Chapter 7

Endorsements

IN THIS CHAPTER

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- Completing the Change and Populating
- Endorsement Status options
- Delivering the Endorsement
- Keeping Track of Endorsements
- Posting the Endorsement

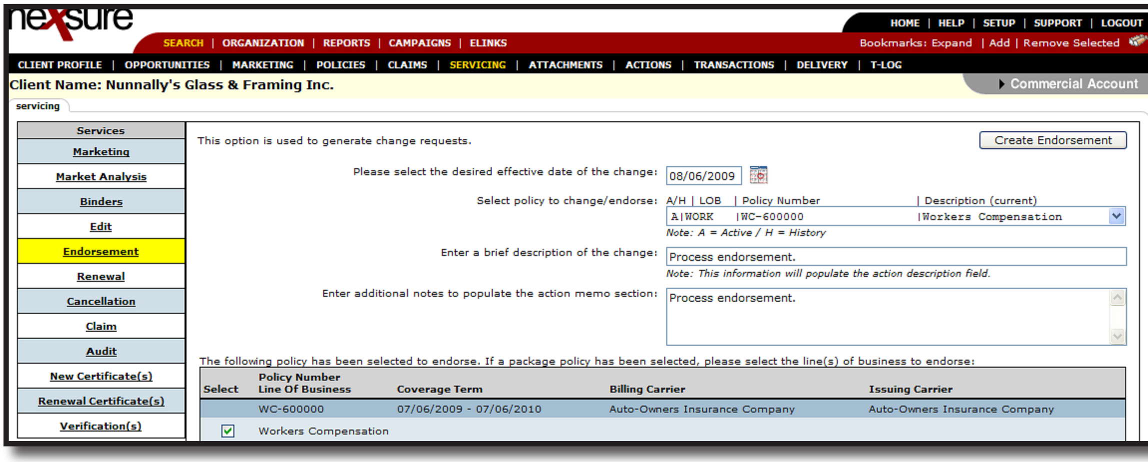
Adding an Endorsement

An Endorsement is an amendment that modifies an insurance policy usually requiring a change request form. The change request form is submitted to the carrier for approval and processing which may or may not result in a premium change. These type of changes in Nexsure are made on the applicable line of business application, populated to the change request form and submitted to the carrier.

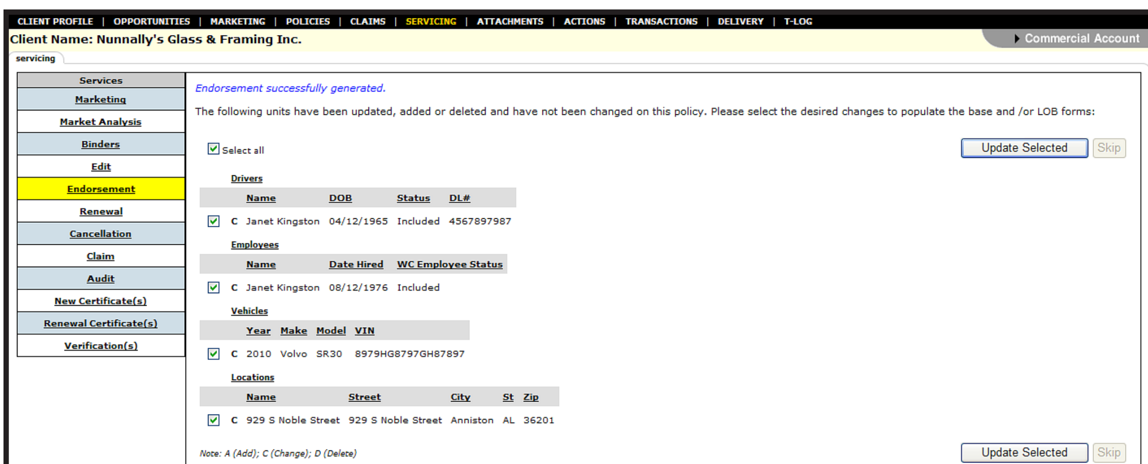
HOW to Add an Endorsement Starting at SERVICING

- Locate the appropriate client through **SEARCH** and click the **SERVICING** link on the **Client** menu.
- Click the **Endorsement** option.
- Enter the effective date of the endorsement in the **Eff Date** field; using the **Calendar** icon or key the date in using the correct formatting. The effective date entered here will not only be used to populate to the coverage term date in the endorsement header but filter the policy selection list by displaying only policies with the correct coverage term. This will help with the policy selection process.
- Next select the policy to be changed by choosing the policy from the drop-down box. An **[H]** indicates a policy in history and an **[A]** indicates that the policy is active.
- The **Description** field will default to **Process Endorsement**. The **Description** and **Memo** fields are used to create the action annotation and are known servicing actions. Servicing actions can be used to document the details of why the service function was performed. Once the description has been entered and the **Tab** key pressed on the keyboard, the **Memo** field is defaulted with the text entered into the **Description** field. The **Memo** field can be used to place more details if needed regarding the change.
- The next step is to select the line of business being changed.

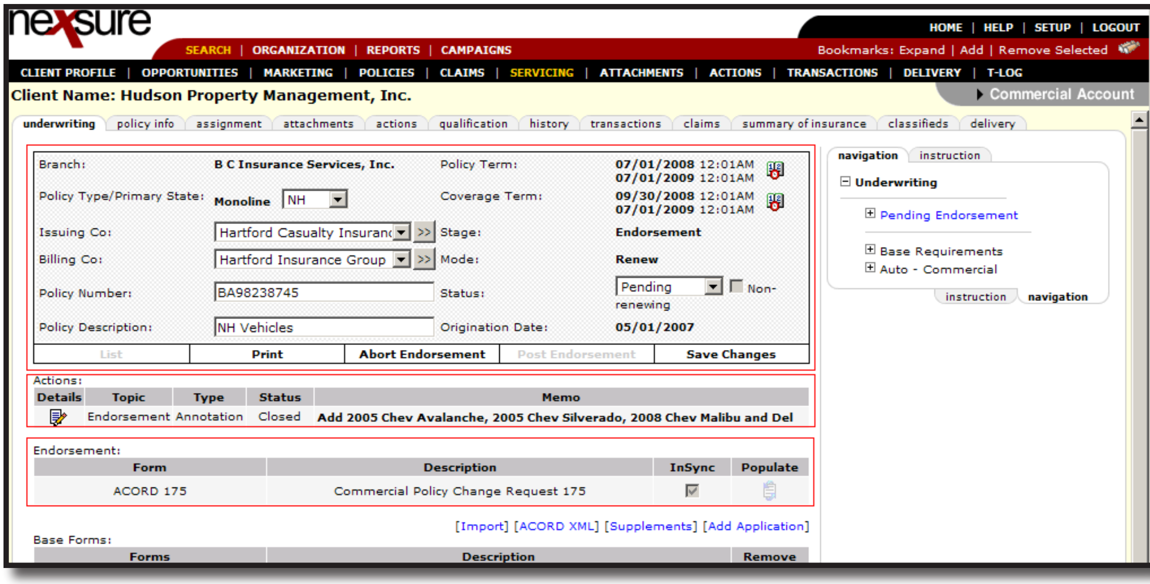
- After selecting the line of business, click the **Create Endorsement** button found in the upper right of the servicing screen.



- If any changes have been made to the units at risk associated to selected forms and have not been updated on the forms, the affected units at risk are presented. These should be selected to ensure that the selected policy record will be updated with the changes and in sync with the units at risk. After selecting, click **Update Selected** to add changes to the record. If none are selected the **Skip** button will be active. Clicking **Skip** will not update the forms with the changes made to the units at risk associated to the form.



- The **underwriting** tab is displayed, with the policy header in a light blue diamond background.
- An **Action** with an open status is created through the servicing process. The status of the action may be changed to **Closed** if a personal follow up for the endorsement is not needed. Nexsure tracks all pending or submitted endorsements for you, with or without a personal follow up.
- Endorsement Change Request form is added to **Forms**.



Note: To endorse a policy using context tools, see *Tips & Facts Vol. 2, Issue 11* in Nexsure Help.

Notes

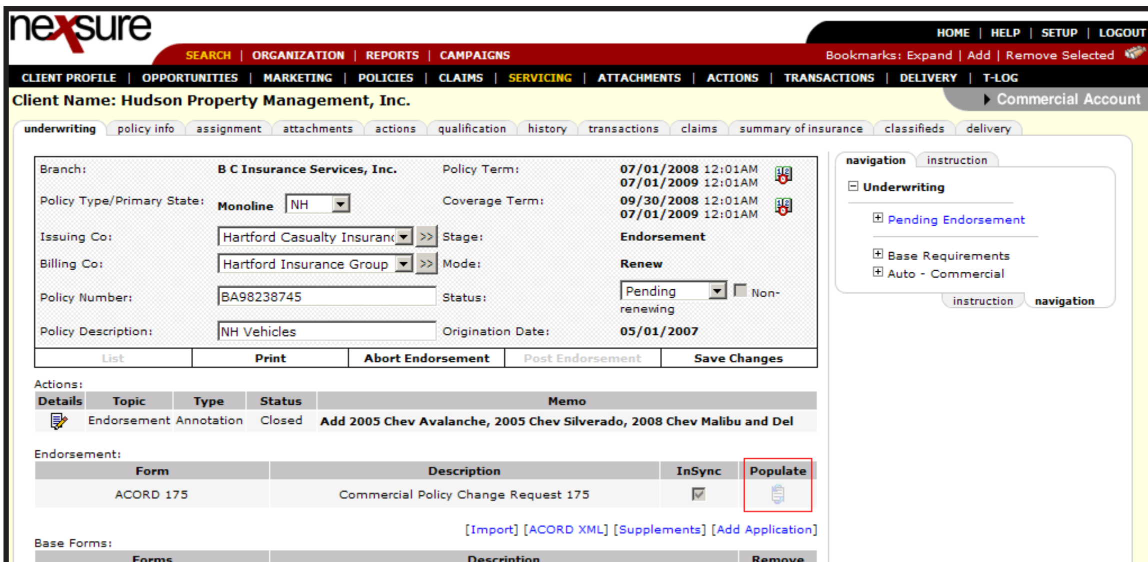
Completing the Change and Populating

The **underwriting** tab displays the policy header with a light blue diamond background. The Action, the Change Request form (applicable to the line of business) and the Line of Business forms will display beneath the policy header. The effective date of the coverage term in the header should reflect the effective date of the endorsement entered on the Servicing screen.

