannot be changed if either of the following apply:
 - *The payor is a PFC*
 - The agent changes *Billing Method* from *Direct Bill* to *Mortgagee Bill*
- *If an agent tries to change the Billing Method to Mortgagee Billed and there is no mortgage company from the address book listed on the Additional Interest tab, PolicyCenter now will:*
 - Prompt the agent to select a mortgage company from the address book or initiate a *Request to Create a New Mortgage Company* activity
 - Automatically change the *Billing Method* to *Direct Bill*

Save Draft Reminder

During a policy change or for a new-business submission, when an agent uploads and submits the required documents and removes a PFC or changes the *Billing Method* from *Direct Bill* to *Mortgagee Bill*, they must select **Save Draft** on the *Payment* screen to apply the change.

Resources

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

- [Adding, Updating or Removing a Premium Finance Company as the Payor](#)
- [Adding, Updating or Removing the Mortgagee or Payor](#)

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

Share:

- [mailto:?subject=Billing and Payment Plan Enhancements&body=Check out this site I came across http://www.citizensfla.com/plb?p_p_id=com_liferay_journal_web_portlet_JournalPortlet&p_p_lifecycle=2&p_p_state=exclusive&p_p_resource_id=exportArticle&p_p_cacheability=cacheLevelPage&com_liferay_journal_web_portlet_JournalPortlet_groupId=20702&com_liferay_journal_web_portlet_JournalPortlet_articleId=5928950&com_liferay_journal_web_portlet_JournalPortlet_plid=30878&com_liferay_journal_web_portlet_JournalPortlet_portletResource=com_liferay_asset_publisher_web_portlet_AssetPublisherPortlet_INSTANCE_3YC3hsskaUbZ&com_liferay_journal_web_portlet_JournalPortlet_targetExtension=pdf](mailto:?subject=Billing%20and%20Payment%20Plan%20Enhancements&body=Check%20out%20this%20site%20I%20came%20across%20http://www.citizensfla.com/plb?p_p_id=com_liferay_journal_web_portlet_JournalPortlet&p_p_lifecycle=2&p_p_state=exclusive&p_p_resource_id=exportArticle&p_p_cacheability=cacheLevelPage&com_liferay_journal_web_portlet_JournalPortlet_groupId=20702&com_liferay_journal_web_portlet_JournalPortlet_articleId=5928950&com_liferay_journal_web_portlet_JournalPortlet_plid=30878&com_liferay_journal_web_portlet_JournalPortlet_portletResource=com_liferay_asset_publisher_web_portlet_AssetPublisherPortlet_INSTANCE_3YC3hsskaUbZ&com_liferay_journal_web_portlet_JournalPortlet_targetExtension=pdf)