

## **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. <i>Note:</i> Agent-initiated policy changes may require Underwriter review and approval or are auto-approved.					
Procedure	The proced Underwrite To create a <b>Step</b> 1	ure for processing a policy chang ers. A policy must issue before a p policy change, first access the policy Action Select Actions, then Change Result: The Start Policy Change screen appears.	e is essentially the same policy change can be in policy, then: e Policy: Policy Contract Policy Type Questions Eligibility Questions Policy Info Property Address Info Coverages Dwelling Dwelling Construction Premium Estimate Forms	go to         Account File         Policy Eile         Create         New Note         New Performance Violation         New Activity         New Inderwriting Event         Pre-Renewal Direction         Copy Submission         New Transaction         Change Policy		
			Forms Date   09/27/2024	Cancel Policy Rescind Cancellation		

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## Policy Change, Continued

Procedure,	Step	Action	
continued	2	Enter the effective date of t the calendar icon:	he policy change, or select it from
		Start Policy Change	Next > Cancel
		Effective Date	* 05/13/2025 🗰
		Description	
		<i>Note:</i> 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.	
	3	Enter a description for the	change:
		Start Policy Change	Next > Cancel
		Effective Date	* 05/13/2025
		Description	
	4	Select Next:	
		Start Policy Change	Next > Cancel
		Effective Date	* 05/13/2025
		Description	

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## Policy Change, Continued

Procedure,	Step	Action		
continued	5	Use the sidebar menu to navigate to the applicable page and make the change:		
	b	Next       Premium Estimate       Save Draft       Close Options         Result:       The Premium Estimate       screen appears.       Review any changes in premium.		

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## Policy Change, Continued

Procedure.	Step	Action		
continued	6	Select Edit Transaction if edits are needed to the policy		
		change:		
		Premium Estimate Back Next Edit Transaction Issue Transaction Close Options • Print Options •		
		Select <b>Request Approval</b> to submit the change.		
		Premium Estimate Back Next Edit Transaction Close Options  Request Approval Print Options		
		<b>Result:</b> The <i>Required Documents</i> screen appears.		
	7	Upload any required documents, then select <b>Submit</b> :		
		Required Documents		
		Search Results		
		Upload Upload Multiple Link Unlink SUBMIT		
		<b>Result:</b> The policy change status changes to <i>Policy Change</i> ( <i>Pending UW Decision</i> ), or for auto-approved policy changes, the status changes to <i>Policy Change (Bound)</i> .		
	8	Navigate to the <i>Payment</i> screen to confirm change in premium.		
		Payment		
		< Back Next > Save Draft Close Options		
		<b>Result:</b> A Desktop activity appears once the policy change has issued.		

End Procedure