HOW to Make Changes to the Application

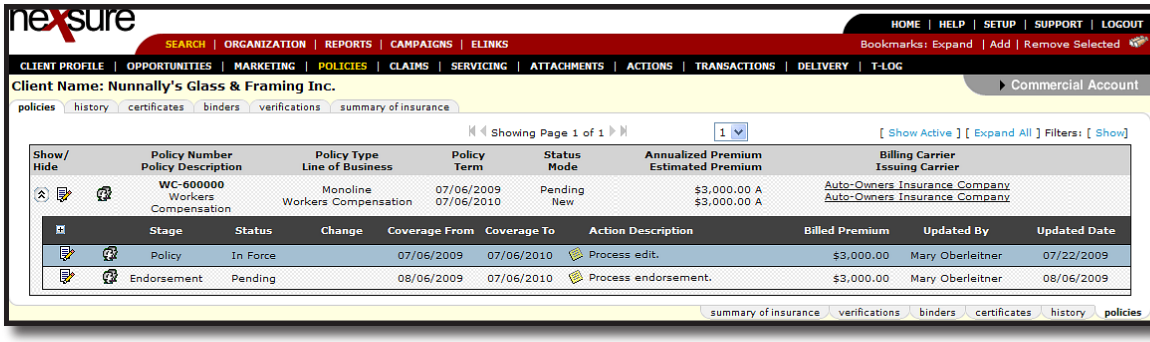
All endorsement changes processed throughout the policy term are done on the appropriate Line of Business form(s) and then populated to the change request. The information contained in the Line of Business form(s) should always be the most current and correct information, as this information populates to other forms.

The **Populate** icon (to the right of the change request form) will not become active until changes are made to the applicable LOB form(s).



The pending endorsement with its light blue diamond background can be accessed from the **ENDORSEMENTS** link on the **Home** menu or from the **POLICIES** link on the **Client** menu.

- From **ENDORSEMENTS** on the **Home** menu, all pending or submitted endorsements which fall within the search criteria are displayed in a summary view. If there is more than one pending or submitted endorsement for a client, each endorsement will have its own **Details** icon.
- From **POLICIES** on the **Client** menu, pending or submitted endorsements display with the In Force policy. Each will have its own **Details** icon.



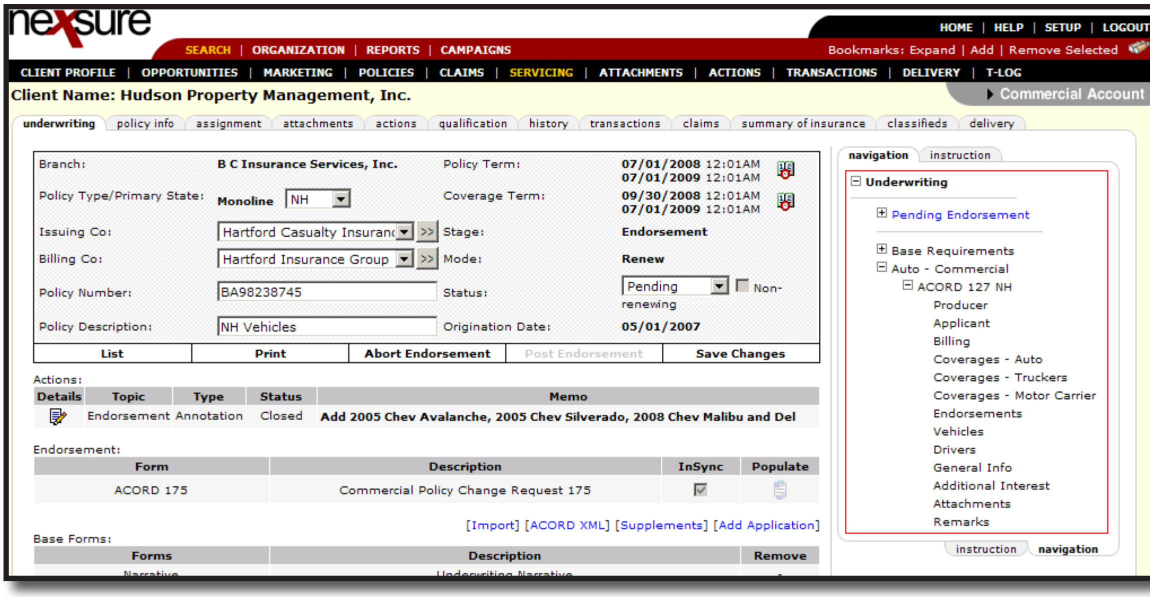
- Click the **Details** icon of the pending endorsement to view the **underwriting** tab if it is not already displayed.

HOW to Make Changes to the Application

All endorsement changes processed throughout the policy term are done on the appropriate Line of Business form(s) and then populated to the change request. The information contained in the Line of Business form(s) should always be the most current and correct information, as this information populates to other forms.

- Click the **ENDORSEMENTS** link on the **Home** menu**.** All unposted endorsements, which fall within the search criteria, are displayed in a summary view. Clients will display with at least two **Details** icons, if there is more than one unposted endorsement, each endorsement will have its own **Details** icon**.**
- Click the appropriate **Details** icon of the pending endorsement to display the **underwriting** tab.
- If the coverage term effective date in the header is incorrect it is best to abort and start the process again since choosing the correct policy iteration is determined when the date is entered on the servicing screen.
- Click the **Save Changes** link under the policy header to save the changes made in the header.
- The **Stage**, determined by Nexsure, displays **Endorsement.**
- The **Mode,** determined by Nexsure will display the current policy mode.
- The **Status**, determined by the user, displays **Pending** in the header. The status should not be changed until all changes are completed on the applicable applications and populated to the change request form.

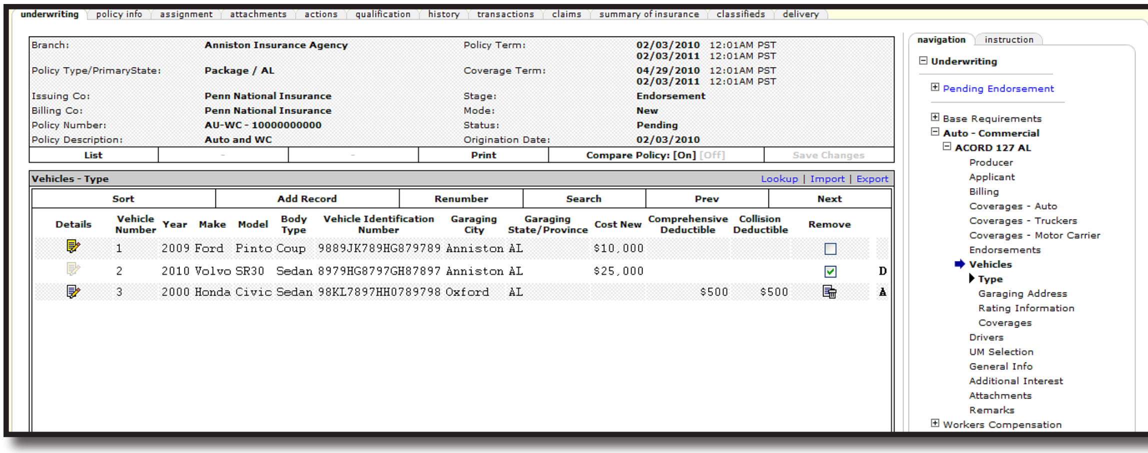
Note: Unposted endorsements are always displayed with a light blue diamond background.



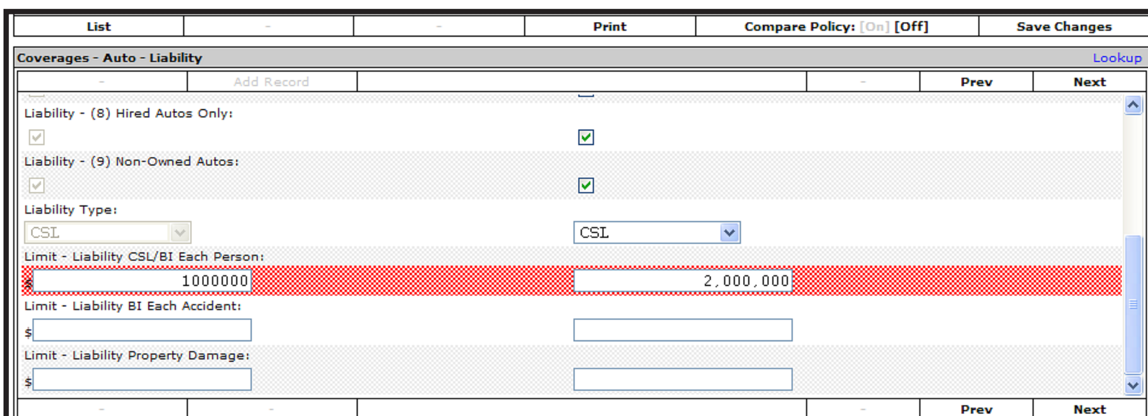
- All form(s) are available for completion in the **navigation** tab, which is found on the right side of the screen and will display forms in a tree format as they are accessed.
- In the **navigation** tab, click the plus **[+]** in front of the line of business to be modified (**Personal Auto** in this example).

Note: All endorsement changes are made on the appropriate line of business application and then populated to the change request form.

- Click the plus **[+]** in front of the ACORD form (**ACORD 127 NH** in this example). This expands the ACORD form into a tree format for completion.
- Click the applicable link, in this case **vehicles**, to be taken directly to that section of the form for modification.
- See “HOW to Work with Forms”, in Chapter 5 - Marketing, *CRM Training Manual* for assistance in modifying the Line of Business form.
- As changes are made to the application you will note the following:
  - Adding a new item to a schedule will display an **A** to the right of that item, notating that item is being added.
  - Deleting an item by clicking the **Remove** check box will display a **D** to the right of that item, notating that item is being deleted.
  - Any yellow **Details** icon denotes that the item is associated with the units at risk. Any changes that need to be made to an associated item should be done at the client’s unit at risk level. Updates done when the endorsement is still pending can be be applied to the pending endorsement at the time the unit at risk is saved. Once updating the form is complete, access the pending endorsement to populate and complete the change.



- If you get sidetracked and cannot remember where you left off, click the **Compare Policy [On]** link in the navigation toolbar below the header to compare this edited version of the application to the original application. Anything highlighted in red is an item that is different from the original application. The **Endorsement (Pending)** link (located above the form input fields and activated by clicking **Compare Policy [On]**) will let you toggle back and forth between the pending endorsement and the current in force policy. Click the **Compare Policy [Off]** link after reviewing the changes.



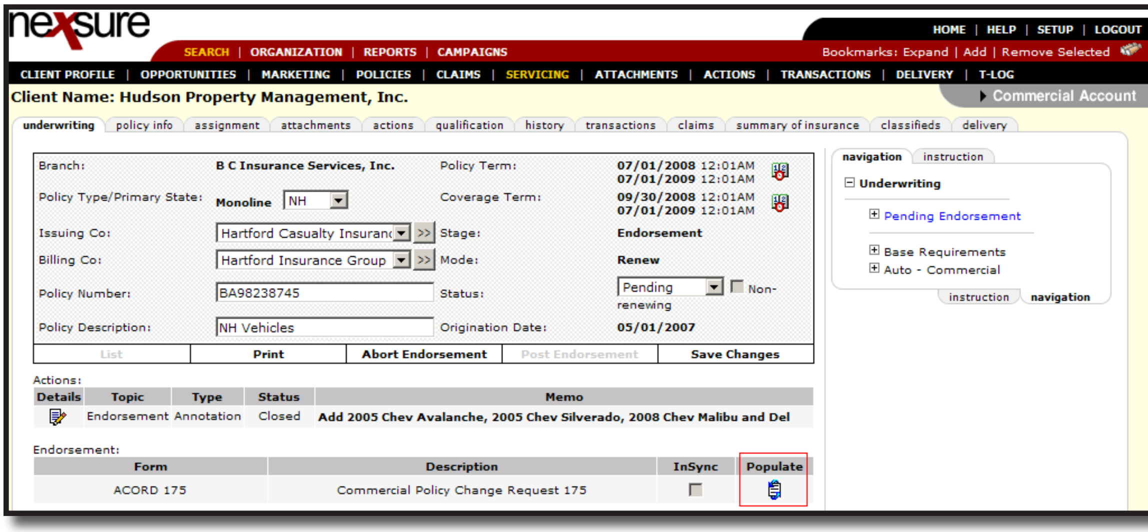
- The endorsement can be left in a **Pending** status if other modifications need to be made.

