

This presentation will
assist you in the
process of submitting
Endorsements through
the Finys system.



Welcome



**SECURITY MUTUAL
INSURANCE COMPANY**
Established 1887



**SECURITY COOPERATIVE
INSURANCE COMPANY**
Established 1910

Submitting Endorsements for Finys

Key Reminders

- For your **Errors and Omissions** protection, we highly recommend that you retain a signed document of requested policy changes.
- Signed authorization is needed to remove a named insured. The person being removed must give authorization for their name to be removed.
- Please allow 5-7 business days for completion.
- Do not send duplicate requests.
- Call if an Endorsement has been submitted with an urgent status.
- ACH/Pay plan changes are **NOT** to be sent to Endorsements. They are to be sent to the Direct Bill department.
- Attach photos, documents, appraisals, or other pertinent information for a change.
- Notify Security Mutual when any change of occupancy occurs, ie: Death, Moving, Divorce, Primary or Secondary/Seasonal Change.
- Any coverage questions are to be directed to Underwriting Department.

Let's Get Started!

Sign in

 [Agent Login](#)

[About Us](#) ▾ [Products](#) ▾ [Insured](#) ▾ [Find an Agent](#) [Become an Agent](#) [MAKE A PAYMENT](#)

Agent Login

[Forgot Password?](#)

Do you have a saved password that is not appearing on our new website?
[Try this alternative login page.](#) If your saved password is still not displayed,
use the Forgot Password function to reset your password.

Select Finys Suite

 [Agent Resources](#) [Logout](#)



[About Us](#) [Products](#) [Insured](#) [Find an Agent](#) [Become an Agent](#)

MAKE A PAYMENT



Agent Resources



Finys Suite



AgentXpress



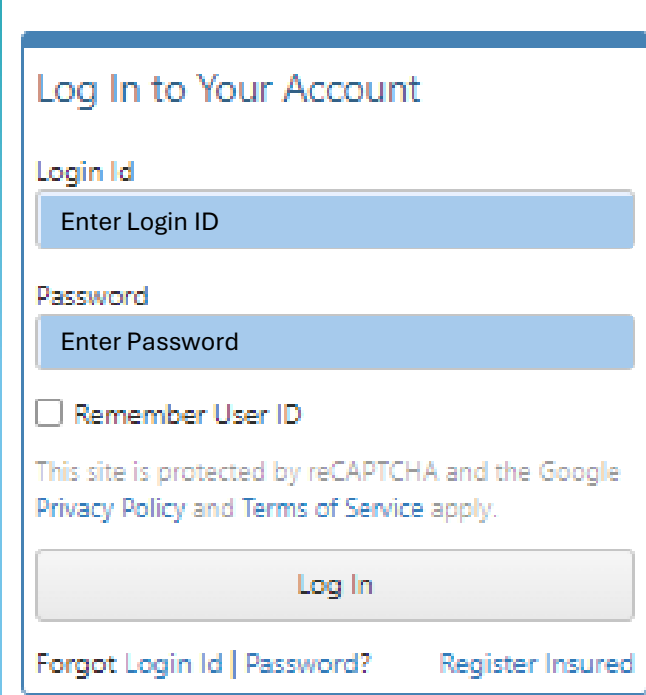
Contact Us



Request A Quote

Log Into Finys

Disclaimer! UAT screens may be different from screens agents see



The screenshot shows a login form titled "Log In to Your Account". It contains two input fields: "Login Id" with a placeholder "Enter Login ID" and "Password" with a placeholder "Enter Password". Below these fields is a checkbox labeled "Remember User ID". A line of text states: "This site is protected by reCAPTCHA and the Google Privacy Policy and Terms of Service apply." At the bottom of the form is a "Log In" button. Below the button are two links: "Forgot Login Id | Password?" and "Register Insured".

Log In to Your Account

Login Id

Enter Login ID

Password

Enter Password

☐ Remember User ID

This site is protected by reCAPTCHA and the Google Privacy Policy and Terms of Service apply.

Log In

[Forgot Login Id | Password?](#) [Register Insured](#)

Need Help?

password@securitymutual.com

call your Territory Manager

SUBMITTING ENDORSEMENTS Through the Finys System.

Endorsements Through Finys can be submitted in 1 of 2
simple processes



Submit by a Task



Submit by a Referral



This means you create a task of the Endorsement that needs to be processed, and you do not go into the policy itself to make the changes.

Basically, this will be same as if you were submitting a change by sending an Email.

You will provide the Effective date of the change and a detailed description of the change that is needed. You will also provide a short explanation of the change to substantiate the change and reasoning behind the change.

Uploading of documents will also be an option and necessary for the removal of coverage or a named insured.

Submit an Endorsement by Task

Submit an Endorsement by Task

Okay, lets get started.

Enter the Policy Number or you can
search by the Insured's name.

