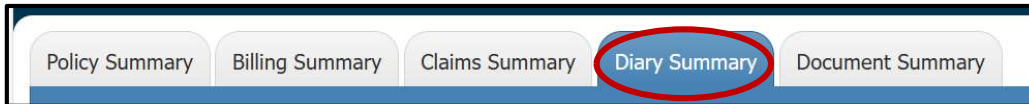
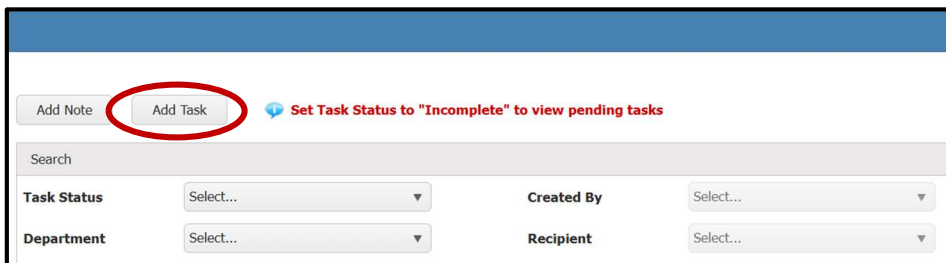


How To Submit an Endorsement Task

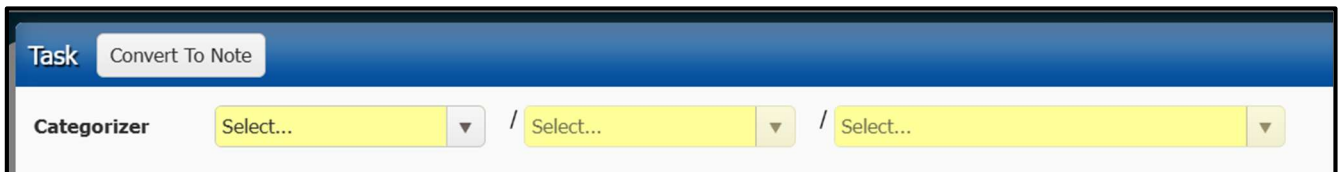
Pull up the active policy in Finys and select the Diary Summary Tab



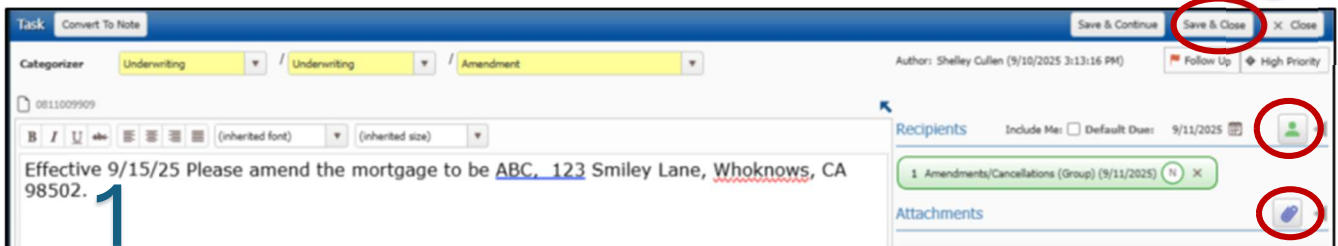
Select “Add Task”



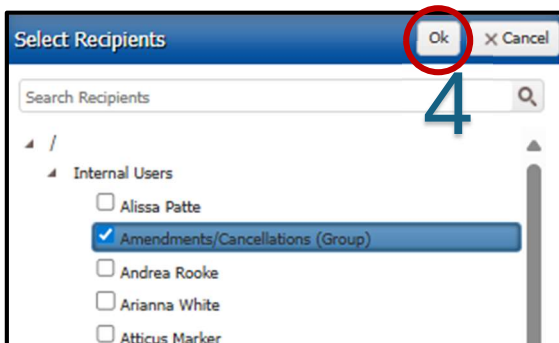
From the categorizer drop down menus, select: Underwriting/Underwriting/Amendment



In the Description area, write a detailed description of the change (1)



Select the green person icon to select the recipient (2), For endorsements, please select “Amendments/Cancellations (Group)” (3), then click “ok” (4)



To upload documents click the paperclip icon (5)