Note: A pending endorsement will lock the policy. Additional servicing functions cannot be performend on the policy until the status is changed to submitted or the endorsement is aborted.

- Once all changes have been made on the applicable Lines of Business form(s) click the word **Underwriting** in the **navigation** tab to close the forms.
- See "HOW to Abort a Pending Endorsement" later in this chapter if the endorsement is no longer needed.
- See "Keeping Track of Endorsements" later in this chapter to track all pending and submitted endorsements.
- Continue to "**HOW to Populate the Change Request Form**".

HOW to Populate the Change Request Form

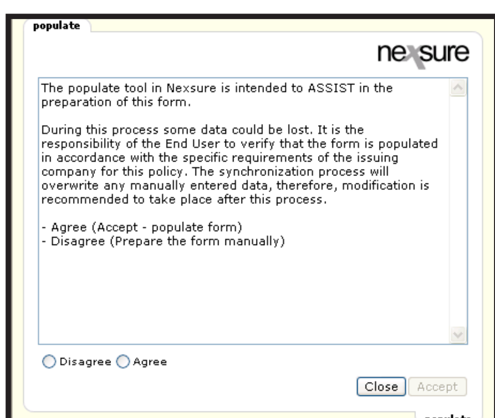
- Once all changes have been made on the applicable Lines of Business form(s) click the word **Underwriting** in the **navigation** tab to close the forms. The **Populate** icon will now be active.
- Click the **Populate** icon to the right of the Change Request form.



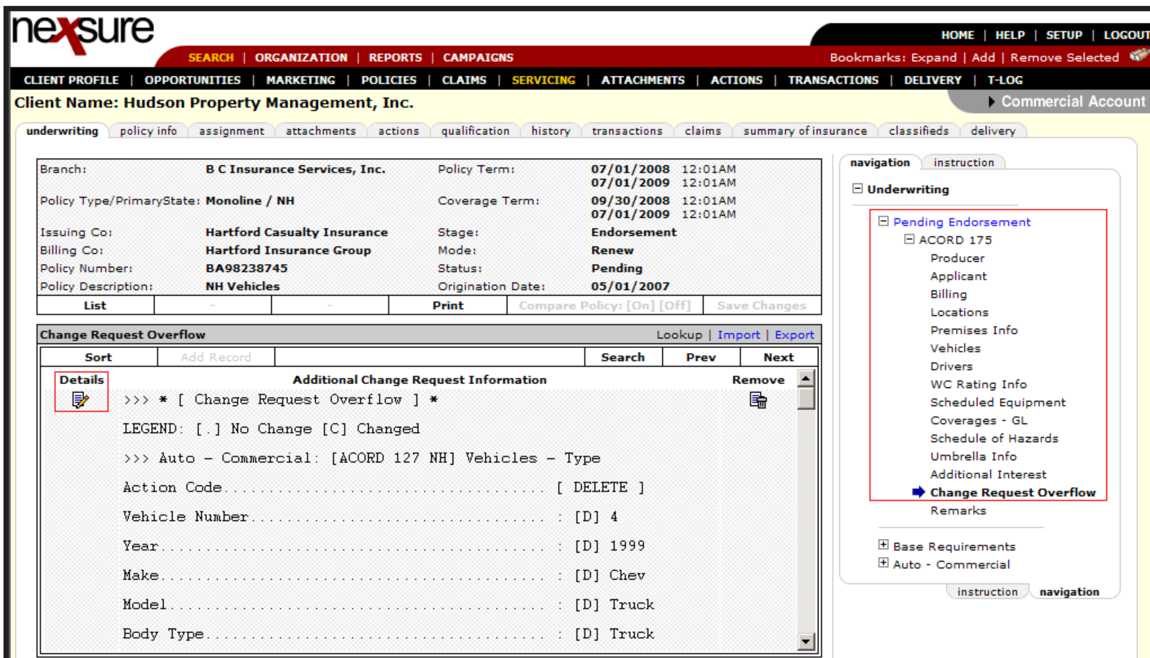
- The **populate** disclaimer is displayed.

Note: The synchronization process overwrites any data you have entered manually into fields that are populated by this process on the change request form. Manual changes to the change request form should always be done after the population process.

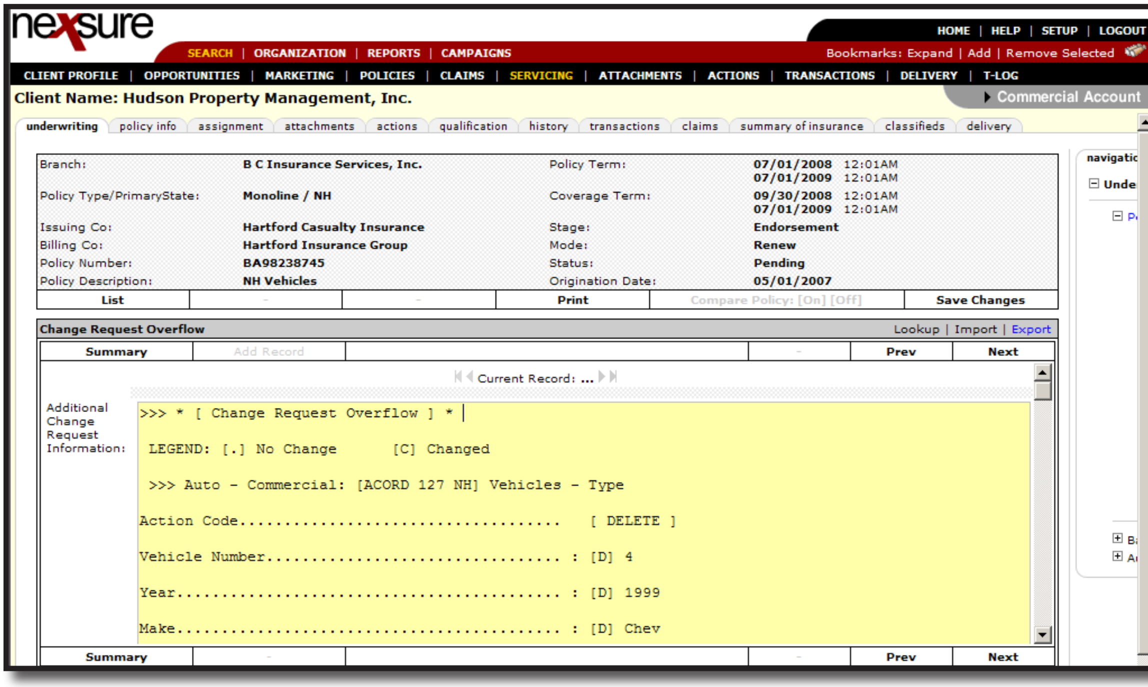
- Click the **Disagree** option, and then **Close** to close the disclaimer pop-up window to manually prepare the Change Request form.
- Click the **Agree** option to activate the **Accept** button.
- Clicking the **Accept** button allows Nexsure to populate the Change Request form with the changes made on the Line of Business form(s).



- In the **navigation** tab, click the plus **[+]** in front of the Pending Endorsement and then click the plus **[+]** in front of the ACORD Change Request form.
- Click the **print** link in the navigation toolbar under the endorsement header to view the change request form in Adobe® Acrobat® for accuracy. It is the responsibility of the end user to verify that the form is populated in accordance with the specific requirements of the issuing company for this policy.
- Click the blue **X** in the upper right corner of the Adobe Acrobat window to close.
- If manual changes need to be made to the Policy Change Request form, it is available for editing in the **navigation** tab.
- Click the plus **[+]** in front the pending endorsement and the plus **[+]** in front of the ACORD Change Request form. The policy change request form is displayed in a tree format. A Change Request Overflow section automatically appears on all Change Request forms. If changes requested on the LOB application either do not have a place on the Change Request or cannot all fit in the applicable section of the Change Request, they will flow to the Change Request Overflow section.
- Click on a link in the navigation tree. The form will open on the left side of the screen under the header for editing. The Change Request Overflow section can be freely edited by clicking the Change Request Overflow link on the Navigation tree and the overflow Details icon.



- Click in the Additional Change Request Information text field to expand the view.



The Line of Business is displayed at the beginning of each section in order to indicate what line of business the changes apply to. The Change Type is indicated; Field labels display on the left side; Policy data displays on the right side.

See "HOW to Work with Forms" in Chapter 5, "Marketing" of this manual, for assistance in editing the form.

Once all changes are completed and saved, click the **Underwriting** link at the top of the **navigation** tree to close the form.

Note: If manual changes are made to the form the **Populate** link will become active again and the InSync check box will no longer be checked. If the **Populate** link is initiated after the form has been altered, keep the following in mind: If manual changes are made to fields that contain data that populated from the original LOB application, or that are blank but exist in the original LOB application, when they are repopulated, these data fields will be overwritten with the original LOB data. Any manual changes made to data fields that do not populate from the original LOB will not be overwritten.

- Once the change request form has been verified and is accurate, change the status in the endorsement header to **Submitted** and click the **Save Changes** link in the navigation toolbar to save the change.

Note: A submitted status locks down the application; no further changes can be made, nor can the endorsement be aborted. See "Endorsement Status Options" later in this chapter.

See "Delivering the Endorsement" in this chapter to e-mail or fax the endorsement from Nexsure.

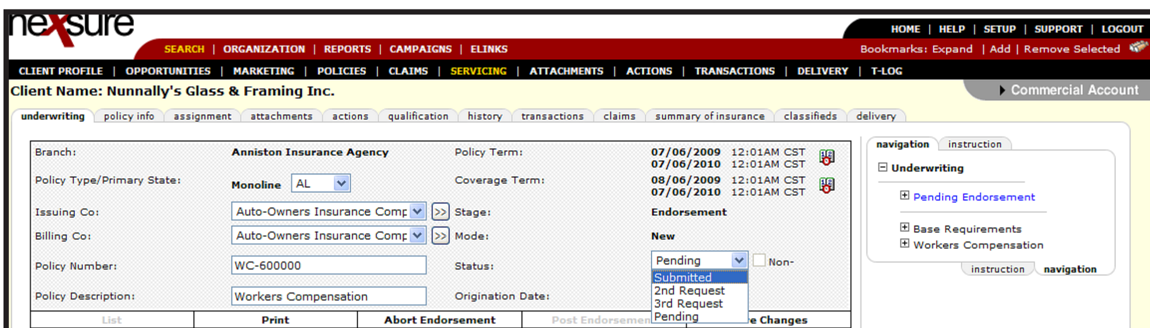
HOW to Abort an Endorsement

Endorsements in a **Pending** status can be aborted, but once the status is changed from pending and saved, the endorsement cannot be aborted nor can the status be changed back to pending. Pending endorsements can be accessed from the **ENDORSEMENTS** link on the **Home** menu or from the **POLICIES** link on the **Client** menu.

