Technology Training

Commercial Lines:
Basic Endorsements
(CPP and WC)

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Technology Training

Amend Mailing Address

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Amend Mailing Address

❑ Click **Endorse** under **Actions**.

    ❑ If **Endorse** is not available, click **More** to access it.
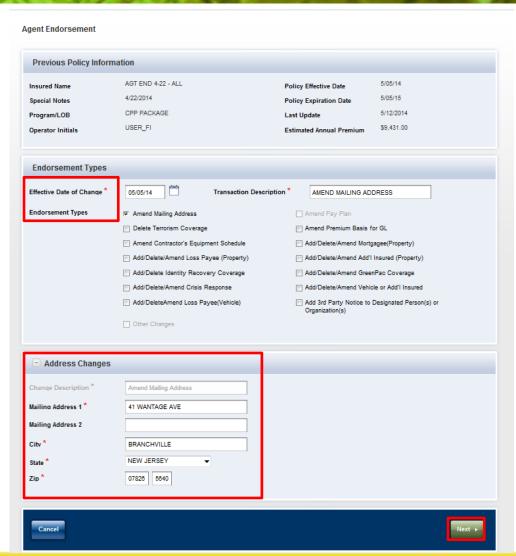
SELECTIVE®
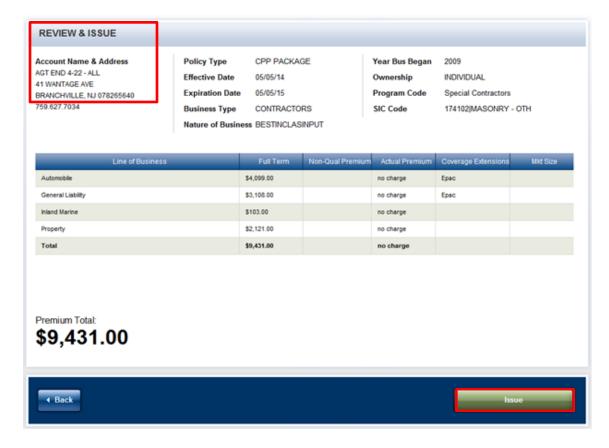Response is everything.

Amend Mailing Address

- ❑ Enter *Effective Date of Change*

- ❑ Select **Amend Mailing Address**
  - ❑ *Transaction Description* will prefill but can be modified

- ❑ Make changes to the Mailing Address

- ❑ Click **Next**

Note:
- ○ *Endorsement Types* vary based upon your specific policy
- ○ More than one endorsement can be selected, if needed.

Agent Endorsement

Previous Policy Information

Insured Name	AGT END 4-22 - ALL	Policy Effective Date	5/05/14
Special Notes	4/22/2014	Policy Expiration Date	5/05/15
Program/LOB	CPP PACKAGE	Last Update	5/12/2014
Operator Initials	USER_FI	Estimated Annual Premium	$9,431.00

Endorsement Types

Effective Date of Change * 05/05/14   Transaction Description * AMEND MAILING ADDRESS

Endorsement Types
- ☑ Amend Mailing Address
- ☐ Delete Terrorism Coverage
- ☐ Amend Contractor's Equipment Schedule
- ☐ Add/Delete/Amend Loss Payee (Property)
- ☐ Add/Delete Identity Recovery Coverage
- ☐ Add/Delete/Amend Crisis Response
- ☐ Add/DeleteAmend Loss Payee(Vehicle)
- ☐ Amend Pay Plan
- ☐ Amend Premium Basis for GL
- ☐ Add/Delete/Amend Mortgagee(Property)
- ☐ Add/Delete/Amend Add'l Insured (Property)
- ☐ Add/Delete/Amend GreenPac Coverage
- ☐ Add/Delete/Amend Vehicle or Add'l Insured
- ☐ Add 3rd Party Notice to Designated Person(s) or Organization(s)
- ☐ Other Changes

⊟ Address Changes

Change Description *	Amend Mailing Address
Mailing Address 1 *	41 WANTAGE AVE
Mailing Address 2	
City *	BRANCHVILLE
State *	NEW JERSEY
Zip *	07826 5640

Cancel   Next ►

SELECTIVE®
Response is everything.

Amend Mailing Address

❑ Review and click **Issue** to complete your endorsement

Technology Training

Amend Pay Plan

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Amend Pay Plan

❑ Click **Endorse** under __Actions__.
  ❑ If **Endorse** is not available, click **More** to access it.

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Amend Pay Plan

- Enter *Effective Date of Change*
  - Must be within 45 days of policy effective date

- Select **Amend Pay Plan**
  - *Transaction Description* will prefill but can be modified

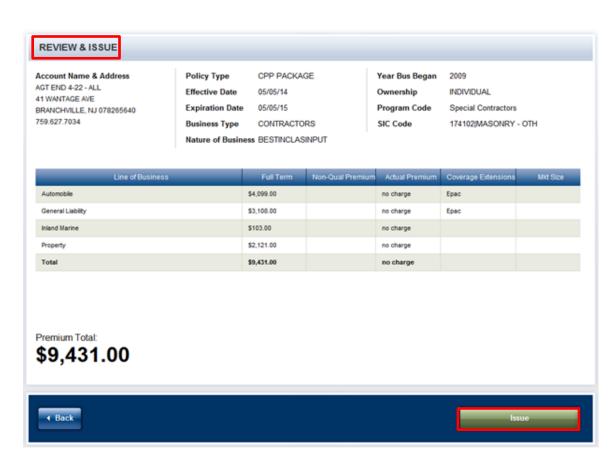- Select the Pay Plan from the drop down

- Click **Next**

Note:

o *Endorsement Types* vary based upon your specific policy

o Pay Plan changes cannot be combined with other endorsement changes.

SELECTIVE®
Response is everything.

Amend Pay Plan

❑ Review and click **Issue** to complete your endorsement.

REVIEW & ISSUE

Account Name & Address
AGT END 4-22 - ALL
41 WANTAGE AVE
BRANCHVILLE, NJ 078265640
759.627.7034

Policy Type	CPP PACKAGE
Effective Date	05/05/14
Expiration Date	05/05/15
Business Type	CONTRACTORS
Nature of Business	BESTINCLASINPUT

Year Bus Began	2009
Ownership	INDIVIDUAL
Program Code	Special Contractors
SIC Code	174102|MASONRY - OTH

Line of Business	Full Term	Non-Qual Premium	Actual Premium	Coverage Extensions	Mkt Size
Automobile	$4,099.00		no charge	Epac	
General Liability	$3,108.00		no charge	Epac	
Inland Marine	$103.00		no charge		
Property	$2,121.00		no charge		
Total	$9,431.00		no charge		

Premium Total:
$9,431.00

◀ Back   Issue

Technology Training

Delete Terrorism Coverage

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Delete Terrorism Coverage

❑ Click **Endorse** under **Actions**.
   ❑ If **Endorse** is not available, click **More** to access it.

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SELECTIVE®
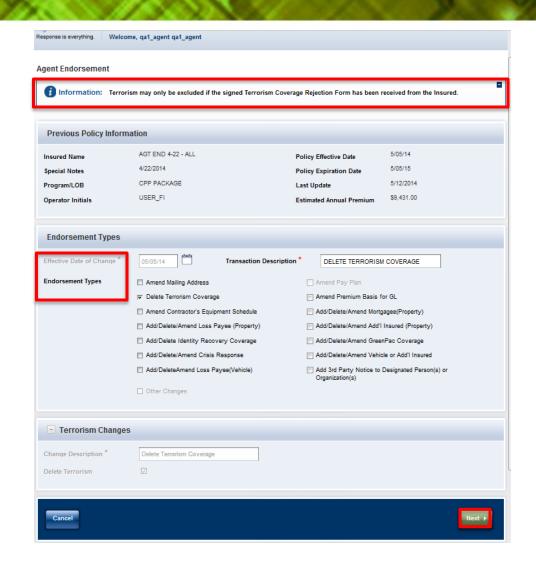Response is everything.

Delete Terrorism Coverage

- ❏ Enter *Effective Date of Change*

- ❏ Select **Delete Terrorism Coverage**
    - ❏ *Transaction Description* will prefill but can be modified

- ❏ Click **Next**

Note:
- ○ *Endorsement Types* vary based upon your specific policy
- ○ More than one endorsement can be selected, if needed.

Agent Endorsement

Previous Policy Information

Insured Name	AGT END 4-22 - ALL	Policy Effective Date	5/05/14
Special Notes	4/22/2014	Policy Expiration Date	5/05/15
Program/LOB	CPP PACKAGE	Last Update	4/22/2014
Operator Initials	QA1_AGE	Estimated Annual Premium	$9,431.00

Endorsement Types

Effective Date of Change * __/__/__

Transaction Description * _____

Endorsement Types

- ☐ Amend Mailing Address
- ☐ Delete Terrorism Coverage
- ☐ Amend Contractor's Equipment Schedule
- ☐ Add/Delete/Amend Loss Payee (Property)
- ☐ Add/Delete Identity Recovery Coverage
- ☐ Add/Delete/Amend Crisis Response
- ☐ Add/DeleteAmend Loss Payee(Vehicle)
- ☐ Other Changes

- ☐ Amend Pay Plan
- ☐ Amend Premium Basis for GL
- ☐ Add/Delete/Amend Mortgagee(Property)
- ☐ Add/Delete/Amend Add'l Insured (Property)
- ☐ Add/Delete/Amend GreenPac Coverage
- ☐ Add/Delete/Amend Vehicle or Add'l Insured
- ☐ Add 3rd Party Notice to Designated Person(s) or Organization(s)

Cancel   Next ▶

SELECTIVE®
Response is everything.
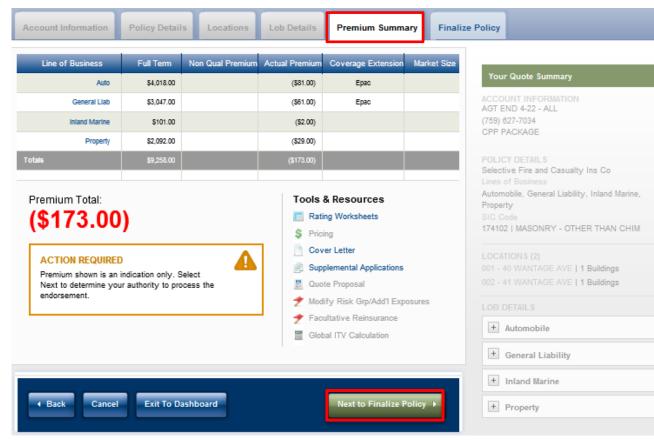
Delete Terrorism Coverage

❑ **Effective Date** of change prefills to Policy Effective Date

❑ Select **Delete Terrorism Coverage**
   ❑ *Transaction Description* will prefill but can be modified

❑ Click **Next**

Note:

o Terrorism can only be excluded if the signed Terrorism Coverage Rejection Form has been completed by the insured.

o *Endorsement Types* vary based upon your specific policy

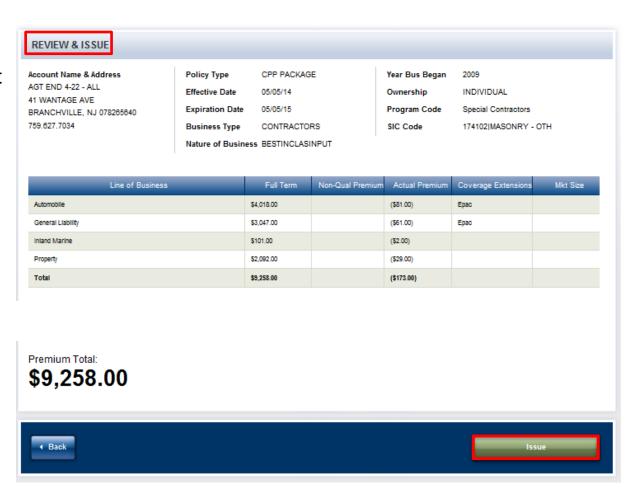o More than one endorsement can be selected, if needed.

Delete Terrorism Coverage

☐ When rating is complete, **Premium Summary** page will display.

☐ Click **Next to Finalize Policy**

SELECTIVE®
Response is everything.

Delete Terrorism Coverage

❑ Review and click **Issue** to complete your endorsement

REVIEW & ISSUE

Account Name & Address	**Policy Type** CPP PACKAGE	**Year Bus Began** 2009
AGT END 4-22 - ALL	**Effective Date** 05/05/14	**Ownership** INDIVIDUAL
41 WANTAGE AVE	**Expiration Date** 05/05/15	**Program Code** Special Contractors
BRANCHVILLE, NJ 078265640	**Business Type** CONTRACTORS	**SIC Code** 174102|MASONRY - OTH
759.627.7034	**Nature of Business** BESTINCLASINPUT	

Line of Business	Full Term	Non-Qual Premium	Actual Premium	Coverage Extensions	Mkt Size
Automobile	$4,018.00		($81.00)	Epac	
General Liability	$3,047.00		($61.00)	Epac	
Inland Marine	$101.00		($2.00)		
Property	$2,092.00		($29.00)		
Total	**$9,258.00**		**($173.00)**		

Premium Total:
$9,258.00

‹ Back   Issue

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Amend GL Premium Basis

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Amend GL Premium Basis

- ☐ Click **Endorse** under **Actions**.
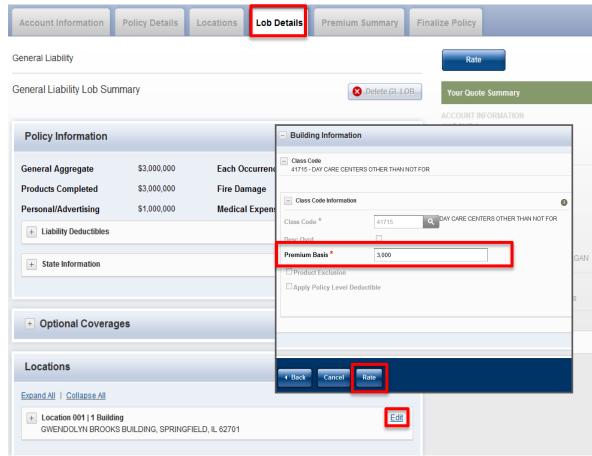 - ☐ If **Endorse** is not available, click **More** to access it.

Confidential and Proprietary
Insurance Learning Services & Business Services Unit

SELECTIVE®
Response is everything.

Amend GL Premium Basis

- Enter *Effective Date of Change*

- Select **Amend GL Premium Basis**
  - *Transaction Description* will prefill but can be modified

- Click **Next**

Note:
- *Endorsement Types* vary based upon your specific policy
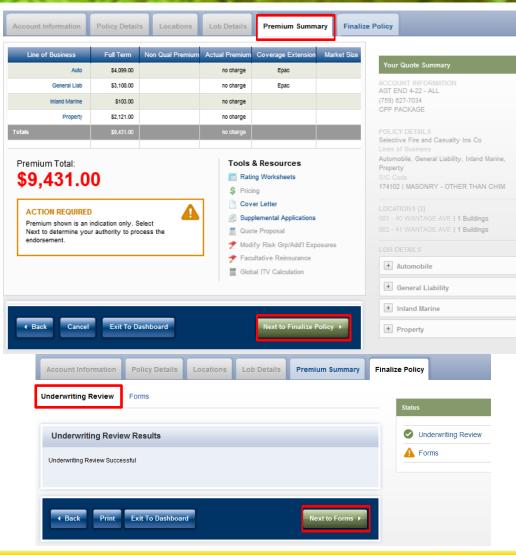- More than one endorsement can be selected, if needed.

Confidential and Proprietary
Insurance Learning Services & Business Services Unit

Amend GL Premium Basis

- On the GL Summary page, find the location you wish to amend and select **Edit**

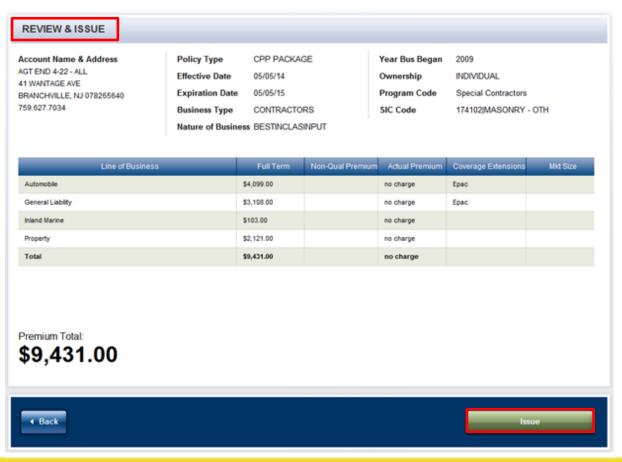- Amend the premium basis of the desired Class Code

- Click **Rate**

| Account Information | Policy Details | Locations | **Lob Details** | Premium Summary | Finalize Policy |

General Liability

Rate

General Liability Lob Summary   ⊗ Delete GL LOB

Your Quote Summary

ACCOUNT INFORMATION

Policy Information

General Aggregate	$3,000,000	Each Occurren
Products Completed	$3,000,000	Fire Damage
Personal/Advertising	$1,000,000	Medical Expens

+ Liability Deductibles

+ State Information

+ Optional Coverages

Locations

Expand All | Collapse All

+ Location 001 | 1 Building
  GWENDOLYN BROOKS BUILDING, SPRINGFIELD, IL 62701   Edit

