



## Finys Suite

How to, Tips, Reminders & More!

Check your Finys dashboard every day!

*\*Scroll Down To The Bottom\**



**The Finys Dashboard** Once you log into the Finys Suite, the dashboard is the first screen you see.

### • OPEN TASKS

- Referrals that you have submitted to **Underwriting** will be available in the Open Task Box, for your review from Underwriting once accepted.

*\*After the referral is reviewed and accepted, please note that if you make any changes, a new referral will need to be submitted!\**

### • DOCUMENTS

- New Business
- Renewals
- Amendments
- Non Payment Cancellations

## Submitting Endorsements

Endorsements can be submitted two ways:

1. Select the amend tab within the policy.
  - a. Please explain the changes you made in the Submit Referral Box.
2. Select the Diary Icon within the policy, Add a Task and submit your request. Please explain the changes you made in the message section.

*\*Please allow 7-10 business days for processing requests.\**

*\*Please check your dashboard for the amended declaration page.\**

*\*Please check your dashboard for a response from Underwriting if more information is needed.\**

## Billing Change Requests

Please send all billing change requests to [directbill@securitymutual.com](mailto:directbill@securitymutual.com)

This includes:

- EFT changes & Enrollment Forms.
- Pay Plan Changes

### Pay Plans Include:

- Annual 1 Pay
- 2-Pay: 60% Down Payment
- 3-Pay: 40% Down Payment
- Quarterly: 40% Down Payment
- 6-Pay: 25% Down Payment
- 9-Pay: 25% Down Payment

**\$6.00 Billing Fee on all pay plans, unless the policy is set up for auto pay.**

## Quoting

- When you complete a quote in Finys, you must **SAVE and CLOSE** it otherwise, it will lock the quote and Underwriting cannot review it.

## Quotes On Existing Policies

You can turn an existing policy into a quote by using the amend tab. You can then make any changes and receive a revised quote in the reports tab. You don't have to submit the request until you are ready to move forward with changes.

*\*Be sure to undo amendment afterwards\**

## Document Tab

- Documents and photos can be uploaded to the Finys quote/policy via the document tab prior to submission.

## Quote To Issue

To issue a policy, change quick quote mode to application mode.

Continue completing Underwriting Questions, add payment, then submit.

*\*Be sure to print the application from the reports tab and keep the signed application in your office.\**

## Mortgagee Bill Policies:

- Enter the Mortgagee under the Dwelling Tab for HO/LLP and Premises Tab for BOP.
- For Mortgagee Billed Policies- Chose First Mortgagee-Payor.

*\*If mortgagee does not show, use the Save & Close Box to enter mortgagee details.\**

## Auto Pay-EFT Enrollment

- The EFT Authorization form must be completed, attached, and uploaded to the Finys policy via the document tab before the policy can be issued.

## Claim Reporting

- Please submit claims for Finys policies via the Finys system, choose submit a claim on the landing page.
- If the policy is still located in Agent Xpress, please email [claims@securitymutual.com](mailto:claims@securitymutual.com).
- How do you tell if a policy is in Finys or Agent Xpress?
  - If the policy is in Finys, policy number is all numbers.
  - If the policy is in Agent Xpress, policy number is letters & numbers.

## System Credentials

- If you need credentials, a password reset, or if someone needs to upgrade to have management access for Finys, please contact [password@securitymutual.com](mailto:password@securitymutual.com)
  - A profile sheet is needed to add, remove, or add management access.
  - Please remember to set your security questions and answers for a successful password reset in the future if needed.
- If you need credentials or a password for the main website; [securitymutual.com](http://securitymutual.com), this request must go to your Agency Admin.

## Website

The [securitymutual.com](http://securitymutual.com) website is designed to provide you with the most up to date information including:

- Resource Library, which includes Finys training.
- Questionnaires
- Product Information
- Agent Communications
- And More!

**Contacts**

Underwriting: [underwriting@securitymutual.com](mailto:underwriting@securitymutual.com)  
Endorsements: [endorsements@securitymutual.com](mailto:endorsements@securitymutual.com)  
Cancellations: [cancellations@securitymutual.com](mailto:cancellations@securitymutual.com)  
Claims: [claims@securitymutual.com](mailto:claims@securitymutual.com)  
Direct Bill: [directbill@securitymutual.com](mailto:directbill@securitymutual.com)  
Office: 607-257-5000

**Commercial Underwriting**

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