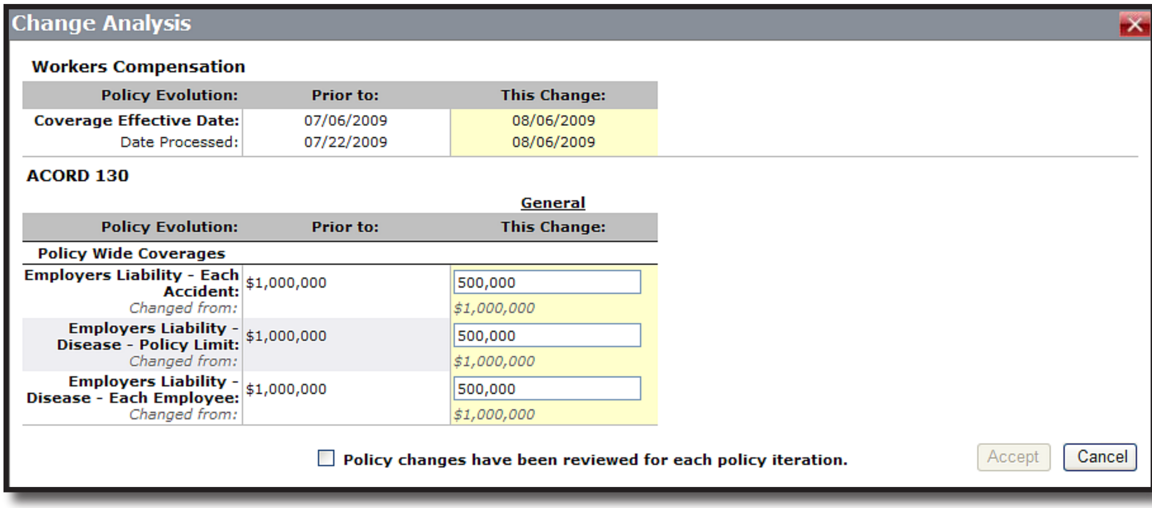
- Click the **ENDORSEMENTS** link on the **Home** menu**.** All pending or submitted endorsements, which fall within the search criteria, will appear in a summary view. Clients will be displayed with at least two **Details** icon**s**. If there is more than one pending or submitted endorsement, each endorsement will have its own **Details** icon**.**
- Clicking the **Details** icon of the pending endorsement displays the **underwriting** tab.
- Click the **Abort Endorsement** link in the navigation toolbar under the header. Click **OK** to confirm. Click **Cancel** to abort.
- The pending endorsement will be deleted and no record of it kept.

HOW to Submit an Endorsement

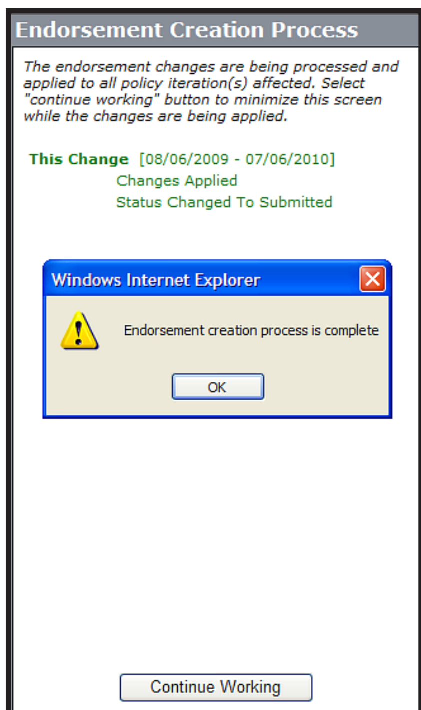
Once the change request has been verified and is accurate, change the status in the endorsement header to **Submitted** and click the **Save Changes** link in the **Navigation Toolbar**.



The **Change Analysis** dialog box is displayed containing a brief description of the changes made. Confirm the coverage effective date and changes, select the **Policy changes have been reviewed for each policy iteration** check box to activate the **Accept** button. Clicking the **Accept** button will change the status of the endorsement to **Submitted**. A policy with a **Submitted** status cannot be altered. Clicking the **Cancel** button will display the endorsement's **underwriting** tab with an unchanged status allowing the user to alter the form as necessary.



Upon clicking the **Accept** button the **Endorsement Creation Process** dialog box is displayed showing progress steps. Once completed, an alert message is displayed. Once the **OK** button is clicked, the change process is complete. Endorsements with a **Submitted**, **2nd** or **3rd** request status will not block the addition of new endorsements, however, a status of **Pending** will. For more information see "Endorsement Status Options" in this chapter.



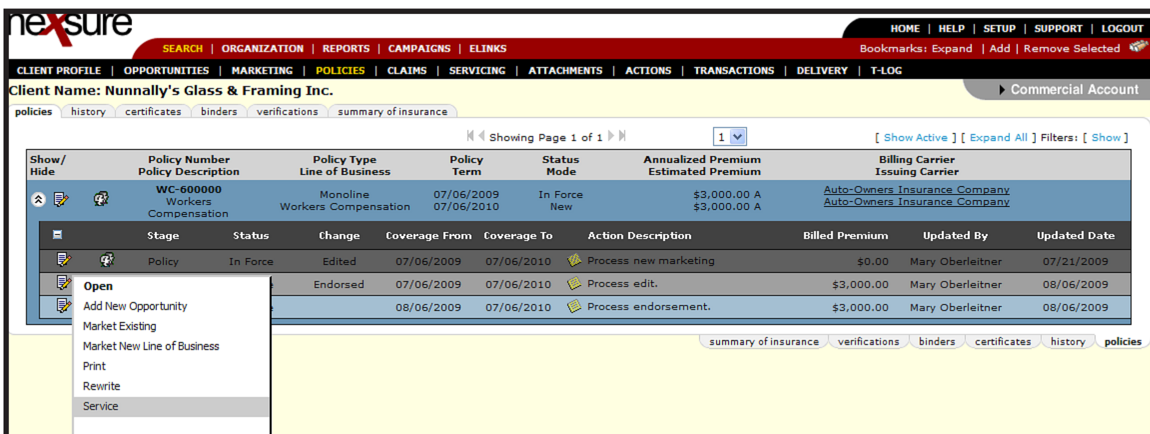
To submit the endorsement via email or fax in Nexsure see "Delivering the Endorsement", in this chapter.

HOW to Process an Out of Sequence Endorsement

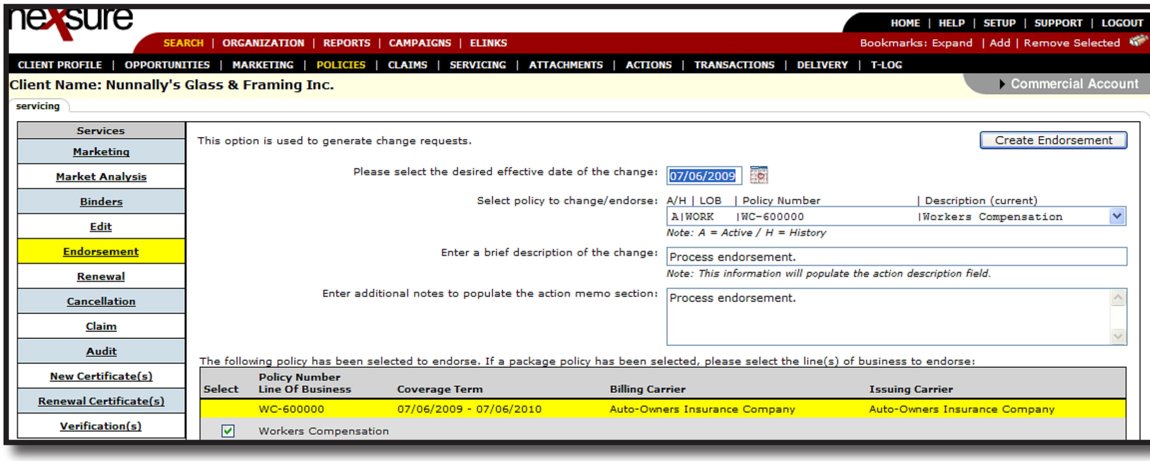
There are occasions where it is necessary to add an endorsement to a policy prior to the current coverage term effective date. Out of sequence endorsements may be added to active policies as well as those found in history. This process is as follows:

Endorsements may be added either by locating the policy and right clicking on the details icon to access context tools and select the option of Servicing or click the Servicing link on the Client menu. If the context tool of servicing is selected, the policy is automatically selected. If the Servicing link on the Client menu is selected the policy will be selected on this screen after selecting the servicing option of Endorse. Since the basic steps to add an endorsement starting at the Servicing screen was covered in this chapter under “Adding an Endorsement” this section will demonstrate how to add an endorsement from the Context tool option of servicing. Adding the out of sequence endorsement from the policy using the context tool, follow these steps:

1. Locate the appropriate client through **SEARCH** and click the **POLICIES** link on the **Client** menu. If the policy is located in history, click the **HISTORY** tab.
2. Locate the policy iteration to add the change to.
3. Right-click on the **Details**  icon and select **Service**.



4. On the **servicing** tab, click the **Endorsement** link. Since the policy was selected first, the date field automatically populates with the **Coverage Term** effective date on the selected policy. Changing the date and pressing the **Tab** key will automatically change the policy to reflect the correct iteration of the selected policy.



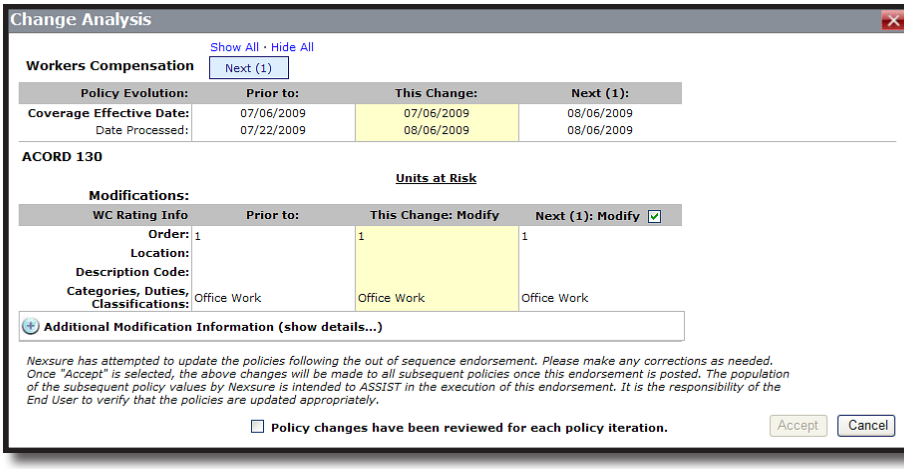
5. Clicking the **Create Endorsement** button will display the endorsement's **underwriting** tab.

