



# Policy Change Request

A Management System Feature

EZLynx is excited to introduce the Policy Change Request feature that simplifies the change request submission and validation process. EZLynx empowers your agency to cater to your consumer's policy change requests more efficiently. Now, more than ever, you can position your agents as trusted advisors to your customers. This feature is enabled for Commercial Auto at this time. Stay tuned as other lines will be rolled out throughout the course of this year.

## As part of this feature:

- [Users create a policy change request in EZLynx](#)
- [Submit the policy change request to carriers or insureds](#)
  - [Add Note](#)
  - [Email](#)
- [Verify the accuracy of the processed change request](#)
  - [Manual Policies](#)
  - [Downloaded Policies](#)

## Create a Policy Change Request

To create:

- Locate the policy
- Click **Actions**, and select **Change Request**
- In the Change Request modal:
  - Specify the change date, or the effective date of the change request
  - Add remarks about the change request in the Policy Change Description field. Leverage this remarks section to pre-fill the ACORD 175 and the change request memo.
- Step By Step alerts make the change request process seamless.
- When ready, click **Edit Change Request**.

Change Request Policy 12334

Step 1 of 3: Review basic change request detail and click "Edit Change Request" to continue.

Line of Business \* Auto (Commercial) Rating State \* TX

Change Date \* 07/19/2017

Billing Company \* AAA Insurance - Western Unit

Master Company \* AAA Insurance - Western Unit

Writing Company ---Select---

LOB Orig. Date 6/15/2017

Enter Policy Change Description

Cancel Change Request Edit Change Request



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- On the policy entry screen, enter all the details about the Change Request. For example, if you want to add vehicles, click the **Vehicles** tab to add desired vehicles.

Overview Policies Details Quotes Lead Info Contacts Documents Requests Activity Invoices Invoices

Policy Number: 12334 - Active  
Line of Business: Auto (Commercial) | Term: 6/15/2017 - 6/15/2018 | Carrier: AAA Insurance - Western United | Full Term Premium: \$10,000.00 | Source: Manual

Step 2 of 3: Make your changes for the Change Request. Click "Preview" to preview change request. Click "Save and Close" to confirm your changes.

Save & Close Preview Cancel < Previous Next >

Insured Information Coverages Vehicles Drivers Underwriting Additional Interest

Vehicle	Year	Make	Model	V.I.N.	Body Type	Add Vehicle	Import
1	2016	ACURA	ILX BASE	19UDE2F36G111111	SEDAN 4	Actions	

Save & Close Preview Cancel < Previous Next >

- Click **Preview** to see the changes. Verify the changes appear as expected, then click **Save & Close**.

Policy Compare

Preview the change summary in the Policy Compare. Close the Preview to return to the previous screen.

Insured Info Print

Named Insured(s):  
Change Request Demo Only DO NOT USE PLEASE  
5100 usaa blvd  
San Antonio, TX 78240  
Expand All/Collapse All

Version 1: AUTOB - Policy Number: 12334 (Latest) Version 2: 07/20/2017 - PCR - \$0.00 Compare

Version 1 Version 2  
AUTOB - Policy Number: 12334 (Latest) 07/20/2017 - PCR - \$0.00

Business Auto Information collapse

Commercial Driver :1 collapse

Person Surname	Matthew
Given Name	James
Tax Id	953-88-2928
Address Type Code	StreetAddress
Address 1	5100 usaa blvd
City	San Antonio
state Province Code	TX
Postal Code	78240

- After clicking **Save & Close**, you are directed to the **Review Change Request** screen.
- At this point, the change request memo is automatically saved to the applicant's **Documents** tab and is associated to the policy.

- The generated memo contains:
  - Line of business
  - Policy term
  - Carrier name
  - Policy number
  - Change effective date
- When a vehicle or driver is added, the **To** column displays the updated details in **GREEN**, and the **Change Type** indicates what is being added.
- When a vehicle or driver is deleted the **From** column displays the data in **RED**. The **To** column is blank and the Change Type is **Delete**.

