

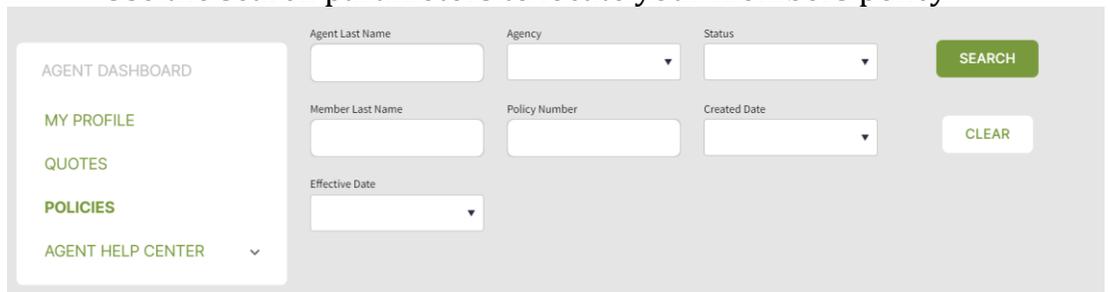
When is an endorsement required?

- An endorsement is required anytime post-bind when a change is required to the policy. This includes premium and non-premium bearing changes.

STEP 1

Locate the policy from the agent home page

- Use the search parameters to locate your members policy



AGENT DASHBOARD

MY PROFILE

QUOTES

POLICIES

AGENT HELP CENTER

Agent Last Name:

Agency:

Status:

SEARCH

Member Last Name:

Policy Number:

Created Date:

CLEAR

Effective Date:

STEP 2

Select the most recent policy version

- When more than one row is listed always pick the top which represents the current policy version

Policy History

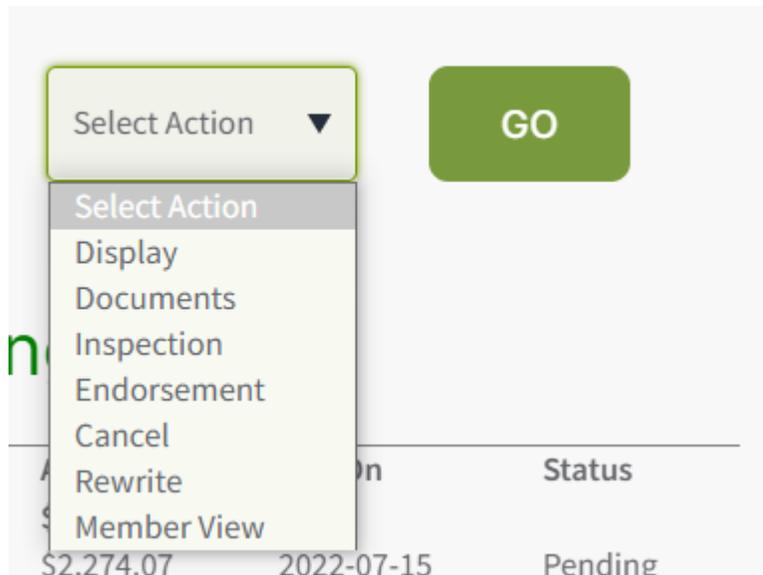
Select Policy Term

CURRENT POLICY NUMBER	ORIGINAL POLICY NUMBER	POLICY EFFECTIVE DATE	POLICY EXPIRATION DATE	TRANSACTION EFFECTIVE DATE	STATUS	QUOTE CREATE DATE	BIND DATE	ENDORSEMENT REASON	
FLO31001028800		2022-07-15	2023-07-15	2022-07-18	Endorsement - Bound	2022-06-17		Mortgage Company - Add Additional	Select
FLO31001028800		2022-07-15	2023-07-15	2022-07-15	New Business - Endorsed	2022-06-17	2022-06-17	-	Select

STEP 3

Select Endorsement From Action List

Select Endorsement



Select Action

GO

Select Action

- Display
- Documents
- Inspection
- Endorsement
- Cancel
- Rewrite
- Member View

\$2,274.07

2022-07-15

Pending

STEP 4

**Update
Fields,
Coverages,
Limits**

- Endorsements work like a new business quote
- Locate the field(s) requiring changes and make appropriate updates
- The system will prompt you if a recalculation is required

**Policy Status
Equals
Pending**

If the policy status is **pending** you will be able to bind/purchase the policy change without underwriting review:

1. Ensure all information is correct
2. Navigate to purchase policy page
3. Click "**Purchase**" at the bottom of the screen

Your policy change has now been bound

**Policy Status
Equals
Underwriting
Review
Required**

If the policy status is **underwriting review require** your change will require approval from underwriting before it can be bound

4. Ensure all information is correct
5. Navigate to purchase policy page
6. Click "**Refer to underwriting**" at the bottom of the screen

Your policy will be sent to the underwriting queue for review, and you will be contacted between 24-48 business hours regarding approval.

**Retrieving a
Pending or
Approved
Policy
Change**

If your policy change was approved by underwriting or you did not bind the policy change during the initial policy change quote, follow these steps to retrieve and bind:

1. From the main agent landing page locate your policy using the search parameters
2. Select the most recent version of the policy. The status should show **endorsement pending** or **endorsement underwriting approved**
3. From the policy summary screen select the "**actions**" drop down
4. Select **display**".
5. Navigate to the purchase policy screen and click "**purchase**"