6. Access the section of the form and change according to the request and populate the change request by clicking the **Populate** icon. For detailed instructions populating the change see "Completing the Change and Populating" in this chapter.

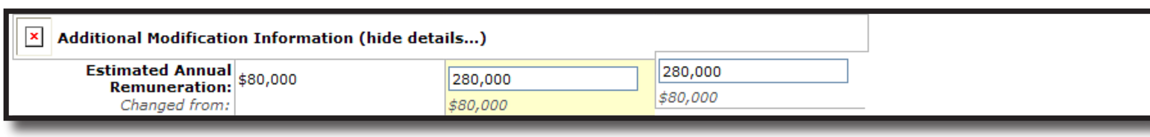
7. Once the change request is verified as correct, change the status in the header to submitted and click the **Save Changes** link. For detailed instructions on changing status to submitted see "How to Submit an Endorsement" in this chapter".

8. The **Change Analysis** is displayed containing a brief description of the changes made. Any policy iterations that have a date greater than the coverage effective date of this change will be displayed providing the opportunity to include or exclude the addition of the change request. In this example the policy was modified on **8/6/2009** which is greater than the change request coverage effective date of **7/6/2009** being added. Since both of these policies should be affected by this change, leaving the box selected by the **8/6/2009** iteration of the policy will allow the addition of the change request to this iteration of the policy also.

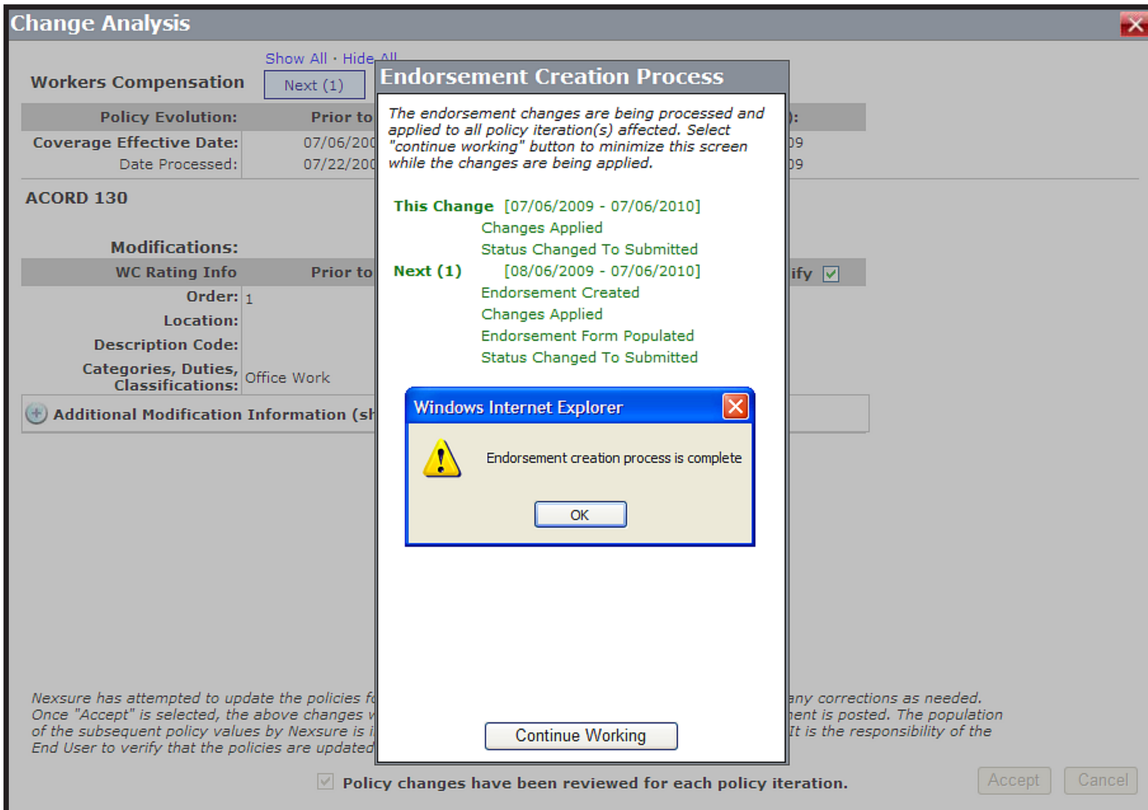
9. Confirm the coverage effective date and changes, select the **Policy changes have been reviewed for each policy iteration** check box to activate the **Accept** button. Clicking the **Accept** button will change the status of the endorsement to **Submitted**. A policy with a **Submitted** status cannot be altered. Clicking the **Cancel** button will display the endorsement's **underwriting** tab with an unchanged status allowing the user to alter the form as necessary.



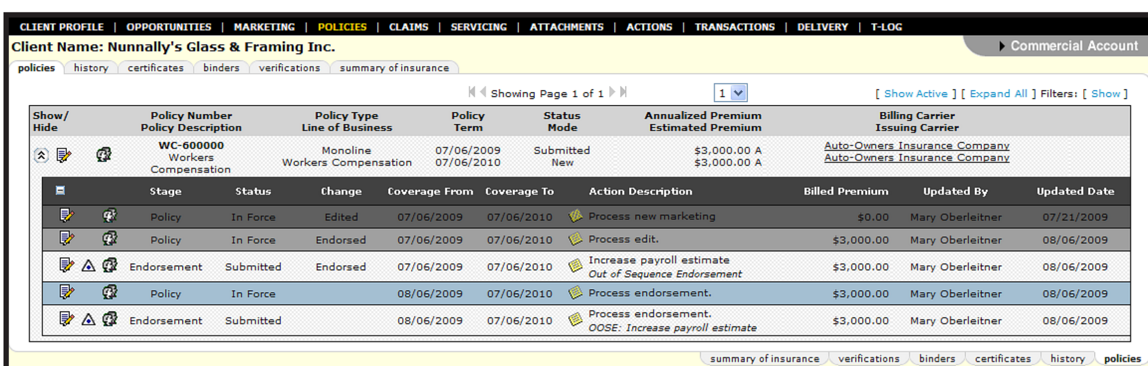
10. If available, clicking the **Additional Modification Information (show details...)** icon will display more modification information.



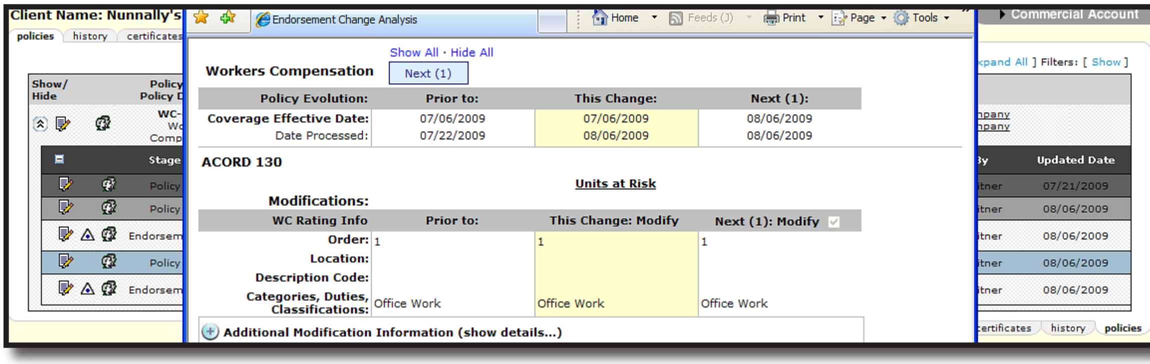
11. When out of sequence endorsements affect multiple policies a change request is added to each iteration selected in the **Change Analysis** dialog box as shown in the Endorsement Creation Process dialog box below.



12. These endorsements are added to the policy and can be seen on the policy summary view. A notation of OOSE below the action identifies that the endorsement added is an out of sequence endorsement displayed on the summary screen.



13. As long as the changes are in a **Submitted**, **2nd** or **3rd** request status, the **Delta** icon is available to select to show changes. Clicking the **Hide All** link will hide the iteration of the change. Clicking the Show All link to view all iterations. Clicking the **Next (1)** button will display next iteration.

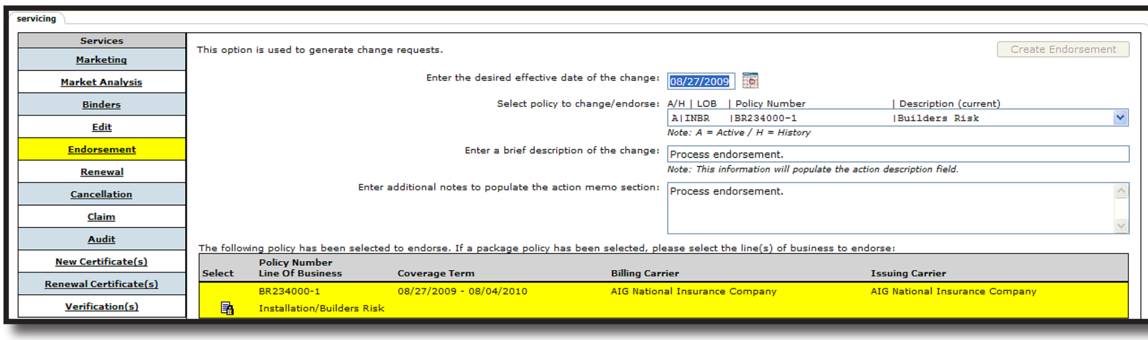


Notes

Endorsement Status Options

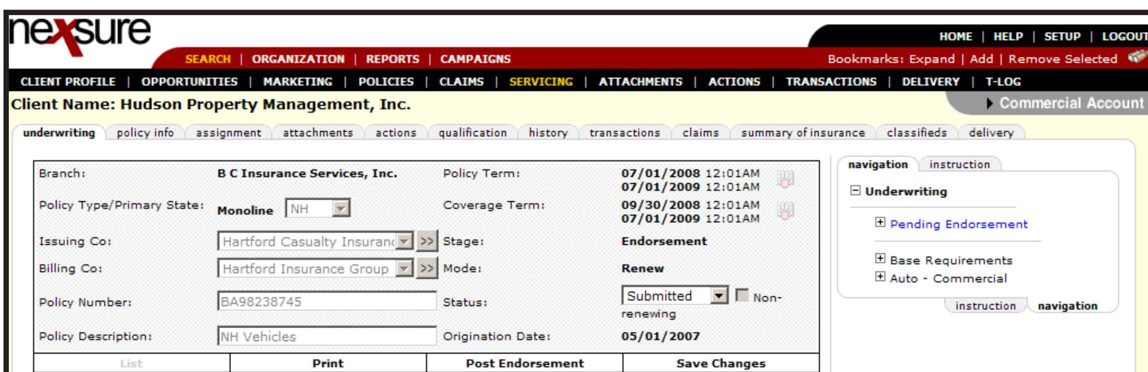
When initiating an endorsement, the **Stage** and **Mode** (displayed in the header) is determined by Nexsure, whereas the user determines the **Status** of the endorsement. The following statuses are available:

- **Pending**: A **Pending** status indicates the endorsement is incomplete and not ready to be submitted to the carrier. As long as the endorsement is in a pending status changes can be made to the application(s). A pending status locks the policy. No other servicing functions can be done on the policy until either the endorsement is aborted or the status is changed to submitted.