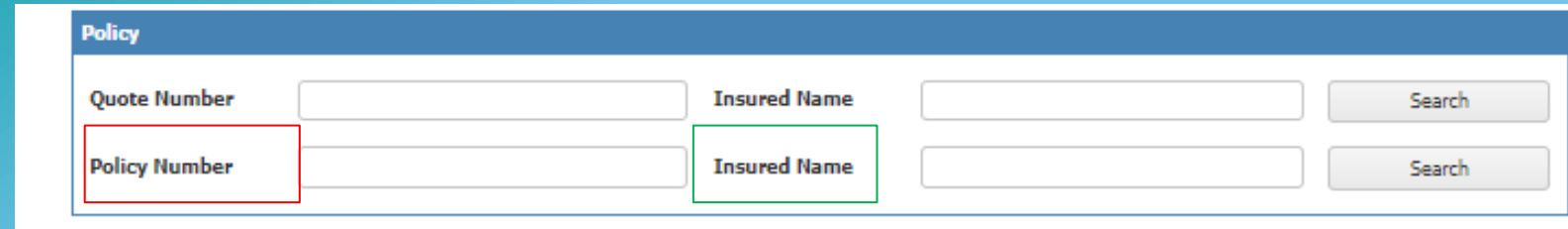
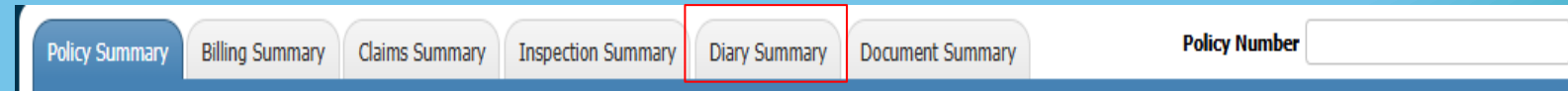


This will then take you to the main policy
page.

You will see the Navigation Tabs at the
top.



You will then select the Diary Summary
Tab.

A screenshot of a web form titled "Policy". It contains two rows of input fields. The first row has "Quote Number" and "Insured Name" fields, followed by a "Search" button. The second row has "Policy Number" and "Insured Name" fields, followed by a "Search" button. The "Policy Number" field is highlighted with a red border, and the "Insured Name" field in the second row is highlighted with a green border.A screenshot of a navigation bar with several tabs: "Policy Summary", "Billing Summary", "Claims Summary", "Inspection Summary", "Diary Summary", and "Document Summary". The "Diary Summary" tab is highlighted with a red border. To the right of the tabs is a "Policy Number" label followed by an input field.

After selecting the Diary Summary Tab, you will be taken to the next screen.

Here you will then select the Add Task Button.

The next screen you will see is where you will indicate what the task is, which department to send the task to and attach any needed documents.

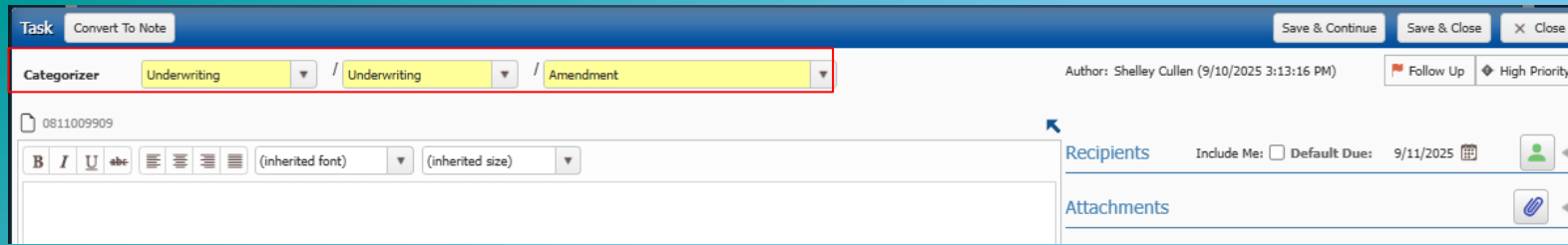
This screenshot shows the 'Add Task' form. At the top, there are buttons for 'Add Note' and 'Add Task', with the latter highlighted by a red box. To the right of these buttons is a red notification icon and the text 'Set Task Status to "Incomplete" to view pending tasks'. Further right are 'Search' and 'Clear' buttons. Below this is a search bar. The main form area contains several fields: 'Task Status' (dropdown), 'Department' (dropdown), 'Type' (dropdown), 'Tag Field' (dropdown), 'Tag Value' (text input), 'Created By' (dropdown), 'Recipient' (dropdown), 'Diary Type' (dropdown), 'Diary Text' (text input), 'User Tags' (dropdown), 'Date Created' (calendar), 'Due Date' (calendar), and 'Priority' (dropdown).

