ENDORSEMENTS

In the SPIN system agents may now create their own endorsements and process most of the requests without underwriting approval. All endorsements are now keyed by the agent and if an UW approval is required the agent will be prompted to "Submit to UW" for approval.

Endorsements not requiring underwriting approval:

- Mailing address change
- Mortgagee or Additional Interest changes
- Additional interest changes
- Adding or removing credits and wind mitigation discounts
- Cancellations
- Deductible changes and optional coverage changes at policy renewal

Endorsements requiring underwriting approval:

- Named insured changes
- Additional Named Insured changes
- Some Coverage changes
- Location address changes

Step 1: To get started with processing an endorsement click on the Policy Tab then select "Start Transaction" located in the Actions panel.

Step 2: Select the type of transaction you would like to process. For an example; **Endorsement**, **Cancellation** or **Renewal Changes**.

Step 3: Enter the Effective Date and a Description of the endorsement. Click Start.

Transaction Selection

Policy Summary	
Policy Number	AGH0000597-01
Insured	Gerald M Bishop
Inception	05/10/2015
Product	Voluntary Homeowners (HO3)
Sub Type	HO3
Term Effective	05/10/2015
Sequence	1-5
Transaction Status	Active

Start Transaction* [Endorsement ▾]
Effective Date* 07/14/2015
Description* Mailing Address change
Additional Declaration Text

[Start] [Cancel]

Step 4: Make the necessary policy change(s) and click Finalize Transaction in the Actions panel.

Actions

Save

Finalize Transaction

Cancel Transaction

Contact Underwriting

View Producer

Order 4-PT or WLM

Step 5: Review changes by clicking Preview Output and then click Endorse Policy to complete the endorsement. Optional: Click Modify Application to make additional changes.

Transaction Request

Application Summary	
Application Number	AP-00002432
Policy Number	AGH0000597
Insured	Gerald M Bishop
Inception	05/10/2015
Product	Voluntary Homeowners (HO3)
Sub Type	HO3
Term Effective	05/10/2015
Premium	$330.25
Status	In Process

Effective Date* 07/14/2015
Description* Mailing Address change
Additional Declaration Text

Transaction Changes

Insured Mailing Address Changed

Output Pending

Pending Output - Endorsement Package

Include	Modified	Document	Recipient	Name	Forms	Delivery Method
☑		Insured Endorsement Package	Insured	Gerald M Bishop	Declaration + Fillin	Batch
☑		Producer Endorsement Package	Producer	Testing Insurance Group	Declaration + Fillin	Local Printer

[Endorse Policy] [Preview Output] [Modify Application]