3 Lastly, click save and close (6)

How To Process an Endorsement by Referral

Pull up the active policy in Finys and click the “Amend” button for the correct term:

The screenshot shows the 'Policy Summary' tab for a policy titled 'TEST AMENDMENT 1'. The account number is 1003062 and the policy number is 0111004573. The policy is active and renewable. The 'Paid In Full' section shows 'Nothing Due'. The 'Payment History' shows 1 payment in the last 30 days. The 'Last Payment' was \$1,289.93 on November 26, 2024. Below this, there is a table with columns: Term, Effective, Expiration, Premium, and Action. The first row shows Term 1, Effective 11/26/2024, Expiration 11/26/2025, Premium \$1,289.93, and Action 'Amend'. The 'Amend' button is highlighted with a red box. Below the table, there is a 'Change' section with columns: Change, Effective, Date, and Term Premium. The first row shows Change 'NEW BUSINESS', Effective 11/26/2024, Date 11/26/2024 3:57 PM, and Term Premium \$1,289.93. There are 'Select' and 'Inquire' buttons for this change.

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

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

Enter the effective date of the change and click confirm:

The 'Effective Date' dialog box has a label 'Effective Date' and a text input field with a yellow background. To the right of the input field is a calendar icon. Below the input field is a 'Confirm' button.

The policy will now be “unlocked” and look similar to quick quote mode. Make the desired change on the appropriate tab:

The screenshot shows a row of tabs: 'Insured' (with a green checkmark icon), 'Policy' (with a red dollar sign icon and highlighted in blue), 'Location' (with an orange person icon), 'Dwelling' (with an orange house icon), 'Pricing' (with a red dollar sign icon), and 'Reports' (with a green checkmark icon).

Click the “Document” button to upload any needed documentation:

The screenshot shows a blue bar with six buttons: 'Document' (with a document icon), 'Save and Close', 'Undo Amendment', 'Continue', and 'Deny Referral'.

An upload box will open; select “underwriting” for the first two Categorizers and “Picture/Report” for “Default Categorizer 3”:

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

Add a description of the document

Click the Pricing tab to re-rate the policy

Insured

Policy

Location

Premium

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

Continue

Refresh Rate

Total Premium:

\$1,289.93

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

Save and Close

Previous

Undo Amendment

Continue

Click the Pricing tab to re-rate the policy

Click the Amend tab (1) and select the correct reason from the “change reason” drop down menu (2) , then write a detailed explanation in the “user changes made” section (3) (this description will appear on the declarations). Lastly, click “submit referral (4):

The screenshot shows a software interface for creating an amendment. At the top, a navigation bar contains several tabs: Insured, Policy, Location, Premises, Pricing, Reports, and Amend. The 'Amend' tab is highlighted with a red circle and labeled with a red '1'. Below the navigation bar, the form title is 'TEST AMENDMENT 1'. It includes fields for 'Policy : 0111004573', 'Term : 11/26/2024 - 11/26/2025', and 'Change Eff. Date : 12/05/2024'. On the right side of the form, there are buttons: 'Save and Close', 'Previous', 'Undo Amendment', and 'Submit Referral'. The 'Submit Referral' button is circled in red and labeled with a red '4'. Below the header, there is a section titled 'Amendment Details' with a table showing 'New Term Premium' as \$1,289.93, 'Prorated Premium' as \$0.00, and 'Change Effective Date' as 12/5/2024. Below this is a 'Change Reason(s)' section with a dropdown menu showing 'Adding Additional Coverage(s)', which is labeled with a red '2'. At the bottom is a 'User Changes Made' section with a text area containing 'SMIC- SF-532 ADDED Classification Contractor NOC', labeled with a red '3'.

Another box will open, type an explanation for the change, or any notes to the endorsement team and click OK:

The screenshot shows a 'SubmitReferral' dialog box. It has a title bar with 'SubmitReferral' and a close button. The main text says 'Please provide any comments to the underwriter'. Below this is a text area containing the text 'Add additional coverage' and 'Insured is now doing snow removal part time please add snow removal coverage.'. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

If the referral was accepted, the following box will appear, click okay again:

The screenshot shows a 'Message' dialog box. It has a title bar with 'Message' and a close button. The main text says 'Referral has been Submitted'. At the bottom of the dialog is an 'Ok' button.