This screenshot shows the 'Task' form. At the top, there are buttons for 'Convert To Note', 'Save & Continue', 'Save & Close', and 'Close'. Below these are three dropdown menus for 'Categorizer'. To the right of these is the text 'Author: Shelley Cullen (9/10/2025 3:06:15 PM)' and two buttons: 'Follow Up' and 'High Priority'. Below the categorizer is a text input field with the value '0811009909'. To the right of this is a 'Recipients' section with a dropdown arrow. Below the recipients is an 'Attachments' section with a dropdown arrow and a paperclip icon. The main body of the form is a large text area with a rich text editor toolbar at the top, including buttons for bold, italic, underline, and other formatting options, as well as font and size dropdowns.

To select the Department, you will select the Categorizer. Using the down arrows, you will select **Underwriting / Underwriting /Amendment** for the entry fields.

After you have those selected the next step is to send your task to the correct department. To do this you will need to select the Green Icon.

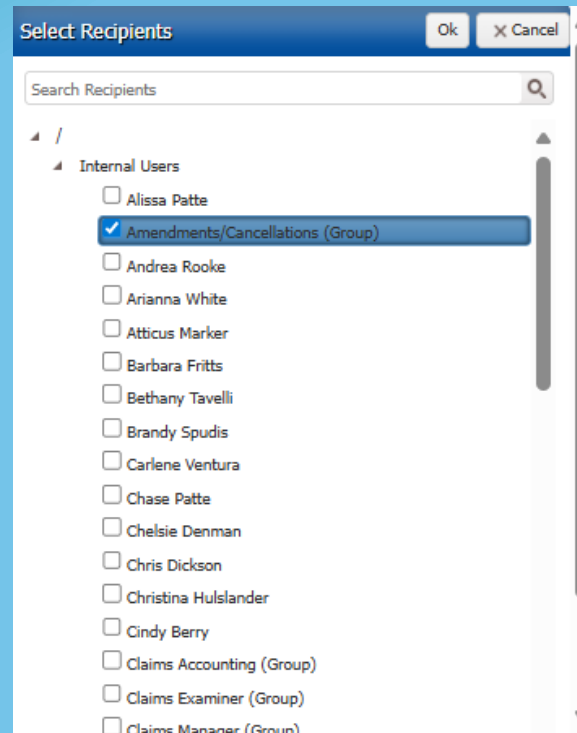
Select Recipients will pop up. For Endorsements, you will use the **Amendment/Cancellation (Group)** and select OK.



The screenshot shows a 'Task' window with a 'Convert To Note' button. The 'Categorizer' dropdown menu is open, showing a hierarchy: 'Underwriting' / 'Underwriting' / 'Amendment'. The 'Amendment' option is selected. The window also displays the author 'Shelley Cullen (9/10/2025 3:13:16 PM)', a 'Follow Up' button, and a 'High Priority' status. The task ID '0811009909' is visible. The 'Recipients' and 'Attachments' sections are also present.



The screenshot shows the 'Recipients' section of the task window. It includes the text 'Include Me: ☐ Default Due: 9/11/2025'. A green icon representing a user is highlighted with a red box.



The screenshot shows the 'Select Recipients' dialog box. It has a search bar and a list of internal users and groups. The 'Amendments/Cancellations (Group)' is selected with a blue checkmark. The list includes: Alissa Patte, Andrea Rooke, Arianna White, Atticus Marker, Barbara Fritts, Bethany Tavelli, Brandy Spudis, Carlene Ventura, Chase Patte, Chelsie Denman, Chris Dickson, Christina Hulslander, Cindy Berry, Claims Accounting (Group), Claims Examiner (Group), and Claims Manager (Group).

Almost there.

Now you describe the Endorsement that needs processing.

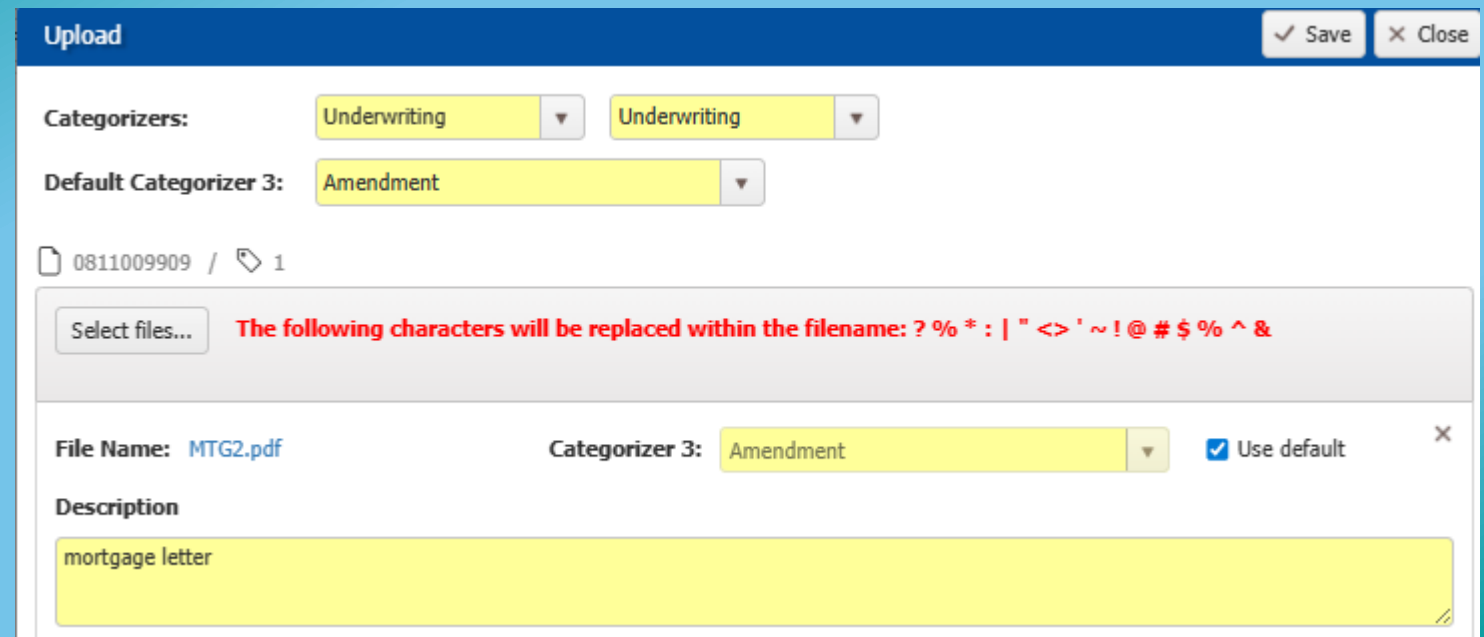
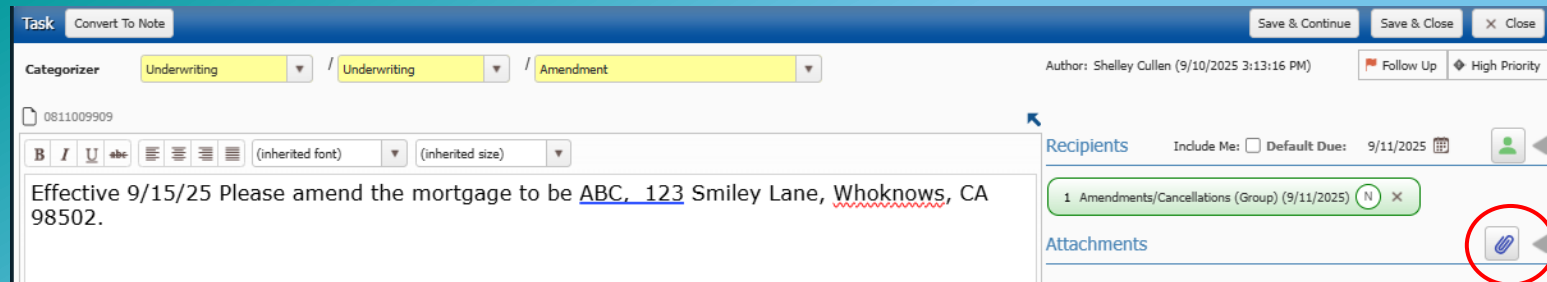
Simply type your change request in the large white section. **Remember, we need effective dates** and as much detail regarding the change as possible.

To Upload documents you will select the paper clip. Fill the Categorizers again as **Underwriting/Underwriting/Amendment**.

Then drag and drop your document to the red lettering. Enter the description of the document and save.

Save and Close.

Now the task has been sent for processing.





This means you physically go into the policy itself and make the necessary changes. You fill in all the entry fields.

You will provide the Effective date of the change.

If the change is needed on current and renewal terms, you will need to submit your changes on BOTH terms. If the Renewal term has already been printed (53 days prior to renewal date) you will need to go back into the policy and amend on the renewal term as well.

You will also provide a short explanation of the change to substantiate the change and reasoning behind the change.

Uploading of documents will also be an option. These are necessary for the removal of coverage or a named insured.

Submit an Endorsement by Referral

Submit an Endorsement Referral

Enter the Policy Number or you can search by the Insured's name.



Select the Amend button for the correct policy term.



