Filing Refresh

Overview/Policy

A refresh enables the user to update the un-submitted filing in the System with the latest information available.

There are several scenarios where the "*Refresh*" screen displays and a user may accept or reject changes. Below is a list of the most common:

- There is a new form version of the pending filing (Company, Branch or Individual MU forms) and a user can accept those changes and edit/submit a new form version.
- A License status was updated after an action request was entered on the filing or License status that was available on the filing is terminated.
- When a company's *Tax ID* is updated and that company is listed as a Direct or Indirect Owner on a pending Company (MU1) Form, the System allows the filing company to refresh the information and populate the filing with the updated Tax id.

There are two scenarios where the "Refresh" screen displays and the user must accept changes by clicking **Refresh**:

- *License/Employment* information has changed since the last refresh and the related action on the pending filing.
- One or more *Advanced Change Notices* were processed since the last refresh.

Definitions and Charts

Not applicable.

How To

Refresh the Filing:

1. Click either **Accept Changes** or **Refresh** to update this filing with recent information.

   NOTE: Depending on the scenarios listed above determines the user options listed on the *Refresh* screens below. The example is listed for the Company (MU1) Form, however the same *Refresh* screens exist for Individual (MU2 and MU4) and Branch (MU3) Forms.
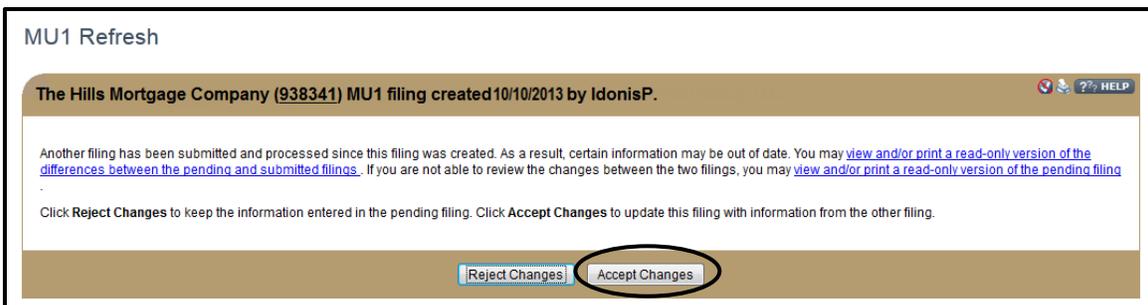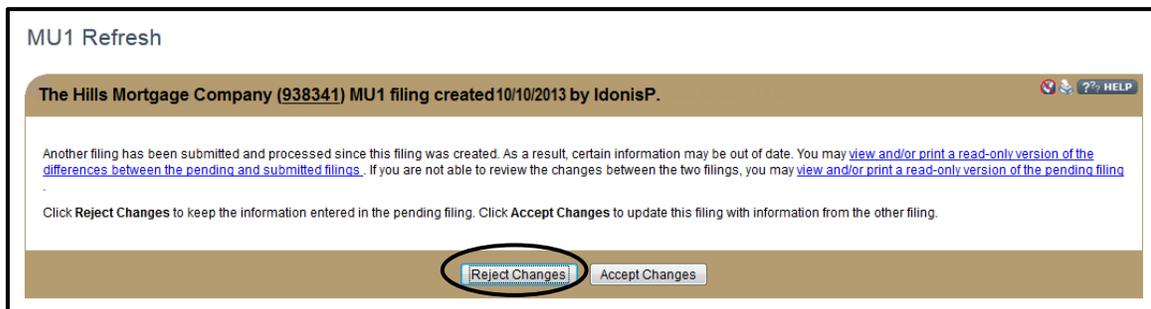

OR
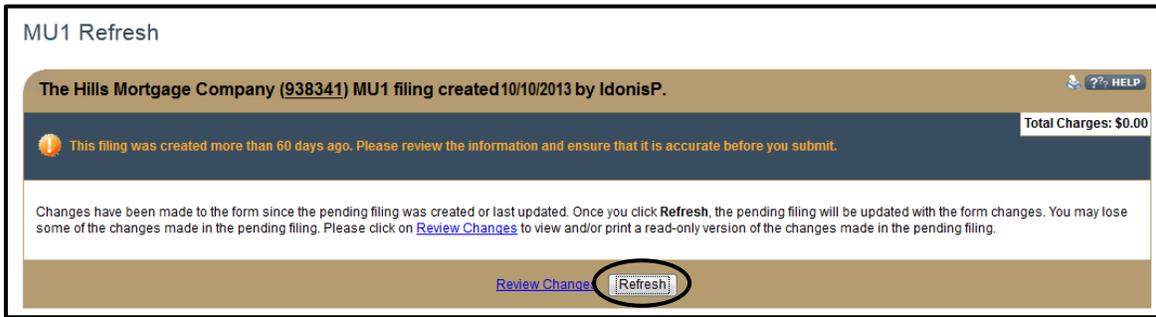
Reject Changes to the Filing

1. Click on **Reject Changes** to keep the information entered in the pending filing.

> NOTE: The example is listed for the *Company (MU1) Form*, however the same *Refresh* screens exist for *Individual (MU2 and MU4)* and *Branch (MU3) Forms*.

Helpful Hints

1. Users have the following options to view read-only version of the *Pending Filing;* Click:
   a. **View and /or print a read-only version of the differences between the pending and submitted filings**
   b. **View and/or print a read-only version of the pending filing**
   c. **Review Changes**

Additional Resources:

- State Specific Requirements

See Company and Branch Help Table of Contents