Policy Change Request		
Policy Change Request is the summary of proposed changes to the policy		
NAMED INSURED AS LISTED ON THE POLICY		
Change Request Demo Only DO NOT USE PLEASE		
StreetAddress 5100 usaa blvd San Antonio TX 78240		
Line of Business: Auto (Commercial)   Term: 6/15/2017-6/15/2018   Carrier: AAA Insurance - Western United   Policy Number: 12334   Policy Change Effective Date: 7/20/2017		
From	To	Change Type
Business Auto Information		
Commercial Driver:1		Add
PersonSurname	Matthew	
GivenName	James	
TaxId	953-88-2928	
AddressTypeCode	StreetAddress	
Address1	5100 usaa blvd	
City	San Antonio	
stateProvinceCode	TX	
PostalCode	78240	
GenderCode	M	
BirthDate	1984-07-11	

## Submit the Policy Change Request to Carriers or Insureds

Perform any action below from the **Review Change Request** screen:

- **Send eSignature** to insured
- **Add Note or Task** for change request
- **Email** the change request memo to the carrier
- **Print** the memo

Step 3 of 3: Review Change Request. Click Actions to share the change request.

### Review Change Request

- Click Actions to share the change request.  
- View this change request transaction in the Policy History tab.

Actions \*

- Add Note
- Email
- Print
- e-Signature

**Policy Change Request**

Policy Change Request is the summary of proposed changes to the policy

NAMED INSURED AS LISTED ON THE POLICY

Change Request Demo Only DO NOT USE PLEASE

StreetAddress 5100 usaa blvd San Antonio TX 78240

Line of Business: Auto (Commercial) | Term: 6/15/2017-6/15/2018 | Carrier: AAA Insurance - Western United | Policy Number: 12334 | Policy Change Effective Date: 7/20/2017

From	To	Change Type
Business Auto Information		
Commercial Driver:1		Add

## If you click Add Note:

- The change request memo is attached to the note
- Remarks pre-fill into the note field
- A label called **Policy Change Request** is added
- The note is associated to the policy

## If you click Email:

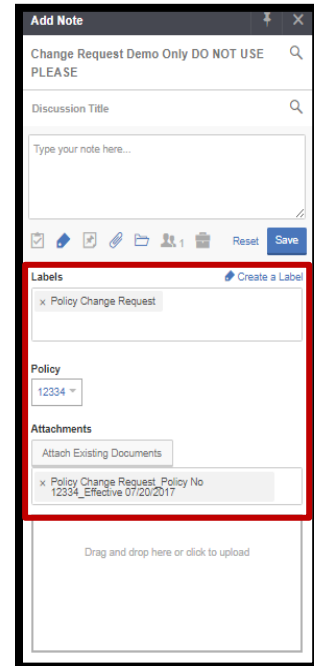
- The email dialog opens with the change request memo attached.
- Include additional remarks in the body of the email.
- Send the change request memo to the carrier or insured.

**EZTIP:** The created change request is under the policy's History tab, and is highlighted to differentiate it from regular policy transactions.

## Verify the Accuracy of the Processed Change Request

### For manual policies:

- When the carrier sends confirmation of the, click **Confirm Change**.
- Enter the **Change Premium**.
- Click **Change & Edit Policy** to save.
- The change request is now converted to a policy change transaction under the policy's **History** tab.





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## For downloaded policies:

- The carriers download the policy change.
- Compare the change request against the policy change to confirm the requested changes were processed correctly.
  - If the changes were processed correctly, you will see no differences when you compare the change request against the downloaded policy change.
  - If you do not want to confirm the change request, simply close the compare window to return to the **History** screen.
- When ready, click **Confirm**, and the change request is removed from the **History** screen.

Questions? Contact [support@ezlynx.com](mailto:support@ezlynx.com)