

Policy Change Request

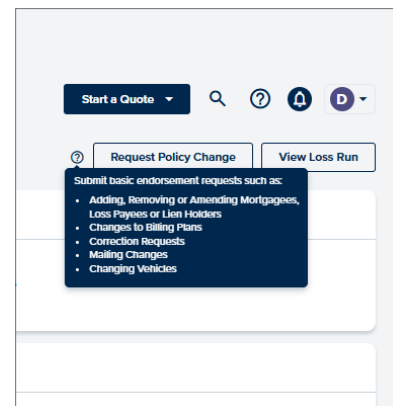
Policies in Agent Portal

The Request Policy Change feature is available to certain agents from the Policy Details page. Agents can use this feature to submit a change request for the policy currently being viewed.

Agents may submit requests for basic endorsement changes, including:

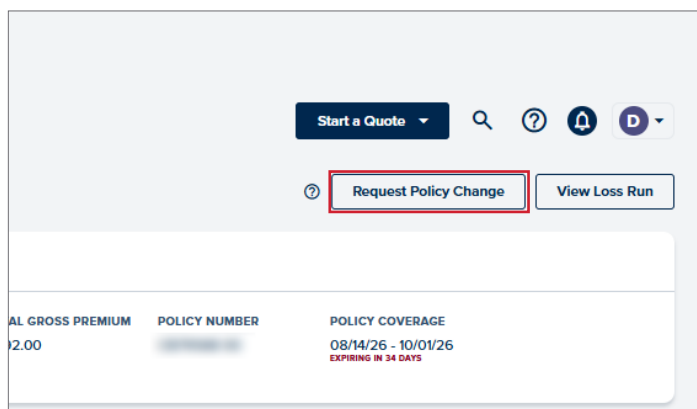
- Adding, removing, or updating mortgagees, loss payees, and lienholders
- Modifying billing plans
- Correcting policy information
- Updating mailing addresses
- Adding, removing, or changing vehicles

The request is sent to a shared mailbox monitored by the Underwriting team.



Submit a Policy Change Request

1. From the Policy Details page, select **Request Policy Change**.



2. On the Request Policy Change form, complete the following steps:
 - a. Select a change type from the **Type of Change Request** drop-down menu.
 - b. Enter the requested changes in the **Policy Change Request Details** text box.
 - c. Upload any supporting documents, if applicable.
 - d. Select **Send me a copy of this communication** to receive a copy of the request.

Note: The Type of Change Request drop-down menu is not available for every business unit. If the menu does not appear, use the Policy Change Request Details text box to describe the requested changes.

3. When finished, select **Submit Request**.

A screenshot of the 'Request Policy Change' form. The form is titled 'Request Policy Change' and has a close button (X) in the top right corner. It is divided into several sections: 'Policy Information' (with fields for INSURED NAME, PRODUCT, POLICY NUMBER, and POLICY COVERAGE), 'Change Request' (with a sub-header 'Please provide more information about the changes you would like to request. Optionally, you can upload any supporting documents.'), 'TYPE OF CHANGE REQUEST' (a drop-down menu), 'POLICY CHANGE REQUEST DETAILS' (a text box with a placeholder 'Describe the changes you would like to request (e.g. Cancel Policy)' and a character count '0 / 2000'), 'UPLOAD SUPPORTING DOCUMENTS (OPTIONAL)' (a section with a cloud upload icon and text 'Drop file here or choose a file to upload. Limit: 10 MB'), and a checkbox labeled 'Send me a copy of this communication.' which is checked. At the bottom right, there are 'Cancel' and 'Submit Request' buttons. Red rectangles highlight the 'TYPE OF CHANGE REQUEST' drop-down, the 'POLICY CHANGE REQUEST DETAILS' text box, the 'UPLOAD SUPPORTING DOCUMENTS' section, and the 'Send me a copy of this communication.' checkbox.