PL Change Request

Jack Bradley: PL Change Request

Revision History

Version	Revision Date	Description	Maker	Reviewer	Approver (Agency)
1.0	11/30/2023	PL Change Request	Asmita Das	Operations Excellence Team	-

Overview: -

During the effective term of a policy insured can request for change in the policy in the form of addition or removal of coverage, co-insured, mailing address, mortgage, lien holder, additional insured, etc. These changes in the policy may or may not affect the premium. These policy changes are treated as an endorsement of the policy.

Workflow task: -

- TAT for the task – 12 hrs
- For any query – MB will reach out to Renee Ivie

Steps: -

MB will receive the task via Activity list. We need to complete the task and keep a follow-up on our end for 7 business days. Once the task is completed. We will close the activity. However, if we face any issue/ query while processing the task, we need to make a note regarding the same and assign the activity to Renee Ivie on the same day.

PL Change Request

1. We will receive this task via Activity list
2. Double click on the activity to enter the Insured's account
3. Check if the Change Request has been processed or not. If the answer is **YES**, we will treat the task as an Endorsement. If the answer **NO**, follow the below steps:
4. Click on Access and select Attachments
5. Open the Change Request form to get the complete information of change that needs to be processed
6. Look up for the mandatory points:
   A. Effective Date, Requester, Policy #, etc
   B. Change Description:

7. Make an activity note notifying that MB has reviewed the change form and started working on the assigned task
8. Identify the change request activity that needs to be processed
9. Make the activity note to notify that MB has started working on the assigned task
10. Then, login into carrier website through Lastpass and make the required changes as the Policy change form
11. After completing the changes in the carrier website, download the confirmation document/screenshot
12. Attach the confirmation document into the EPIC activity
13. Provide all the change related information into the activity note and set the follow up for 7 business days to Processing Team 1

PL Change Request – MARBLE BOX SOLUTIONS LLP