SECURITY MUTUAL GROUP

## How To Submit an Endorsement Task

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

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

Select "Add Task"

Add Note | Add Task | 💬 **Set Task Status to "Incomplete" to view pending tasks**

Search

| Task Status | Select... ▼ | Created By | Select... ▼ |
| Department | Select... ▼ | Recipient | Select... ▼ |
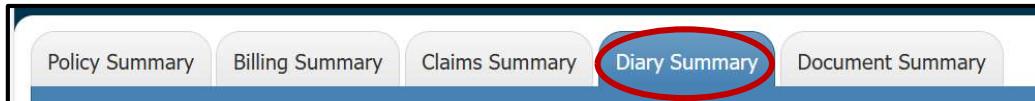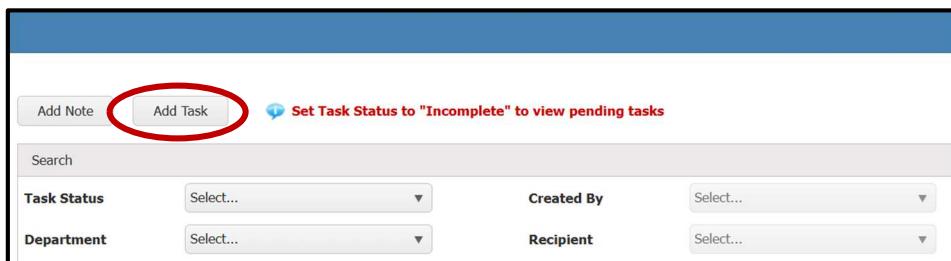
From the categorizer drop down menus, select: Underwriting/Underwriting/Amendment

Task | Convert To Note

Categorizer | Select... ▼ / Select... ▼ / Select... ▼

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

6

Task | Convert To Note | Save & Continue | Save & Close | X Close

Categorizer | Underwriting ▼ / Underwriting ▼ / Amendment ▼ | Author: Shelley Cullen (9/10/2025 3:13:16 PM) | 🚩 Follow Up | ◆ High Priority

0811009909

B I U ... | (inherited font) ▼ | (inherited size) ▼ | Recipients | Include Me: ☐ Default Due: 9/11/2025 📅 | **2**

Effective 9/15/25 Please amend the mortgage to be ABC, 123 Smiley Lane, Whoknows, CA 98502. | 1 Amendments/Cancellations (Group) (9/11/2025) Ⓝ X

1 | Attachments | **5**

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

Select Recipients | Ok | X Cancel

Search Recipients 🔍

4

◢ /
  ◢ Internal Users
    ☐ Alissa Patte
    ☑ Amendments/Cancellations (Group)
    ☐ Andrea Rooke
    ☐ Arianna White
    ☐ Atticus Marker

3
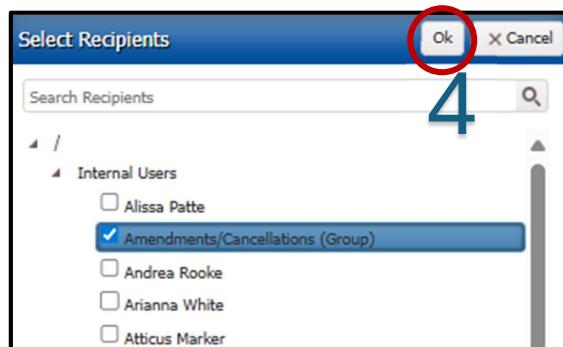
To upload documents click the paperclip icon (5)

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:

Enter the effective date of the change and click confirm:

The policy will now be "unlocked" and look similar to quick quote mode. Make the desired change on the appropriate tab:
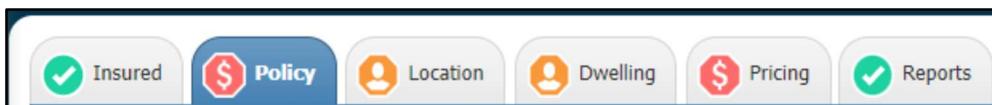
Click the "Document" button to upload any needed documentation:

An upload box will open; select "underwriting" for the first two Categorizers and "Picture/Report" for "Default Categorizer 3":
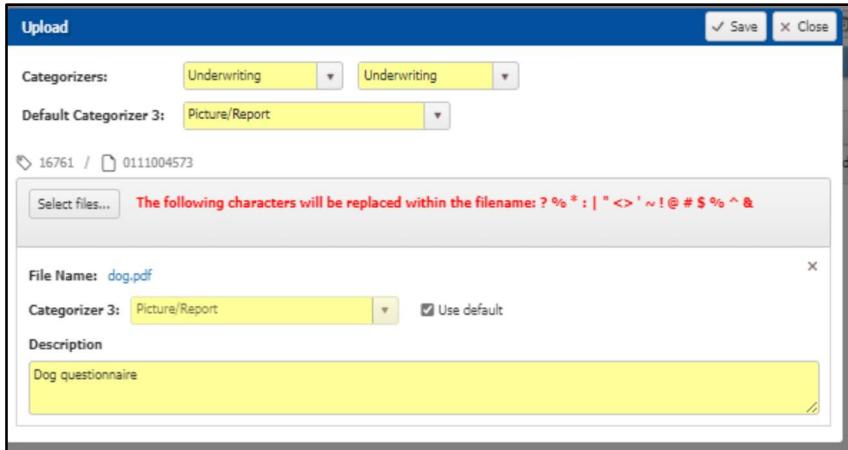
Add a description of the document