Enter effective date of Change and confirm



Policy

Quote Number		Insured Name		Search
Policy Number		Insured Name		Search

Policy Summary | Billing Summary | Claims Summary | Diary Summary | Document Summary

Policy Number

Account Number: 1003062 TEST AMENDMENT 1 Policy Number: 0111004573
2417 N TRIPHAMMER RD A/C ASSOCIATES OF NY INC Terms: 1
ITHACA NY 14850-1013 11/26/2024 to 11/26/2025
ACTIVE
Renewable

Paid In Full Nothing Due	Payment History 1 in the last 30 days View Payments	Last Payment \$1,289.93 paid on November 26, 2024
------------------------------------	--	--

	Term	Effective	Expiration	Premium	
Amend	1	11/26/2024	11/26/2025	\$1,289.93	Active

	Change	Effective	Date	Term Premium
Select Inquire	NEW BUSINESS	11/26/2024	11/26/2024 3:57 PM	\$1,289.93

Effective Date

Effective Date

Start your changes

NOTE on Address changes:

When doing an address change, the **Insured's address** should be entered as the **LOCATION/RISK** address and the **Mailing address** should be entered as the **MAILING** address.

You will also have to make sure to select the **postal icon** to standardize the addresses.

Make sure to check the box within the mailing address if the addresses are the same.

You will have to standardize the addressed by selecting the postal icon.

Remember to go to the Location Tab to update location address if changed.

Insured

Policy

Location

Premises

Pricing

Reports

Amend

TEST AMENDMENT 1
Policy : 0111004573
Term : 11/26/2024 - 11/26/2025
Change Eff. Date : 01/01/0001

Save and Close

Undo Amendment

Continue

Effective Date12/2/2024

Expiration Date11/26/2025

Policy Term12 Months

Inception Date11/26/2024

Agent403000 - A/C ASSOCIATES OF...
403000 - A/C ASSOCIATES OF NY INC
11198 ALEXANDER RD, ATTICA NY 14011

Primary Insured

Insured TypeBusiness

Legal EntityIndividual

Business NameTEST AMENDMENT 1

DBA/TA

Business Phone Number

Alternate Phone Number

Phone Fax

Email

Insured's Address

Mailing Address

Mailing same as insured?

Address TypelocationSelect...

Address Name

Street Address

Apartment, Suite, Etc.

City

State/TerritoryNew York

Zip code

CountryUnited States of America

Address TypemailingSelect...

Address Name

Street Address

Apartment, Suite, Etc.

City

State/TerritoryNew York

Zip code

CountryUnited States of America

Current Endorsements

A PDF of the forms are available by selecting the



You may also search for a form by entering the form number in the search Endorsement field.

You can remove a form by simply select the Remove button.

If you are unsure of the correct form numbers to be used, please contact the Underwriting department.

Current Endorsements							
				Filter by Details...	Filter by Category...	Search Endorsements...	Search Clear
Form Code	Id	Edition	Description	Category		Premium	
LS-12	31	08/12	Waiver of Subrogation ⓘ	N/A		\$0.00	✕ Remove
Name of Person or Organization:				EQUIPMENTSHARE.COM INC			
LS-141A-DISC	26	06/22	Policyholder Disclosure Notice: Employer's Liability Exclusion Third Party Action Over ⓘ	N/A		\$0.00	
LS-141A	25	06/22	Employer's Liability Exclusion ⓘ	N/A		\$0.00	
LS-139A	24	06/22	Communicable Disease Exclusion Clarification ⓘ	N/A		\$0.00	
LS-93	23	05/97	Employment Practices Exclusion ⓘ	N/A		\$0.00	
LS-88	22	05/97	Discrimination Clarification ⓘ	N/A		\$0.00	

Available Endorsements

Adding Endorsements.

Select the form, then
Select Add Selected
Endorsements. **Make
sure you have selected
Add and not just checked
the box.**

The form will then move
under Current
Endorsements

If a form requires
information, the entry
field will be yellow. All
fields that are yellow will
need to be completed.

Available Endorsements							
+ Add Selected Endorsements				Filter by Category...	Search Endorsements...	Search	Clear
	Form Code	Edition	Description	Category	Add	Allowed	Info. Required
☐	THIRD-PARTY	2.0	Third-Party Notification Program ⓘ	N/A	1	1	✓
☐	LS-23	01/88	Additional Insured (Club Members) ⓘ	N/A	1	99	
☒	LS-25A	05/17	Additional Insured State or Political Subdivision ⓘ	N/A	1	99	✓

Current Endorsements							
				Filter by Details...	Filter by Category...	Search Endorsements...	Search Clear
	Form Code	Id	Edition	Description	Category	Premium	
▲	LS-25A	37	05/17	Additional Insured State or Political Subdivision ⓘ	N/A	\$0.00	✕ Remove
				State or Political Subdivision:			

