

Performance Standards Program Updates

December 29, 2017

Citizens will make two updates to its Performance Standards program in 2018 for Personal Lines new-business submissions. This program measures the number of late submissions and binding violations incurred by an agent, because providing our Underwriters with complete and correct submissions enables them to make decisions about risks in a timely manner and helps Citizens provide the fastest service possible.

The updates include:

- After a brief hiatus, during which we made system enhancements, Citizens will reimplement the disciplinary action for late submissions bound on or after January 1, 2018.
- In addition to the four binding violation types listed in the [June 27, 2016, Personal Lines Bulletin](#), Citizens will expand the types later in 2018 to include:
 - Failure to upload a premium finance company contract (when applicable)
 - Incorrect application of credits
 - Failure to acquire policyholder signature(s) on the application

Notes

- The disciplinary thresholds for warning, suspension and termination will not change and are outlined in the *December 20, 2013, agent communication*.
- Violations cannot be:
 - Removed through corrective action taken after the violation occurs
 - Reassigned to a licensed customer representative
- Citizens will communicate more about the new binding violations later in 2018.

Appeal Process

Agents can appeal violations within:

- Five business days from the receipt of the *Late-Submission Violation Notice*
- Five calendar days from the receipt of the *Binding Violation - Issued* activity

Note: Currently, the binding violation activity on the *My Activities* screen indicates a window of five

business days, but the *Dispute* button displays for only five calendar days. This system defect will be corrected later in 2018; the *Dispute* button then will be visible for five business days.

Citizens' staff has developed many training pieces and frequently asked questions (FAQs) to help agents stay in compliance with new-business processes and to avoid disciplinary action. See below for more information.

Resources

Log in to the **Agents** site, and select **Training > PolicyCenter Servicing Policies** for the following:

- [Managing Late-Submission Violations](#) job aid for preventing and disputing a late-submission violations
- *Disputing a Binding Violation* job aid
- [New Business: Submission through Issuance](#) module
- [Uploading and Linking Documents](#) job aid
- [Creating an Effective Date Change Request](#) job aid

Use the *Personal Lines Required Document Guides*, which are on the *Personal* page of the *Training* section and the *PR-M* and *PR-W* pages of the *Personal* section.

From the website's top menu, select **Search > Search Frequently Asked Questions** (FAQs), and enter the following in the search field:

- *Late-submission*
- *Binding violation*
- *Withdrawn*
- *Bound Submission*
- *Change Date*

Note: Agents also can access the FAQs via the Knowledge Base link at the top-right corner of every screen in PolicyCenter.

See the April 17, 2017, [Personal Lines Bulletin](#).

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