- **Submitted**: A **Submitted** status indicates the endorsement is complete and has been, or is ready to be submitted to the carrier for approval. A submitted, 2nd or 3rd request locks down the application(s) and no further changes can be made.

Note: A submitted status will allow another endorsement to be initiated.



2nd Request: A 2nd Request indicates a response has not been received and the endorsement has been submitted for a second time to the carrier.

3rd Request: A 3rd Request indicates a response has still not been received and the endorsement has been submitted for a third time to the carrier.

Note: Changing the status throughout the endorsement process will allow a quick overview of the endorsement and helps you keep track of where you are in the endorsement process.

Once the status has been changed from pending to submitted, 2nd request or 3rd request the endorsement may not be changed to show pending again. Once submitted, the endorsement cannot be aborted.

If the status was changed from pending and the **Save Changes** link was selected by mistake, the only recourse is to post the endorsement and enter a description indicating the mistake. Prior to posting, the action memo should be modified to indicate the mistake as well.

New endorsements can be processed on policies that have existing endorsements with a status of submitted, 2nd request or 3rd request. The submitted endorsement contains the current policy information so new endorsements will be processed off the submitted application. This is to keep coverage information correct.

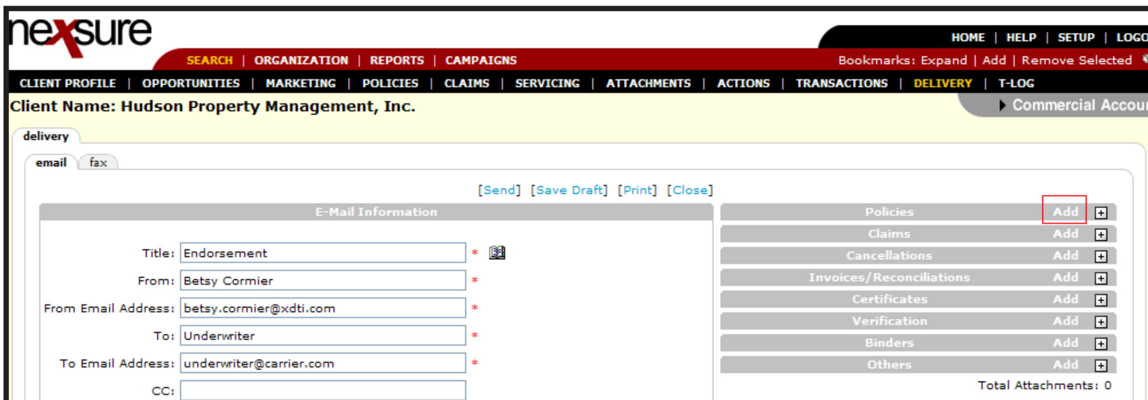
Notes

Delivering the Endorsement

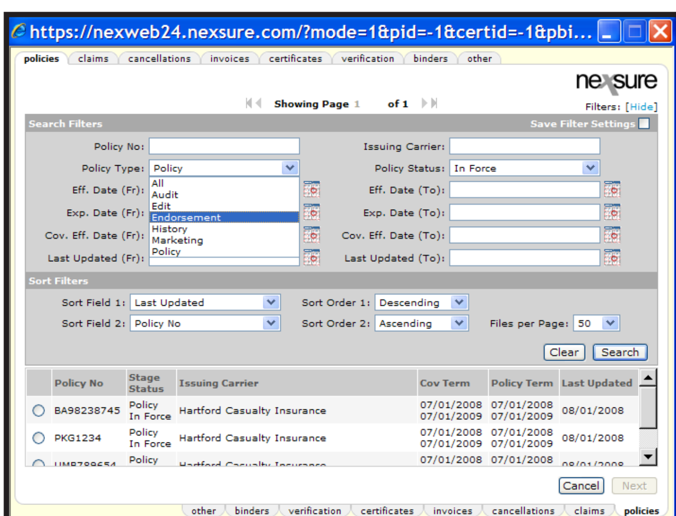
The endorsement **Change Request** form may be delivered from **DELIVERY** on the **Client** menu or the **delivery** tab at policy **underwriting**. The endorsement can be delivered as an **email** or **fax**.

HOW to Deliver the Endorsement from DELIVERY on the Client Menu

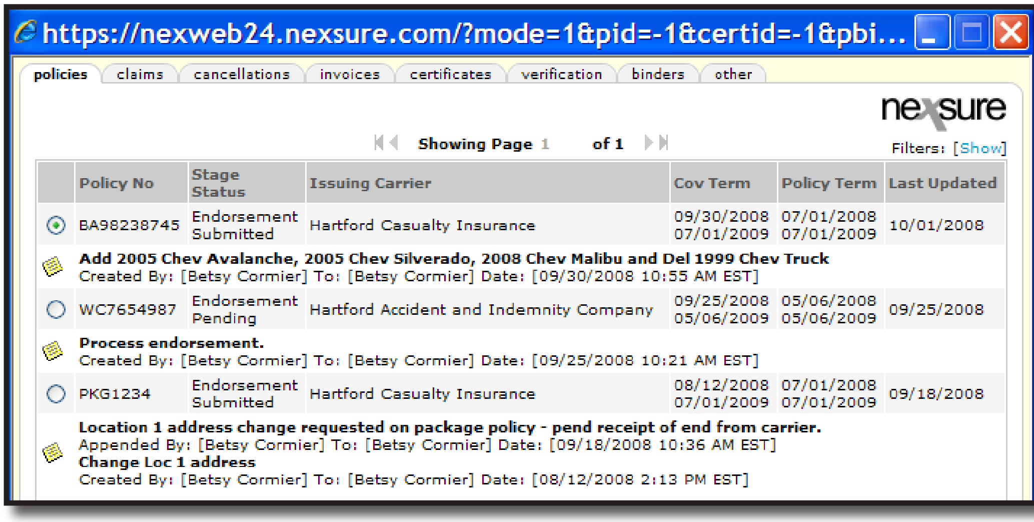
- Locate the appropriate client through **SEARCH** and click the **DELIVERY** link on the **Client** menu.
- Click the **[Add New]** link on the **delivery** summary screen.
- The **email** tab displays by default. Click on the **fax** tab to deliver by fax.
- Complete the required email or fax information on the left side of the screen.
- The right side of the delivery screen is used to attach forms and documents to the email or fax. Click the **Add** link in the gray policies line.



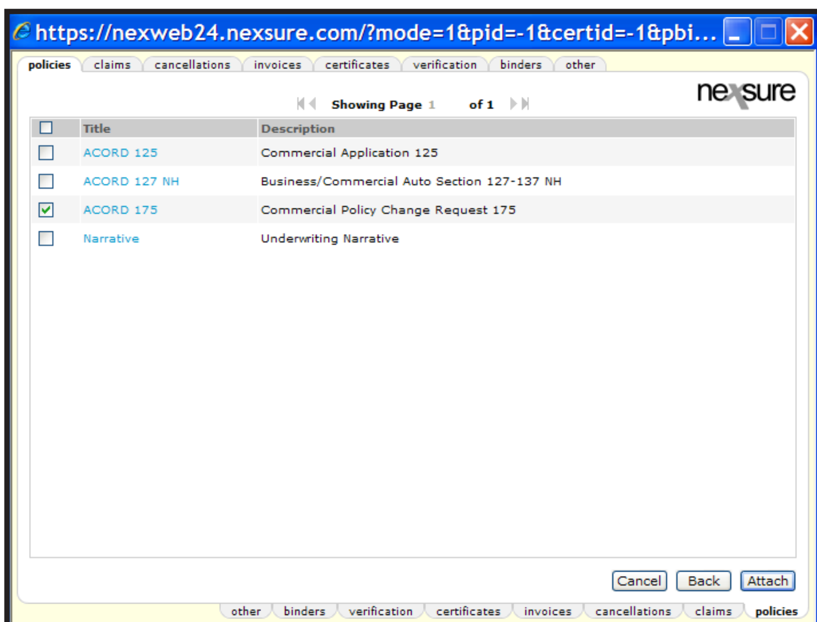
- The **Attachment** pop-up window **policies** tab will display listing the client's **In Force** policies. Click the **[Show]** filter link and change the **Policy Type** selection to **Endorsement**. Click **Search** to find the client's policies for endorsements.



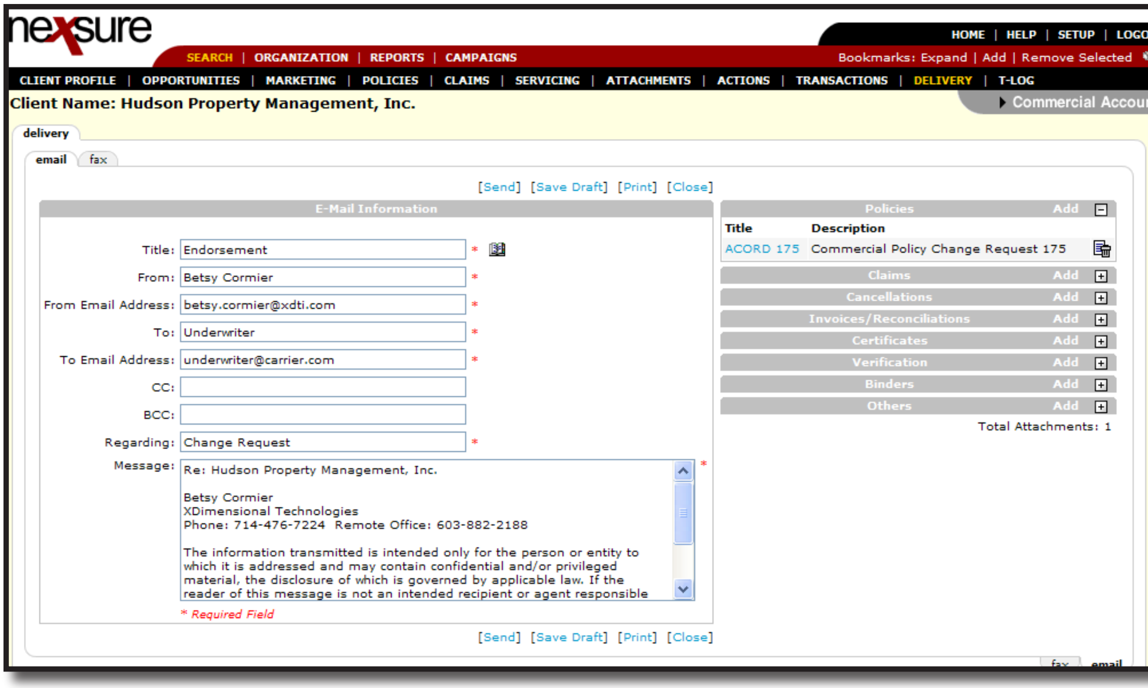
- All endorsements are displayed with the **Stage**, **Status**, **Issuing Carrier**, **Coverage** and **Policy Term** along with the memo from the action annotation. Click to select the appropriate endorsement for delivery.