Attaching Documents

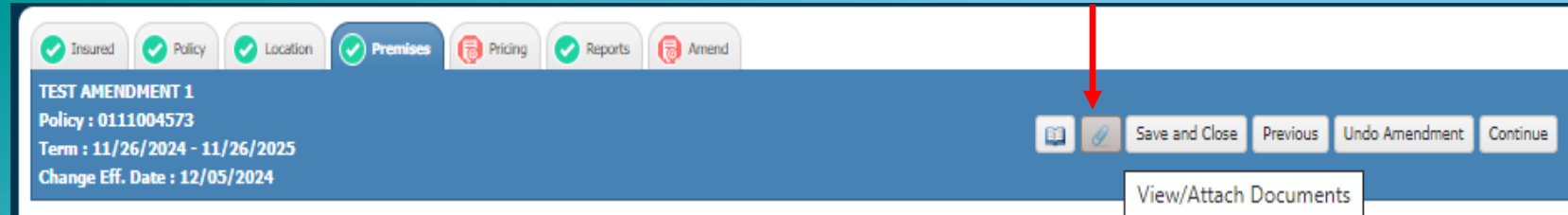
To attach documents to support endorsement changes.

Select the paper clip icon.

Once selected you will get the Document Library.

Select from the Document Type dropdown menu what you are attaching.

Select the Date Uploaded.

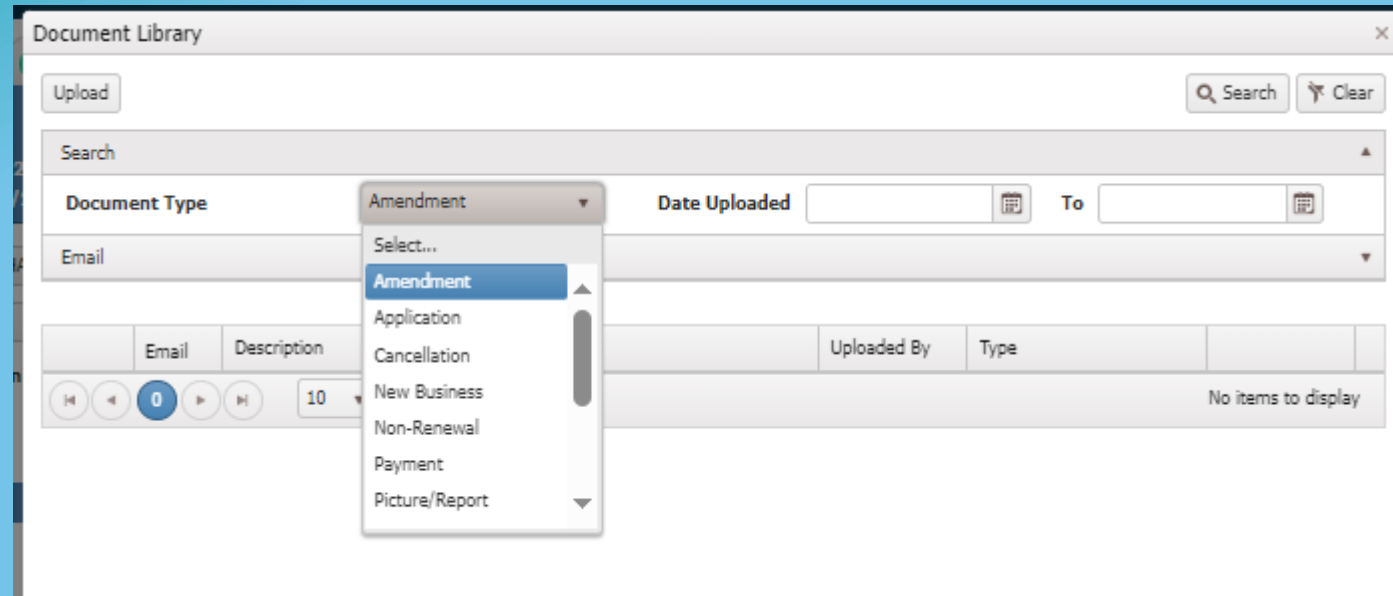


Insured Policy Location Premises Pricing Reports Amend

TEST AMENDMENT 1
Policy : 0111004573
Term : 11/26/2024 - 11/26/2025
Change Eff. Date : 12/05/2024

View/Attach Documents

Save and Close Previous Undo Amendment Continue



Document Library

Upload Search Clear

Search

Document Type Amendment Date Uploaded To

Email

Amendment

Application

Cancellation

New Business

Non-Renewal

Payment

Picture/Report

Email Description

Uploaded By Type

No items to display

Attaching Documents

Select Underwriting from the Dropdown
Select Picture/Report from the dropdown

Drag and Drop your PDF document into
the red wording area.

In the Description field, type what you are
attaching.

Save and “x” out.

The screenshot shows a web form titled "Upload" with a blue header bar containing "Save" and "Close" buttons. The form includes several dropdown menus: "Categorizers" with two instances set to "Underwriting", and "Default Categorizer 3" set to "Picture/Report". Below these is a "Select files..." button and a red warning message: "The following characters will be replaced within the filename: ? % * : | \" < > ' ~ ! @ # \$ % ^ &". The "File Name" field displays "dog.pdf". The "Categorizer 3" dropdown is set to "Picture/Report" with a checked "Use default" option. The "Description" field contains the text "Dog questionnaire".

