Once a policy is issued, an agent cannot change the policy effective date. A common scenario that requires an effective date change is when the policyholder’s closing has been delayed.

This job aid demonstrates how to cancel the incorrect policy and resubmit a new application with the correct effective date. (For an effective date prior to the date of submission, contact underwriting to verify eligibility at 1-800-788-8247, Option 2.)

Create a New Submission with Revised Information

**Step One:**

Navigate to the original submission.

Then select Actions-> Copy Submission to create a copy of the original submission.

**Step Two:**

A new submission will appear with all information copied from the original submission.

Change any information that caused the need to resubmit the policy. (e.g. Effective Date)

**Step Three:**

When processing the payment on the new submission, two situations can occur:

<table>
<thead>
<tr>
<th>If paying for the new submission by:</th>
<th>Then take the following action in the Payment Dropdown Menu:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transferring funds from the policy being cancelled</td>
<td>Select Check/Money Order</td>
</tr>
<tr>
<td>Submitting a new payment</td>
<td>Select the new payment type</td>
</tr>
</tbody>
</table>

Complete any other required fields and then click **Submit to TWIA**.
Then Cancel the Incorrect Policy

**Step Four:**
Navigate to the original policy with the incorrect information. Then select Actions - Request Cancellation to cancel the policy.

The Start Cancellation Screen appears. On this screen there are important fields to complete:

- **Reason:** For a cancellation and resubmission select Other
- **Document Type:** Select Document for Cancellation
- **Other Reason:** Enter the following information to connect two policies together: Reason for cancellation, new transaction number, and premium payment instructions (if needed)
- **Cancellation Effective Date:** This date will be effective the inception date of the policy

Complete any other required fields and then click **Submit to TWIA**

**Special Note -** Transferring funds from the cancelled policy could delay issuance of the new policy. If proof of coverage is time sensitive, we recommend submitting the new policy with an electronic form of payment (EFT/eCheck). A refund check on the cancelled policy will be mailed to the policy holder. **