Creating an Effective Date Change Request

**What**
How to create an Effective Date Change Request for a bound approved or bound unapproved new business Submission.

**Who**
Agents

**When**
Agents are able to request effective date changes for new business submissions that meet the following criteria:

- The risk is in the agency’s book of business.
- The status of the risk is Bound-Approved or Bound-Unapproved.
- There is no premium applied to the policy.
- No claims have been reported on the policy.
- 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.

Note: The effective date can be changed multiple times within the first 45 days of the original submission date.
Create an Effective Date Change Request

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

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| 1    | Initiate the **Effective Date Change Request** activity.  
- From the *Policy Summary* screen under Transactions in Progress, access the Issuance transaction that has payment pending.  
- Click **Actions**.  
- Select **Effective Date Change Request** from the **Request** sub-menu of **New Activity**.  

**Result:** The **New Activity** workspace displays at the bottom of the screen
Creating an Effective Date Change Request, continued

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| 2    | Complete the Effective Date Change Request activity.  
|      | • Enter the Description of the activity.  
|      | • Enter details regarding why the effective date change is being requested in the New Note Text section. The note will be saved to the policy.  
|      | • If needed, select the Link Document button to attach an already uploaded document.  
|      | • Click OK. |

**Result:** The Effective Date Change Request 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.

*End of procedure*