



## Creating an Effective Date Change Request

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<b>What</b>	How to create an <b>Effective Date Change Request</b> for a bound approved or bound unapproved new business Submission.
<b>Who</b>	Agents
<b>When</b>	Agents are able to request effective date changes for new business submissions that meet the following criteria: <ul style="list-style-type: none"><li>• The risk is in the agency's book of business.</li><li>• The status of the risk is Bound-Approved or Bound-Unapproved.</li><li>• There is no premium applied to the policy.</li><li>• No claims have been reported on the policy.</li><li>• The effective date change is being made due to a real estate closing date change. The new effective date can be prior to or after the original requested effective date, as long as it is not past today's date.</li></ul>

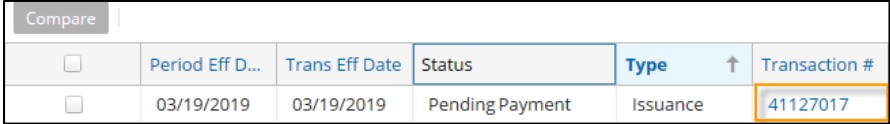
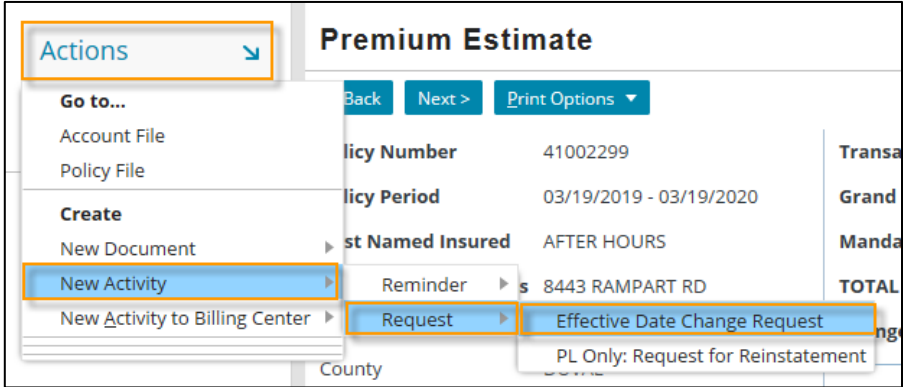
Note: The effective date can be changed multiple times within the first 45 days of the original submission date.

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### Create an Effective Date Change Request

Follow the steps below for an **effective date change request** on a new submission:

Step	Action
1	<p>Initiate the <b>Effective Date Change Request</b> activity.</p> <ul style="list-style-type: none"> <li>From the <i>Policy Summary</i> screen under Transactions in Progress, access the Issuance transaction that has payment pending.</li> </ul>  <ul style="list-style-type: none"> <li>Click <b>Actions</b>.</li> <li>Select <b>Effective Date Change Request</b> from the <b>Request</b> sub-menu of <b>New Activity</b>.</li> </ul>  <p><b>Result:</b> The <b>New Activity</b> workspace displays at the bottom of the screen</p>

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## Creating an Effective Date Change Request, continued

**Create an Effective Date Change Request,**  
continued

Step	Action
2	<p>Complete the <b>Effective Date Change Request</b> activity.</p> <ul style="list-style-type: none"> <li>• Enter the <b>Description</b> of the activity.</li> <li>• Enter details regarding why the effective date change is being requested in the <b>New Note</b> Text section. The note will be saved to the policy.</li> <li>• If needed, select the <b>Link Document</b> button to attach an already uploaded document.</li> <li>• Click <b>OK</b>.</li> </ul> <div data-bbox="553 716 1450 995" data-label="Form"> </div> <p><b>Result:</b> The <b>Effective Date Change Request</b> activity is sent to an underwriter for review. Once the request is processed, a note will appear in the Notes section of the submission to confirm a change was made.</p>

*End of procedure*