



DISTINGUISHED
SELF-SERVICE

The Broker Portal **ENDORSEMENTS GUIDE**





Processing Endorsements on the Portal

You can submit endorsement requests through the Broker Portal. Several endorsement types can be instantly processed and applied to your account(s). Others will be sent to the appropriate team for expedited review.

Follow the steps below to process an endorsement or update the policy's point of contact on the Broker Portal.

- 1 Log in to the **Broker Portal**.
- 2 Go to the Broker Portal **Dashboard**.

DASHBOARD

We've made many new improvements within the portal, ranging from changes to help you submit business faster to creating channels to collect your feedback. [Learn more by clicking here to visit the Release Notes page.](#)

SUBMISSIONS	RENEWALS	ENDORSEMENTS	PAYMENT DUE	QUOTES	IN FORCE POLICIES
1675	224	129	0	127	571

ALL SUBMISSIONS

Named Insured	Reference #	Line Of Business	Effective Date	Expiration Date	Date Submitted	Balance	Contact	Display Status	Actions
Cheney, Inc.	1000000000	Umbrella	04/28/17	04/28/2018	04/14/17		Michael Hadden	Quoted	Edit Bind Other
Cheney, Inc.	1000000000	Directors & Officers	04/28/17	04/28/2018	04/14/17		Michael Hadden	Incomplete	Edit Close File

- 3 Click the magnifying glass to search for your **Submission** or **Policy**.

DISTINGUISHED PROGRAMS

DASHBOARD REPORTS I NEED TO... RECENTLY VIEWED HELP

SEARCH FOR AN ITEM

Named Insured	Policy Number	Line Of Business	Effective Date	Status	Submission Date	Brokerage	Description
Brick & Brownstone	1000000000	CAP	Mar 1 2018 12:00AM	InForce	Mar 1 2018 11:00AM	1000000000	100

ALL IN FORCE POLICIES

Named Insured	Reference #	Line Of Business	Effective Date	Expiration Date	Date Submitted	Underwriter	Display Status	Actions
Brick & Brownstone	1000000000	Brick & Brownstone	02/26/18	02/26/2019	02/26/18	Michael Hadden	InForce	Endorse View Close File



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- 4 Click **New Endorsement** and select **Endorse**.

The screenshot shows the 'POLICY: INFORCE' header. Below it, there's a 'NEW ENDORSEMENT' button with a plus icon, which is highlighted with a red box. To the right of this button is an 'Endorse' button. Further right, there are links for 'TRANSACTIONS (1)', 'ALL DOCUMENTS (1)', and 'NOTES (1)'. The background is a light blue and white color scheme.

- 5 Select **Endorsement Type**.

- The Endorsement Types listed will allow you to make changes instantly on the account.
- If **Other** is selected from the dropdown menu, choose the **Endorsement Transaction Sub-type**. Your endorsement request will be sent to our team for expedited review and processing.

The screenshot shows the 'POLICY: INFORCE' header. Below it, there's a 'NEW ENDORSEMENT' button with a plus icon. To the right of this button is a dropdown menu for 'Endorsement Type' which is open, showing options: '(Select)', 'Mailing Address', 'Broker Contact', and 'Other'. The 'Effective Date' is set to '4/27/2018'. There are 'ADD ENDORSEMENT', 'OK', and 'CANCEL' buttons. To the right, there are links for 'TRANSACTIONS (1)', 'ALL DOCUMENTS (1)', and 'NOTES (1)'. The background is a light blue and white color scheme.

- 6 **Complete** your change or request.

- Update the information and click **Automated Bind & Issue**, when available. Your endorsement will be completed, and a confirmation will be emailed to you.
- For **Other** endorsement requests, confirm the **Effective Date** and include details of the change for the underwriter. **Submit** the endorsement for review. You will see an on-screen confirmation and receive an email receipt.
- Please be advised that coverage cannot be considered amended until written confirmation is received from our office. If you do not receive correspondence from our office within 48 hours, please contact us.

The screenshot shows the 'POLICY: INFORCE' header. Below it, there's a 'BIND ENDORSEMENT' button with a plus icon, which is highlighted with a red box. To the right of this button is a 'MORE ACTIONS' button. Below these buttons, there's a table with columns for 'Broker', 'Insured', 'Umbrella', and 'Additional Interest', each with a checkmark. The background is a light blue and white color scheme.

The screenshot shows the 'POLICY: INFORCE' header. Below it, there's a 'SUBMIT FOR REVIEW' button with a plus icon, which is highlighted with a red box. To the right of this button is a 'MORE ACTIONS' button. Below these buttons, there's a table with columns for 'Broker', 'Insured', 'Umbrella', 'Additional Interest', 'Endorsement', 'Pricing and Options', and 'Endorsement Type'. The 'Endorsement Type' is set to 'Other'. There's a text box for 'Please Describe the endorsement you would like to do on this policy. Please increase limit from \$10,000,000 to \$15,000,000'. The background is a light blue and white color scheme.