Upload ✓ Save ✕ Close

Categorizers: Underwriting Underwriting

Default Categorizer 3: Picture/Report

16761 / 0111004573

Select files... **The following characters will be replaced within the filename: ? % * : | \" < > ' ~ ! @ # \$ % ^ &**

File Name: dog.pdf ✕

Categorizer 3: Picture/Report ☒ Use default

Description

Dog questionnaire

Once you are done making your changes, review the Navigation Tabs at the top.



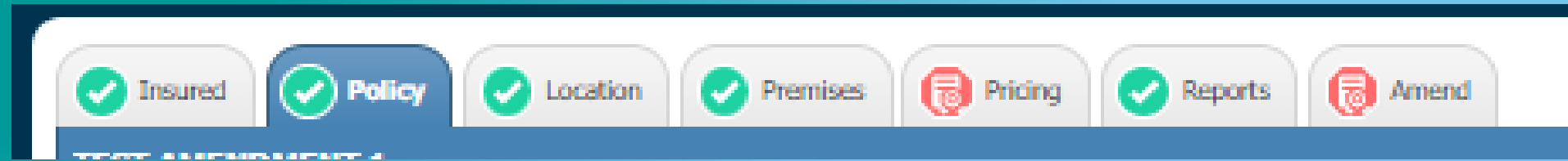
Green Checkmark: No more work is required for that screen

Red Dollar Sign: screen is missing required information, or a rule is preventing rating or application submission.

Orange Silhouette: Underwriter Referral is triggered by a rule that is related to that screen

Pricing

Make any changes needed to make all Tabs **Green** except the Pricing Tab and the Amend Tab.



Select the Pricing tab.
This will show the new
Premium amount for
the endorsement
submitted

The screenshot displays the 'Pricing' tab interface. At the top, there is a navigation bar with tabs: 'Insured', 'Policy', 'Location', 'Premises', 'Pricing' (selected), 'Reports', and 'Amend'. Below the navigation bar, a blue header bar contains the text 'TEST AMENDMENT 1', 'Policy : 0111004573', 'Term : 11/26/2024 - 11/26/2025', and 'Change Eff. Date : 12/05/2024'. To the right of this header are buttons: 'Save and Close', 'Previous', 'Undo Amendment', and 'Continue'. Below the header, there is a 'Refresh Rate' button. The main content area shows the 'Total Premium:' as '\$1,289.93'. Below this is a table with the following data:

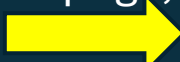
Description	Premium
Coverage A - Building Premium	\$1,269.00
Asbestos Exclusion	(\$1.00)
Silica Exclusion	(\$1.00)
Equipment Breakdown Enhancement Endorsement	\$40.00
Loss Of Income Special Limitations	(\$25.00)
Fire Fee Premium	\$7.93

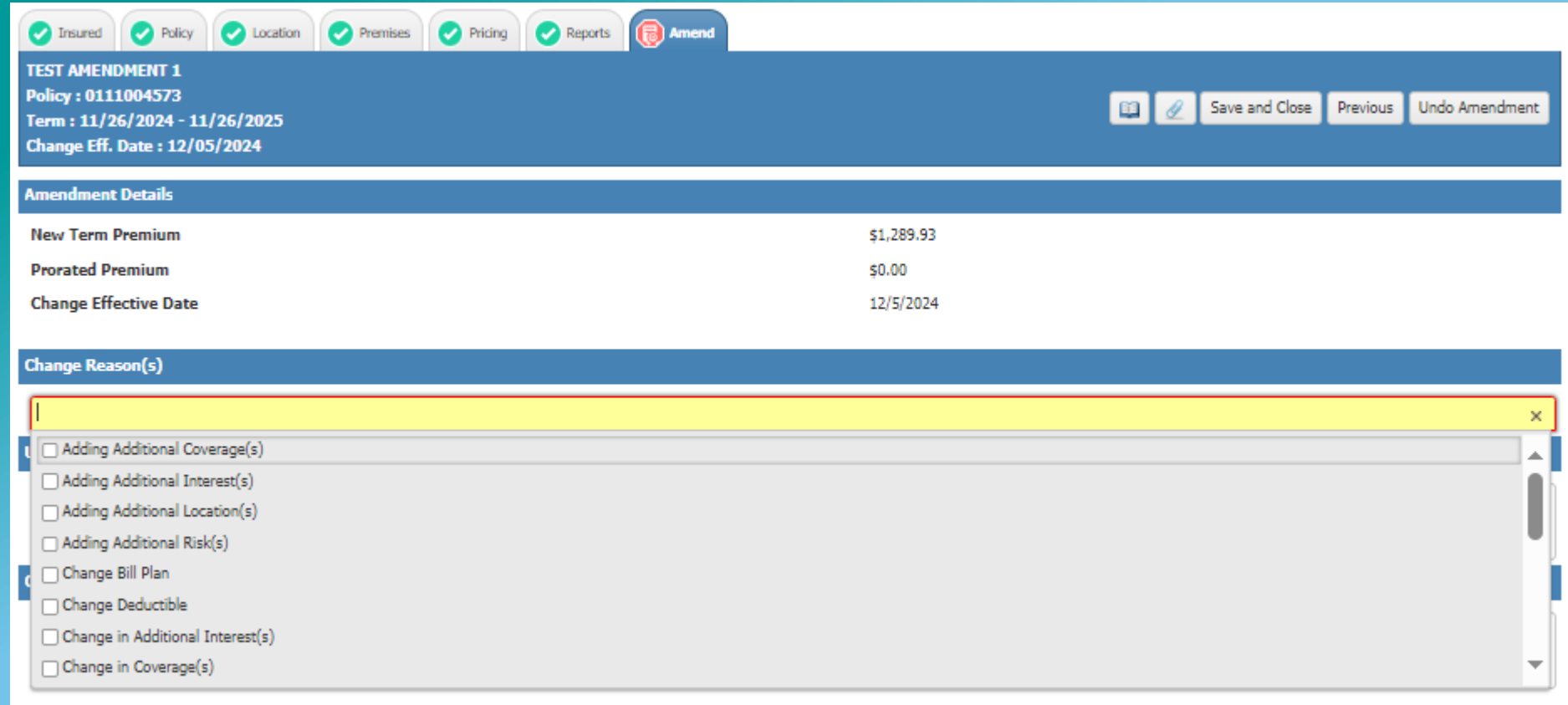
At the bottom of the interface, there are buttons: 'Save and Close', 'Previous', 'Undo Amendment', and 'Continue'.

Entering Change Reasons

Select the Amend Tab

Select from the dropdown menu what change has been made. Multiple Reasons can be selected. This reason code may get changed if the wrong one is selected when we review the Endorsement.

The Change Reason will show on the Dec page, as seen here. 



Declaration Type: Amendment

Amendment Effective Date: 12/03/2024

Description of Change: **Adding Additional Coverage(s)**

Continuing with the Change reason page...

Next you will select a more detailed description of the change.

User Change Made field should be to be filled in. This helps with what specifically was done. This may not be available due to programming.



Whatever you put in this area will show on the Dec page, as seen here.

NOTE: This is **NOT** where you put your change explanations.

The screenshot shows a web application interface for managing policy amendments. At the top, there is a navigation bar with tabs: 'Insured', 'Policy', 'Location', 'Premises', 'Pricing', 'Reports', and 'Amend' (which is active and highlighted in blue). Below the navigation bar, the header section contains the text 'TEST AMENDMENT 1', 'Policy : 0111004573', 'Term : 11/26/2024 - 11/26/2025', and 'Change Eff. Date : 12/05/2024'. To the right of this header are four buttons: 'Save and Close', 'Previous', 'Undo Amendment', and 'Submit Referral'. The main content area is divided into three sections: 'Amendment Details', 'Change Reason(s)', and 'User Changes Made'. The 'Amendment Details' section contains a table with three rows: 'New Term Premium' with a value of '\$1,289.93', 'Prorated Premium' with a value of '\$0.00', and 'Change Effective Date' with a value of '12/5/2024'. The 'Change Reason(s)' section contains a single row with the text 'Adding Additional Coverage(s)' and a close button 'X'. The 'User Changes Made' section contains a single row with the text 'SMIC- SF-532 ADDED Classification Contractor NOC'.

Finally, time to submit your Endorsement Referral.

Select the Submit Referral button.

Once selected you will receive this box. This is where you are to put any notes regarding the change request.

THIS MUST HAVE THE EXPLANATION OF THE CHANGE

Select OK –Referral has been submitted.
Select Ok one more.

Submitting Referral

Insured Policy Location Premises Pricing Reports Amend

TEST AMENDMENT 1
Policy : 0111004573
Term : 11/26/2024 - 11/26/2025
Change Eff. Date : 12/05/2024

Save and Close Previous Undo Amendment **Submit Referral**

Amendment Details

New Term Premium	\$1,289.93
Prorated Premium	\$0.00
Change Effective Date	12/5/2024

Change Reason(s)

Adding Additional Coverage(s) X

User Changes Made

SMIC- SF-532 ADDED Classification Contractor NOC

12/5/2024

SubmitReferral X

Please provide any comments to the underwriter

Add additional coverage

Insured is now doing snow removal part time
please add snow removal coverage.

OK Cancel

Message X

Referral has been Submitted

Ok

You have now successfully submitted an
Endorsement by a Task or by a Referral.

Thank you.

Should you have any questions, please contact
your Territory Manager, Underwriting or
Endorsement Department.