Click the Pricing tab to re-rate the policy
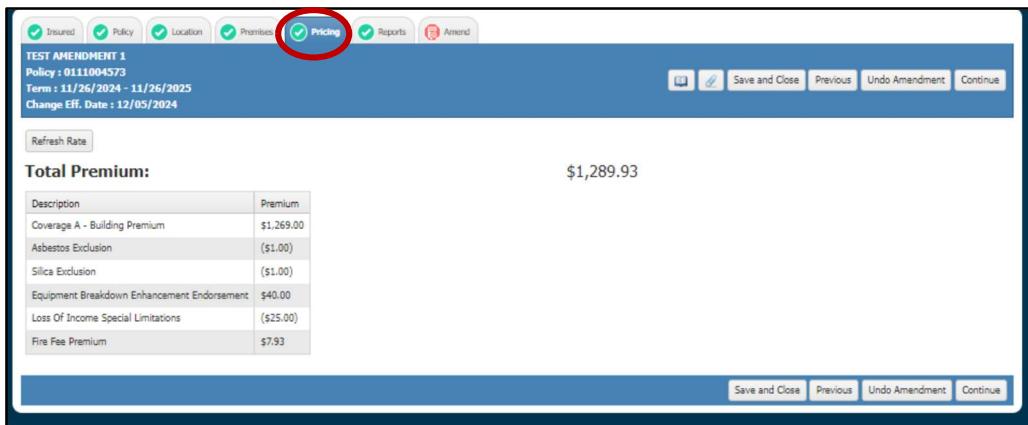
Click the Amend tab (1) and select the correct reason from the "change reason" drop down menu (2) , then write a detailed explanation in the "user changes made" section (3) (this description will appear on the declarations). Lastly, click "submit referral (4):
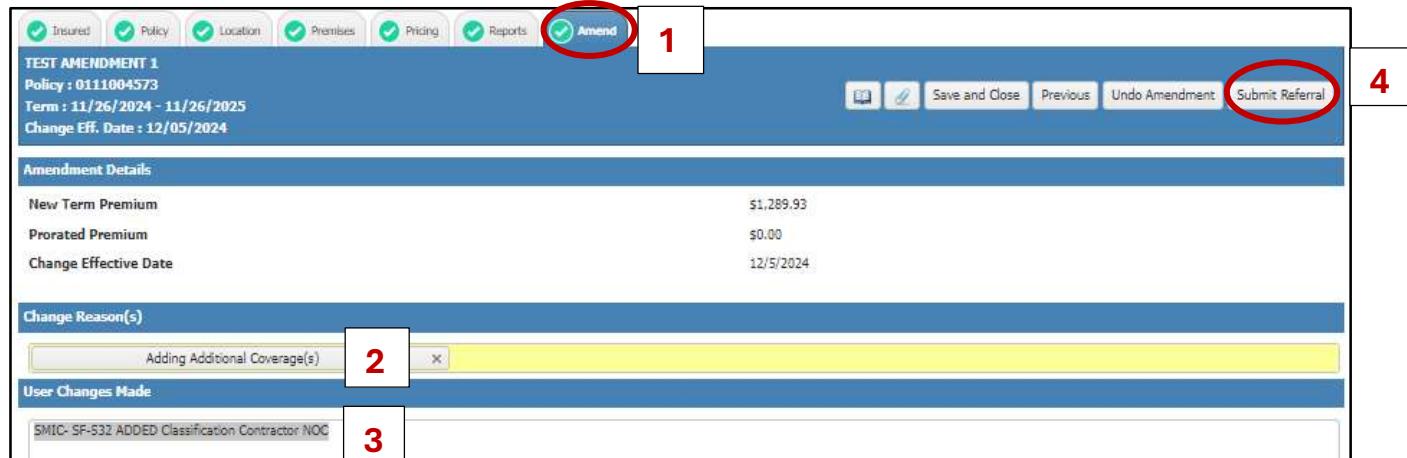
Another box will open, type an exlplanation for the change, or any notes to the endorsement team and click OK:
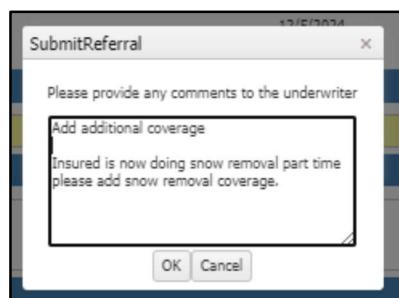
If the referral was accepted, the following box will appear, click okay again: