



Change a Policy

1 How to begin a policy change

The screenshot shows a web application interface. On the left, a navigation menu is open under the 'Actions' header. The 'Change Policy' option is highlighted with a red box. A red arrow points from the 'Change Policy' option to the 'Change Policy' button in the main content area. The main content area is titled 'Summary' and contains two columns of information. The left column is titled 'Home Office' and contains 'Account Information', 'Official IDs', and 'Policy' sections. The right column is titled 'Set up an Online Account' and contains 'Period', 'Producer of Record', and 'Producer of Service' sections.

Home Office	
Account Information	
Account Number	0000000014
Account Name	dave tester
Address	123 E Main St Amelia, OH 45102-1945
County	Clermont
Address Type	Home
Address Description	
Official IDs	
SSN	***-**-5689
Policy	
Policy Type	Dwelling Basic
Number	900002062
Previous Policy Number	
Issued	Yes

Set up an Online Account	
Period	
Effective Date	07/28/2015
Expiration Date	07/28/2016
Term Number	1
Total Premium	\$471.00
Taxes And Fees	-
Total Cost	\$471.00
Producer of Record	
Producer Code	999006
Contracted Agency	Testing for Atlas Inc
Producer	Testing for Atlas Inc
Producer of Service	
Home Office	
Producer Code	999006

Click on the "Actions" drop-down menu and select "Change Policy."

2 Special Policy Changes

Out-of-sequence change - Describes a policy transaction change whose effective date is earlier than the effective date of another policy transaction that is already bound on the policy for the contractual period.

Preemptive change - A change that occurs when there is already an open policy change submitted for this policy period.

[Click here to access the Out-of-sequence job aid.](#)