## **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.

Search	Policy General			
Search Open New Window	Description* Product*	Florida - Voluntary Homeowners (HO3) - American Integrity In	surance Group	
	Effective Date*	05/10/2015	Expiration Date*	05/10/2016
Actions	Producer: Code*	AG1234A1 Testing Insurance Group		
	Policy Source	New Business Application		
Start Transaction	<b>Policy Disposition</b>	None		
View Producer	Prior Carrier*	Castle Key/Allstate	Prior Policy Expiration	05/10/2015
Report a Loss			Date	
Make Payment	Insurance Score			

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

Search	Transaction Selection			
Search Open New Window	Start Transaction* Select Select			
	r F			

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

		Transaction Sele	ction
Policy Summary		Start Transaction*	Endorsement V
Policy Number Insured Inception Product Sub Type	AGH0000597-01 Gerald M Bishop 05/10/2015 Voluntary Homeowners (HO3) HO3	Effective Date* Description* Additional Declaration Text	07/14/2015 Mailing Address change
Term Effective	05/10/2015		
Transaction	Active	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 Re	quest						
Applicatio	on Summary	Effective Date*	07/14/2015						
Application Number	AP-00002432	Description*	Mailing Address change	e					
Policy Number	AGH0000597	Declaration Text	l						
Insured	Gerald M Bishop								
Inception	05/10/2015								
Product	Voluntary Homeowners (HO3)								
Sub Type	НОЗ	Transaction Ch	Transaction Changes						
Term Effective	05/10/2015	Insured Mailing Address Changed							
Premium	\$330.25								
Status	In Process	Output Pending	]						
		Pending Output -	Endorsement Package						
		Include Modified	Document	Recipient	t Name	Forms	Delivery Method		
			Insured Endorsement Package	Insured	Gerald M Bishop	Declaration + Fillin	Batch		
		$\checkmark$	Producer Endorsement Package	Producer	Testing Insurance Group	Declaration + Fillin	Local Printer		
		Endorse Policy	Preview Output Mo	dify Applicat	ion				