

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.

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