- Click the **Next** button.
- All lines of business applications and the **Change Request** form are displayed and available for selection. Click to select the **Change Request** form to be included in the email or fax.



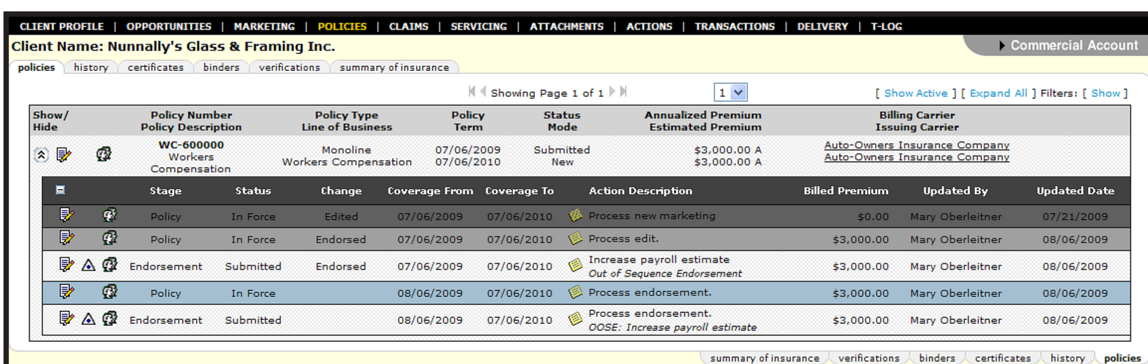
- Click **Attach** to advance. Clicking **Back** will page back; clicking **Close** will abort the delivery.



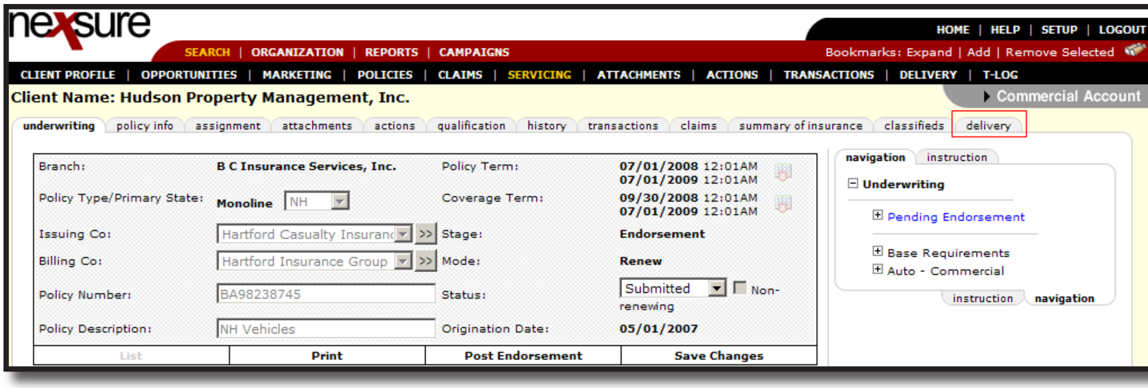
- Click the **[Send]** link to send the email or fax.

HOW to Deliver the Endorsement from the Delivery Tab at Policy Underwriting

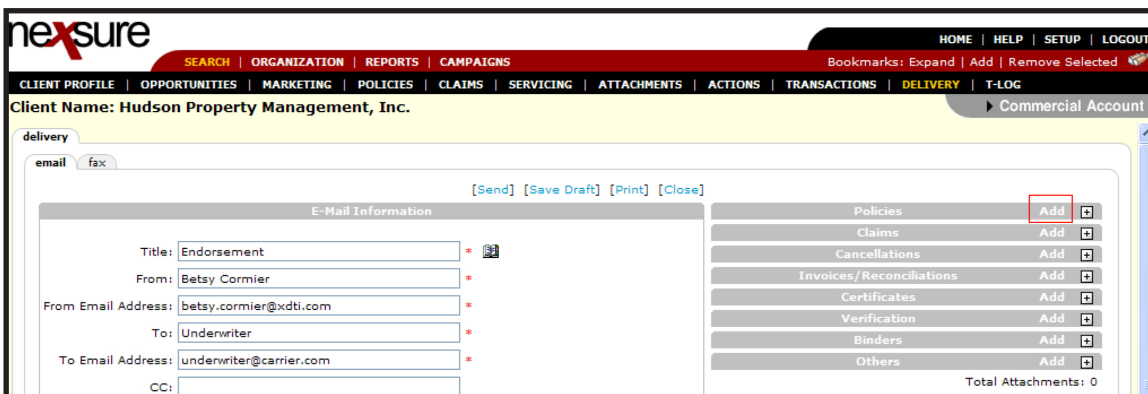
- Locate the appropriate client through **SEARCH** and click the **POLICIES** link on the **Client** menu.
- Click the **Details** icon of the endorsement to be delivered.



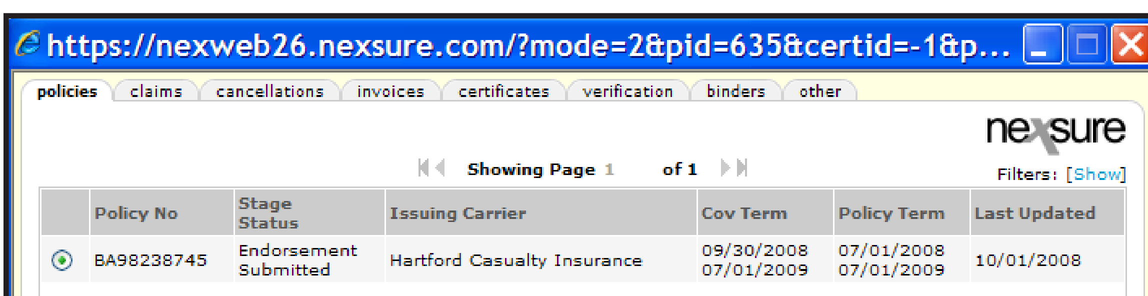
- The underwriting tab of the endorsement is displayed. Click the delivery tab.



- Click the **[Add New]** link on the **delivery** summary screen.
- The **email** tab displays by default. Click on the **fax** tab to deliver by fax.
- Complete the required email or fax information on the left side of the screen.
- The right side of the delivery screen is used to attach forms and documents to the email or fax.
- Click the **Add** link in the gray policies line.

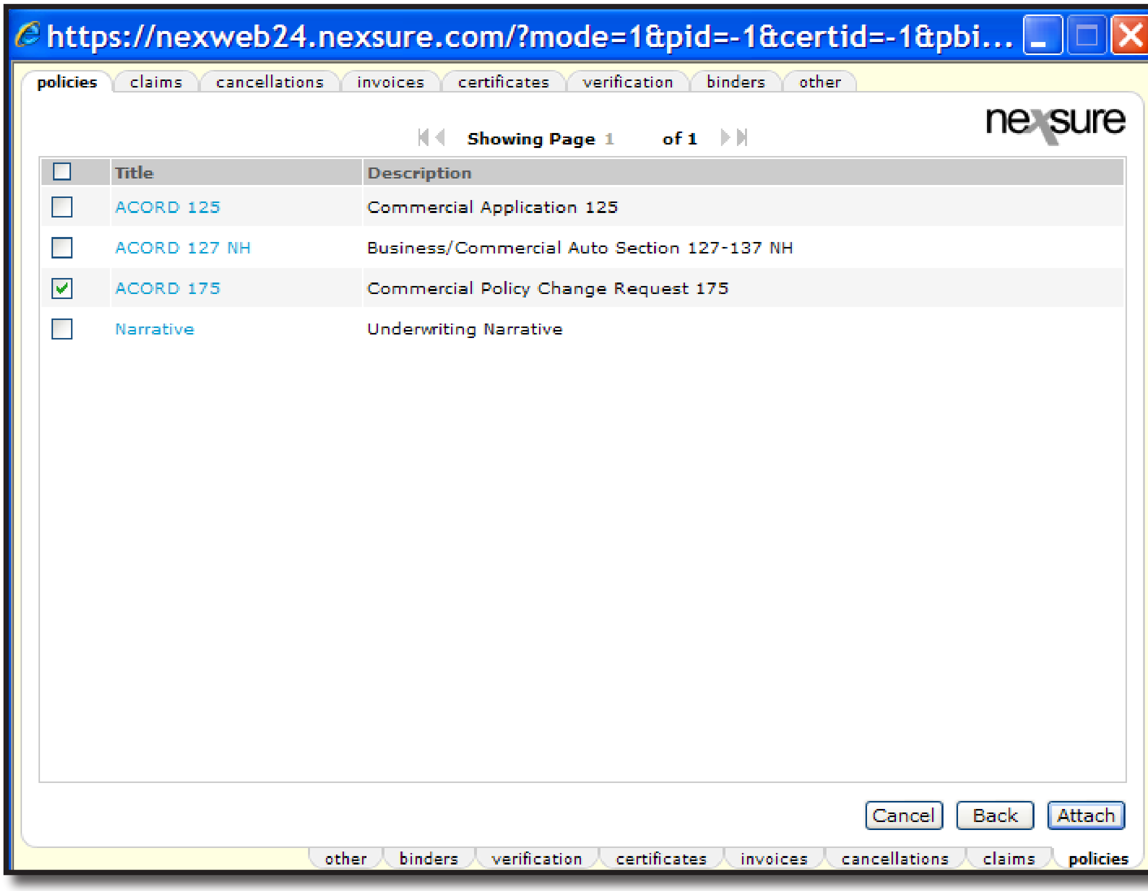


- The **Attachment** pop-up window **policies** tab will display with the endorsement policy pre-selected.



- Click the **Next** button.

- All lines of business applications and the **Change Request** form are displayed and available for selection. Click to select the **Change Request** form to be included in the email or fax.



- Click **Attach** to advance. Clicking **Back** will page back; clicking **Close** will abort the delivery.
- Click the **[Send]** link to send the email or fax.

After clicking **[Send]** to send the email or fax, the delivery summary screen displays the **Status Message** of the email or fax. The status will update as the screen is refreshed.

- If the email or fax is unsuccessful, the sender will receive a failed delivery message in their email system inbox.

- Each delivery will have its own **Details** icon. To view the details, perform the following steps:
  - Click the **Details** icon to display the email or fax information, the forms attached and the total number of attachments.
  - Each form included in the email is displayed with a **Magnifying Glass** icon. Click the **Magnifying Glass** icon to view the information contained in the form that was sent.
- For information about Deliveries, see "Deliveries", in Chapter 19, CRM Training Manual.

Note: For invoicing Instructions see "Invoicing", in Chapter 18 of this manual.

