



Policy Change

What Submitting a policy change in PolicyCenter®

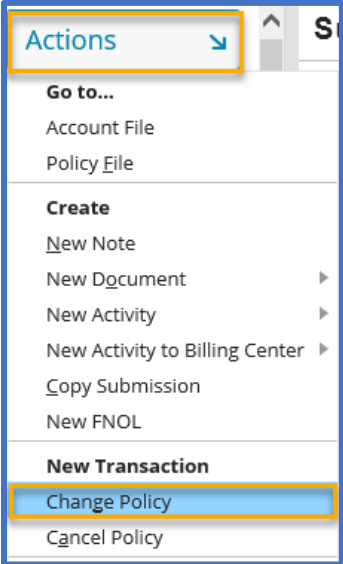
Who Agents and Citizens internal staff

When Policy changes can be initiated by both agents and Underwriters.

Note: Agent-initiated policy changes may require Underwriter review and approval or are auto-approved.

Procedure The procedure for processing a policy change is essentially the same for agents and Underwriters. A policy must issue before a policy change can be initiated.

To create a policy change, first access the policy, then:

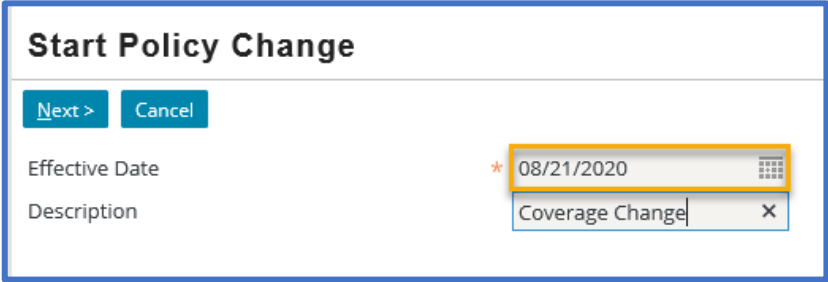
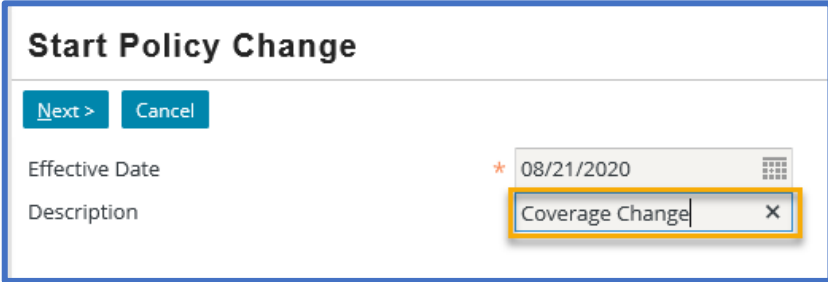
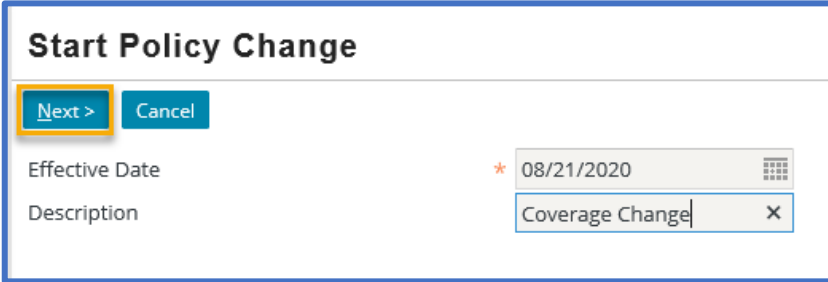
Step	Action
1	<p>Select Actions, then Change Policy:</p> <p>Result: The <i>Start Policy Change</i> screen appears.</p> 

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Policy Change, Continued

Procedure,
continued

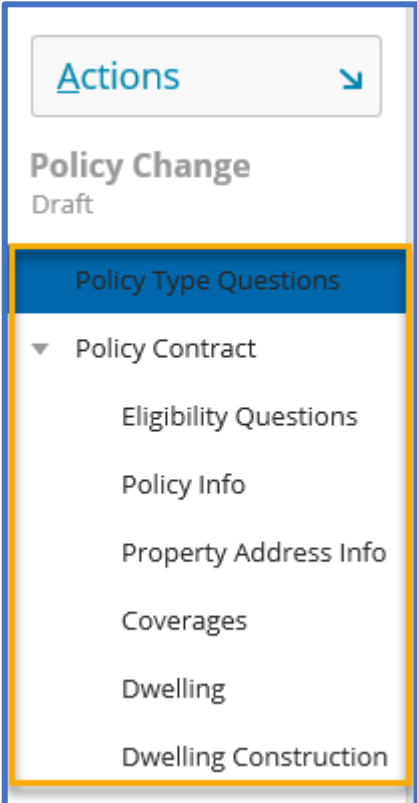
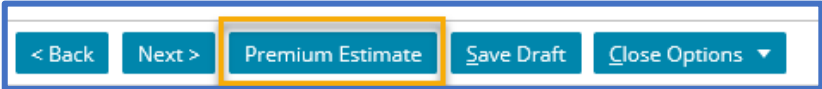
Step	Action
2	<p>Enter the effective date of the policy change, or select it from the calendar icon:</p>  <p>Note: Agents can select an effective date up to 30 days in the future. Agents can request a backdated policy change for certain circumstances. Refer to the <i>Backdating the Effective Date of a Policy</i> job aid for more information.</p>
3	<p>Enter a description for the change:</p> 
4	<p>Select Next:</p> 

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Policy Change, Continued

Procedure,
continued

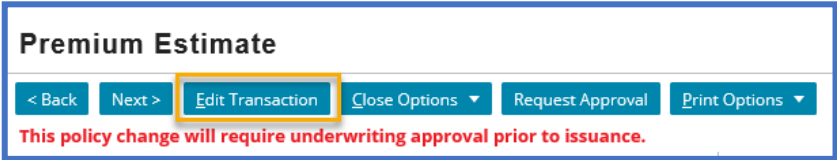
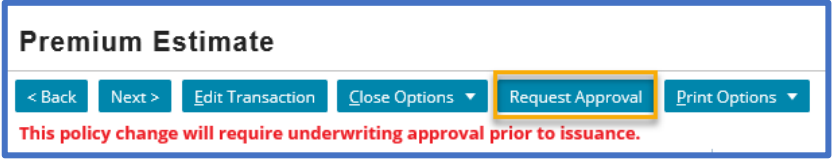
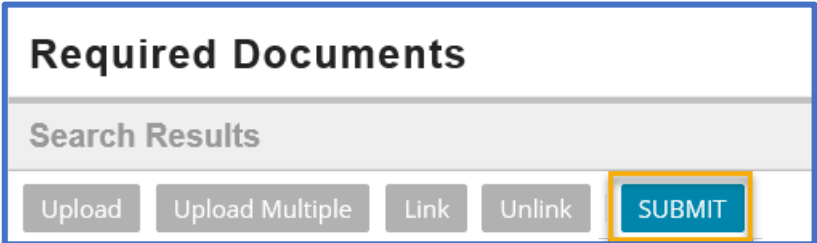

Step	Action
5	<p>Use the sidebar menu to navigate to the applicable page and make the change:</p> 
6	<p>When finished making the change, select Premium Estimate:</p>  <p>Result: The <i>Premium Estimate</i> screen appears. Review any changes in premium.</p>

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Policy Change, Continued

Procedure,
continued

Step	Action
6	<p>Select Edit Transaction if edits are needed to the policy change:</p>  <p>Select Request Approval to submit the change.</p>  <p>Result: The <i>Required Documents</i> screen appears.</p>
7	<p>Upload any required documents, then select Submit:</p>  <p>Result: The policy change status changes to <i>Policy Change (Pending UW Decision)</i>, or for auto-approved policy changes, the status changes to <i>Policy Change (Bound)</i>.</p>
8	<p>Navigate to the <i>Payment</i> screen to confirm change in premium.</p>  <p>Result: A Desktop activity appears once the policy change has issued.</p>

End Procedure