



YOUR HANDY GUIDE TO
ENDORSEMENTS ON
THE BROKER PORTAL

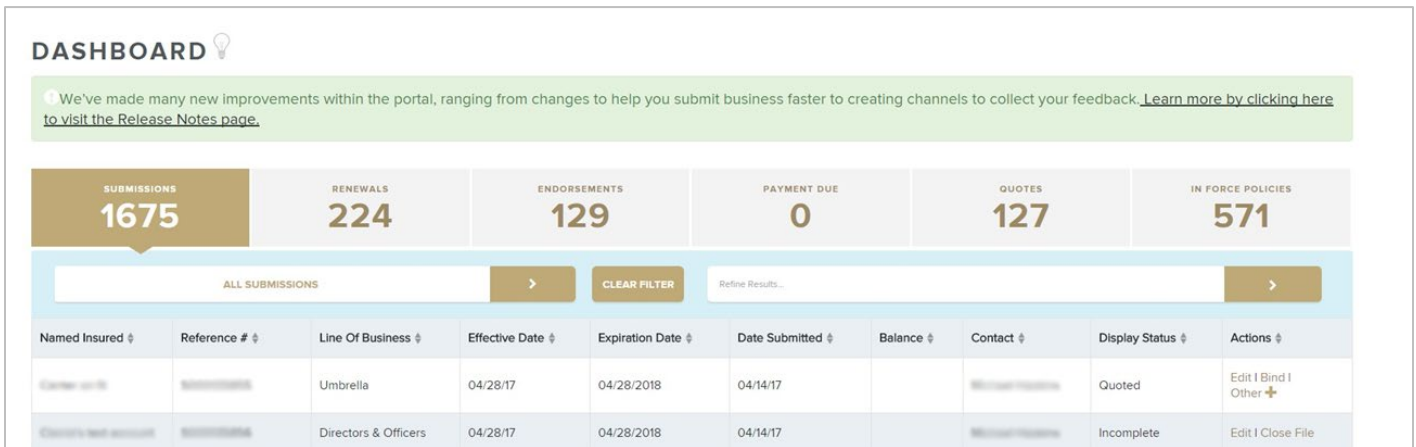



DISTINGUISHED
SELF-SERVICE

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 

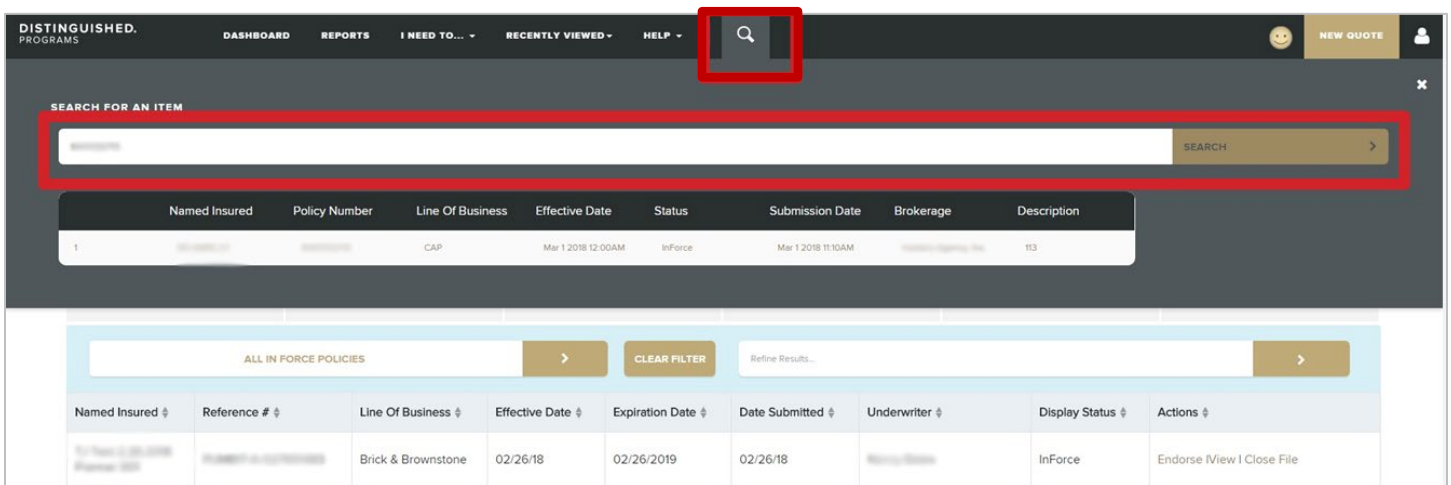
We've made many new improvements within the portal, ranging from changes to help you submit business faster to creating channels to collect your feedback. [Learn more by clicking here to visit the Release Notes page.](#)


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

ALL SUBMISSIONS CLEAR FILTER Refine Results...

Named Insured	Reference #	Line Of Business	Effective Date	Expiration Date	Date Submitted	Balance	Contact	Display Status	Actions
...	...	Umbrella	04/28/17	04/28/2018	04/14/17		...	Quoted	Edit Bind Other
...	...	Directors & Officers	04/28/17	04/28/2018	04/14/17		...	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

SEARCH

Named Insured	Policy Number	Line Of Business	Effective Date	Status	Submission Date	Brokerage	Description
1	...	CAP	Mar 1 2018 12:00AM	InForce	Mar 1 2018 11:10AM	...	113

ALL IN FORCE POLICIES CLEAR FILTER Refine Results...

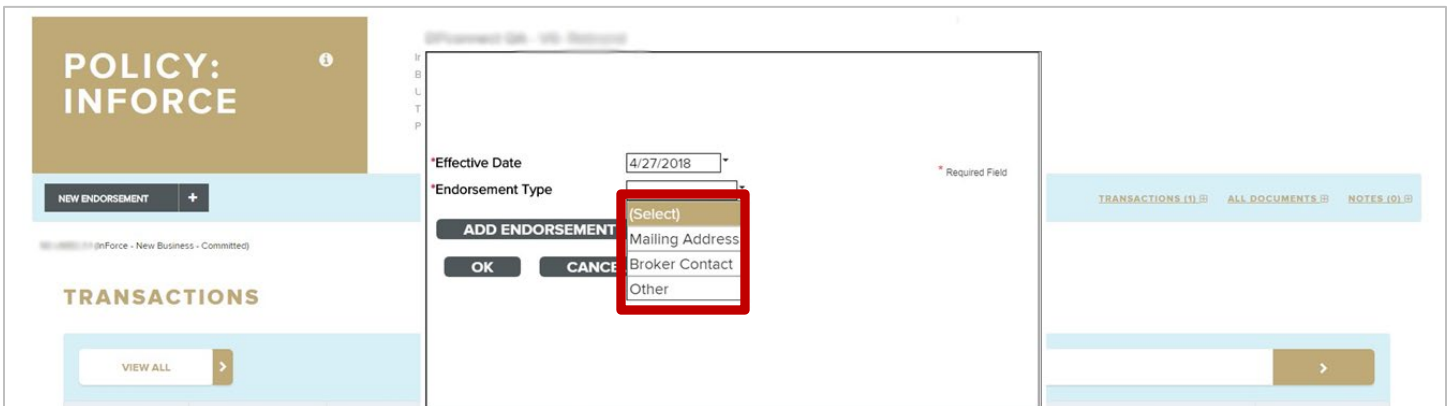
Named Insured	Reference #	Line Of Business	Effective Date	Expiration Date	Date Submitted	Underwriter	Display Status	Actions
...	...	Brick & Brownstone	02/26/18	02/26/2019	02/26/18	...	InForce	Endorse View Close File

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



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.



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.