Notes

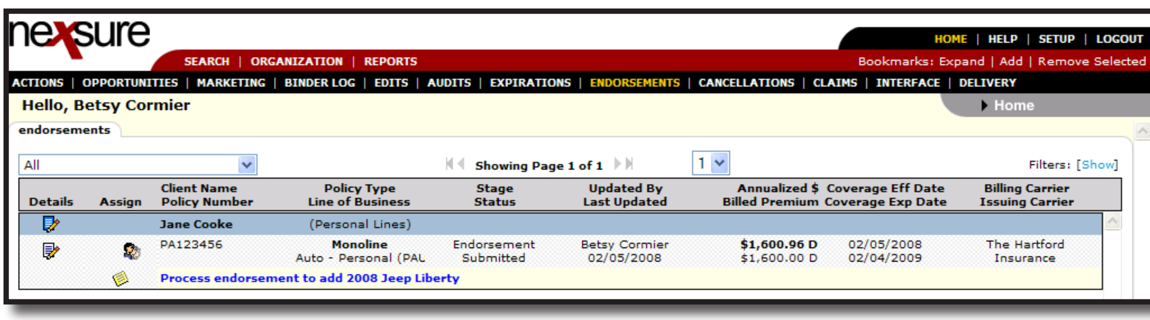
Keeping Track of Endorsements

Policies with endorsements in a pending and/or submitted, 2nd or 3rd request status can be tracked from the **Home** menu or the **Client** menu. The **Home** menu, depending on your filter settings, can display all pending and/or submitted endorsements for the agency. The **Client** menu will display endorsements applicable to the client selected.

HOW to Track Pending Endorsements from the Home Menu

The **HOME** > **ENDORSEMENTS** link serves as a way to keep track of all policies with an endorsement in a pending or submitted status. The **Home** menu is accessible by clicking the **HOME** link on the **Utility** menu in the upper right hand corner of the screen. The **HOME > ACTIONS** screen will be the first screen displayed, to track pending Endorsements click the **ENDORSEMENTS** link on the **Home** menu. The **Home** menu is the third menu down.

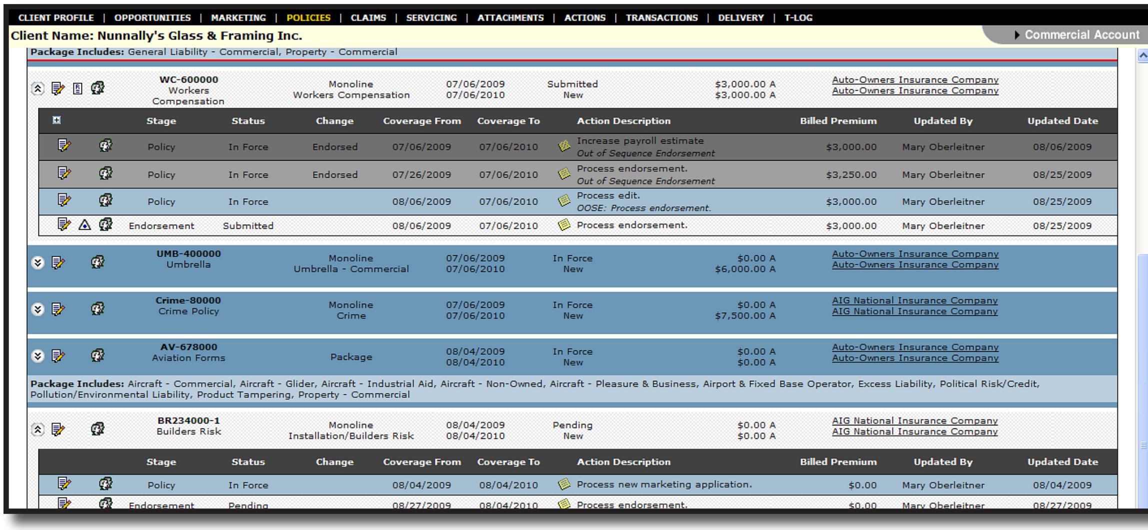
Note: When the endorsement is either posted or aborted, it will no longer appear on the **HOME > ENDORSEMENTS** link.



- Clicking the **ENDORSEMENTS** link displays all pending and/or submitted endorsements that fall within the search filter criteria.
- If the endorsement is not displayed, click the **[Show]** filter, change the search criteria and click the **Search** button to initiate a new search.
- All pending and/or submitted endorsements, which fall within the search criteria, will appear in a summary view. Each client will have at least two **Details** icons**,** if there is more than one pending or submitted endorsement for the client each endorsement will have its own **Details** icon.
  - Clicking the first **Details** icon, with the dark blue border, displays the card file for the client.
  - Clicking the second **Details** icon displays the **underwriting** tab for the pending or submitted endorsement.

HOW to Track Pending Endorsements from the Client Menu

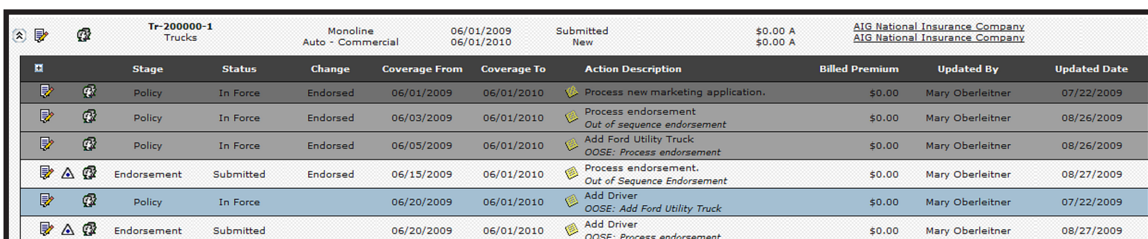
- Access the appropriate entity through **SEARCH.**
- Click the **POLICIES** link on the **Client** menu. The pending and/or submitted endorsements display beneath the policy to which it applies. Each pending and/or submitted endorsement will have its own **Details** icon in the expanded view**.**



- Clicking the **Details** icon of the pending and/or submitted endorsement displays the **underwriting** tab for the endorsement selected.

HOW to Use the Endorsement Summary Screen

There can be only one **Endorsement** in a pending status for a policy, but if the endorsement status has been changed to **Submitted**, **2nd** or **3rd** **Request**, there can be numerous endorsements on a policy. Endorsements, not yet posted, display in a summary view when clicking the **ENDORSEMENT** link on the **Home** menu or the **POLICIES** link on the **Client** menu. The summary view will give you pertinent information regarding the endorsement. System created pending endorsements generated in the Out of Sequence (OOS) process could require users to manually process and submit the endorsement. So, make sure to check for pending OOS endorsements after submitting to ensure these are not left incomplete. These pending system created OOS endorsements are generally only created when one field is changed in a schedule (such as a vehicle schedule) on a form added prior to the 2.0 release. The out of sequence endorsement is easily identified from the message displaying below the action annotation.



- Clicking the white **Details** icon displays the **underwriting** tab for the endorsement.

- Clicking the **Assign** icon will display the Assignment List pop-up window with the list of people in the agency assigned to the policy.
- On the policy's header which is always displayed and more obvious in collapsed view, holding the cursor over the **Line of Business/Policy Number/Policy Description/Policy Type** fields displays the information in a larger font for ease of reading. Clicking those items in the summary view will open a display box containing the selected information.
- The **Stage** is determined by Nexsure and will display the endorsement.
- The **Status** is determined by the user and allows a quick overview of the endorsement to keep you informed of where the endorsement is in the process.
- The **Mode** (New, New on Existing, Renew and Re-New-Co) displays which mode the policy is currently in.
- The **Updated By** and **Updated Date** displays the person who updated the endorsement along with the date it was updated.
- The **Annualized $** and **Billed premium** are determined by Nexsure and displays the annualized and billed amounts through posted invoices. The **D** identifies the policy as being Direct billed and **A** for Agency Billed.
- The **Policy Term** will display the effective and expiration dates of the policy only on the policies header.
- The **Coverage Term** will display the effective date of the endorsement and the expiration date of the policy only on the single policy iteration in expanded view.
- The **Issuing Carrier** displayed is the carrier writing the coverage and **Billing Carrier** displayed is the carrier who is billing the policy.
- An endorsement with a pending status can be aborted to remove it from the summary view. See "HOW to abort an Endorsement" in this chapter for instructions. An endorsement in a submitted status must be posted in order to identify it as closed and remove from the **HOME** > **ENDORSEMENTS** screen.

Notes

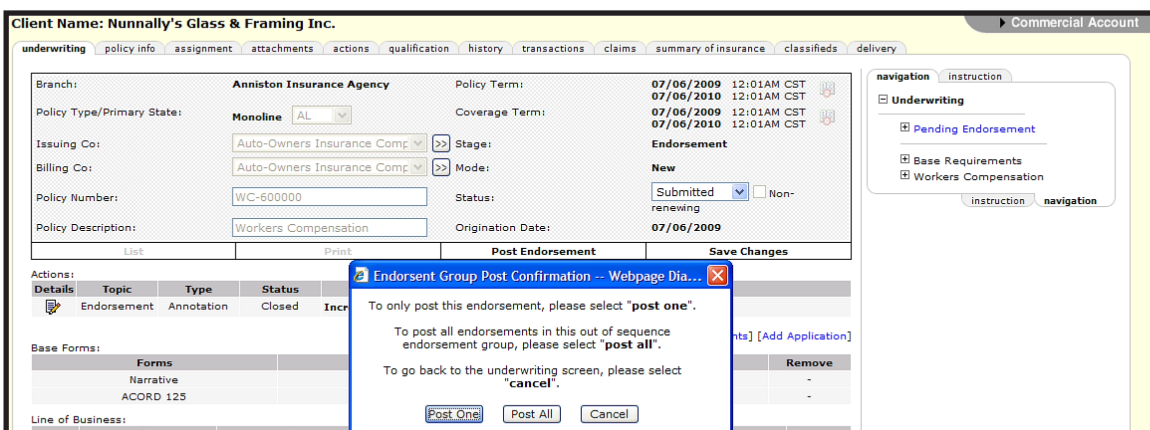
Posting the Endorsement

An endorsement that has been submitted to the carrier should not be posted until the paper endorsement has been received from the carrier. This allows you to track the endorsement on the **Home** menu. When the endorsement is received from the carrier, the endorsement can then be posted. Posting the endorsement will remove it from the **HOME > ENDORSEMENT** link.

Note: An endorsement in a pending status cannot be posted. The status in the policy header must be changed to submitted and saved before the Post Endorsement link becomes active.

HOW to Post a Submitted Endorsement

- The submitted endorsement can be accessed from the **ENDORSEMENT** link on the **Home** menu or from the **POLICIES** link on the **Client** menu.
- Click the **ENDORSEMENT** link on the **Home** menu. All submitted endorsements, which fall within the search criteria, will appear in a summary view. The client is displayed with at least two **Details** icons, if there is more than one outstanding endorsement for the client, each endorsement will have its own **Details** icon.
- Clicking the **Details** icon to the left of the endorsement to be posted displays the **underwriting** tab of the submitted endorsement.
- Click the **Post Endorsement** link in the navigation toolbar under the header to post.
- If posting an out of sequence endorsement, the option to post all is provided. To post just the selected endorsement, click the **Post One** button. To post all, click the **Post All** button. To abort, click the **Cancel** button.



- The iterations of the policy that are no longer active will display with a gray background. Only the active policy is displayed with a dark blue background.
- Clicking on the **Details** icon will allow access to iteration of the policy prior to the endorsement.

Note: Endorsements can be posted in any order.

Notes