



## Policy Change

**What** Submitting a policy change in PolicyCenter®

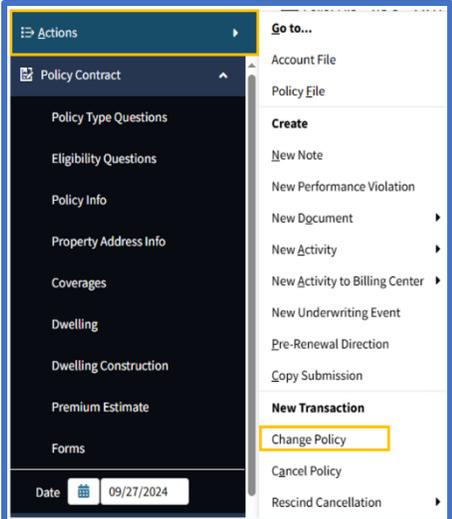
**Who** Agents and Citizens internal staff

**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 <b>Actions</b>, then <b>Change Policy</b>:</p> <p><b>Result:</b> The <i>Start Policy Change</i> screen appears.</p> 

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### Policy Change, Continued

Procedure,  
continued

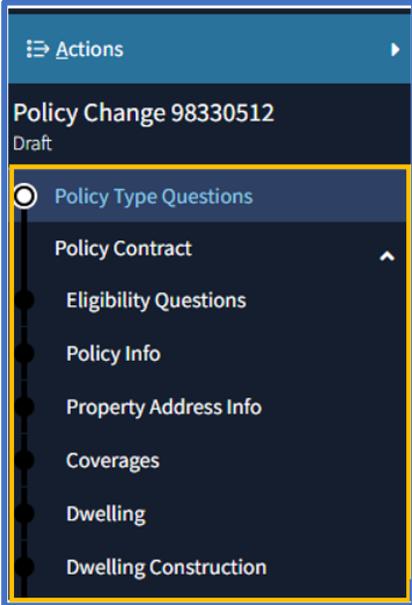
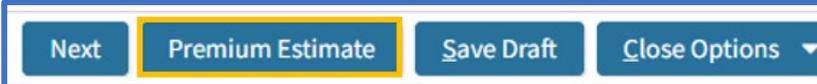
Step	Action
2	<p>Enter the effective date of the policy change, or select it from the calendar icon:</p> <div data-bbox="581 499 1398 705" style="border: 1px solid blue; padding: 5px;"> <p>Start Policy Change <span style="float: right;">Next &gt; Cancel</span></p> <p>Effective Date * 05/13/2025 </p> <p>Description <input type="text"/></p> </div> <p><i>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 <a href="#">Backdating the Effective Date of a Policy</a> job aid for more information.</i></p>
3	<p>Enter a description for the change:</p> <div data-bbox="581 884 1398 1110" style="border: 1px solid blue; padding: 5px;"> <p>Start Policy Change <span style="float: right;">Next &gt; Cancel</span></p> <p>Effective Date * 05/13/2025 </p> <p>Description <input style="border: 1px solid yellow;" type="text"/></p> </div>
4	<p><b>Select Next:</b></p> <div data-bbox="581 1157 1398 1362" style="border: 1px solid blue; padding: 5px;"> <p>Start Policy Change <span style="float: right;">Next &gt; Cancel</span></p> <p>Effective Date * 05/13/2025 </p> <p>Description <input type="text"/></p> </div>

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## Policy Change, Continued

Procedure,  
continued

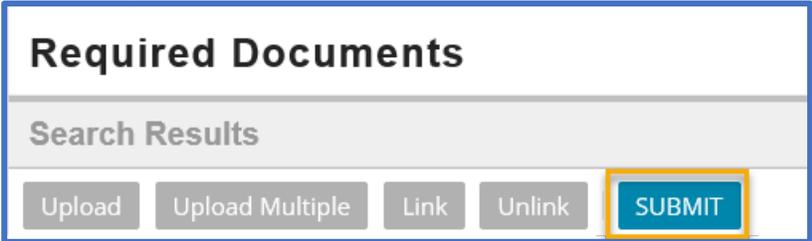
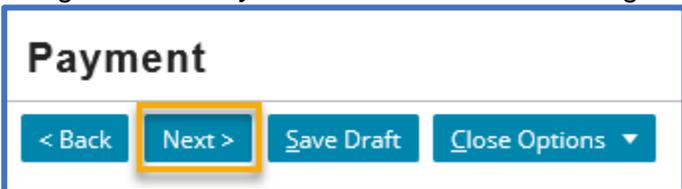
Step	Action
5	<p>Use the sidebar menu to navigate to the applicable page and make the change:</p> 
6	<p>When finished making the change, select <b>Premium Estimate</b>:</p>  <p><b>Result:</b> The <i>Premium Estimate</i> screen appears. Review any changes in premium.</p>

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### Policy Change, Continued

Procedure,  
continued

Step	Action
6	<p>Select <b>Edit Transaction</b> if edits are needed to the policy change:</p>  <p>Select <b>Request Approval</b> to submit the change.</p>  <p><b>Result:</b> The <i>Required Documents</i> screen appears.</p>
7	<p>Upload any required documents, then select <b>Submit</b>:</p>  <p><b>Result:</b> 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><b>Result:</b> A Desktop activity appears once the policy change has issued.</p>

End Procedure