Building Information

Class Code
41715 - DAY CARE CENTERS OTHER THAN NOT FOR

Class Code Information

Class Code *   41715   🔍   DAY CARE CENTERS OTHER THAN NOT FOR

Desc Ovrd   ☐

Premium Basis *   3,000

☐ Product Exclusion

☐ Apply Policy Level Deductible

◀ Back   Cancel   **Rate**

SELECTIVE
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Amend GL Premium Basis

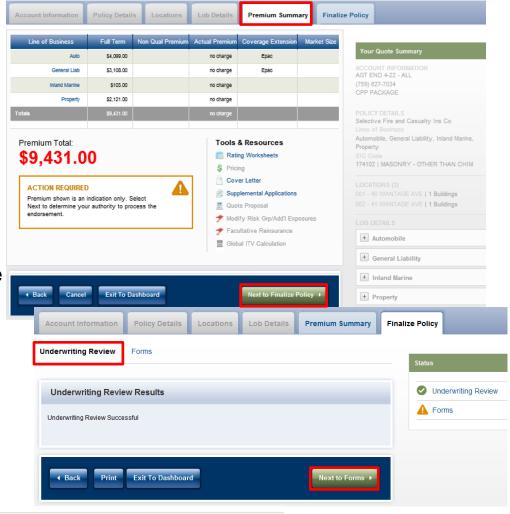☐ When rating is complete, **Premium Summary** page will display

☐ Click **Next to Finalize Policy**

☐ Underwriting Review will display.

☐ Click **Next to Forms**

SELECTIVE®
Response is everything.

Amend GL Premium Basis

❑ Review and click **Issue** to complete your endorsement.

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Amend Contractor's Equipment Schedule

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Amend Contractor's Equipment Schedule

❑ Click **Endorse** under **Actions**
   ❑ If **Endorse** is not available, click **More** to access it

Amend Contractor's Equipment Schedule

- ❑ Enter *Effective Date of Change*

- ❑ Select **Amend Contractor's Equipment Schedule**
  - ❑ *Transaction Description* will prefill but can be modified

- ❑ Click **Next**

Note:
- o *Endorsement Types* vary based upon your specific policy
- o More than one endorsement can be selected, if needed.

Agent Endorsement

Previous Policy Information

Insured Name	AGT END 4-22 - ALL	Policy Effective Date	5/05/14
Special Notes	4/22/2014	Policy Expiration Date	5/05/15
Program/LOB	CPP PACKAGE	Last Update	4/22/2014
Operator Initials	QA1_AGE	Estimated Annual Premium	$9,431.00

Endorsement Types

Effective Date of Change *   __/__/__
Transaction Description *

Endorsement Types

- ☐ Amend Mailing Address
- ☐ Delete Terrorism Coverage
- ☐ Amend Contractor's Equipment Schedule
- ☐ Add/Delete/Amend Loss Payee (Property)
- ☐ Add/Delete Identity Recovery Coverage
- ☐ Add/Delete/Amend Crisis Response
- ☐ Add/DeleteAmend Loss Payee(Vehicle)
- ☐ Amend Pay Plan
- ☐ Amend Premium Basis for GL
- ☐ Add/Delete/Amend Mortgagee(Property)
- ☐ Add/Delete/Amend Add'l Insured (Property)
- ☐ Add/Delete/Amend GreenPac Coverage
- ☐ Add/Delete/Amend Vehicle or Add'l Insured
- ☐ Add 3rd Party Notice to Designated Person(s) or Organization(s)
- ☐ Other Changes

[Cancel]   [Next ▸]

SELECTIVE
Response is everything.

Amend Contractor's Equipment Schedule

❑ Enter changes to the Contractor's Equipment.
  ❑ Add *Loss Payee*, if needed

❑ Click **Rate** to proceed

SELECTIVE®
Response is everything.

Amend Contractor's Equipment Schedule

- ☐ When rating is complete, **Premium Summary** page will display
- ☐ Click **Next to Finalize Policy**

- ☐ **Underwriting Review** will display
- ☐ Click **Next to Forms**

IMPORTANT NOTE:

- ☐ Adding/Amending/Deleting a Loss Payee
  - ☐ If you are adding the *first* Contractors Equipment loss payee to this policy, complete form **CM 7195**.
  - ☐ If your policy has an *existing* Contractors Equipment loss payee, submit to your underwriter to complete the Loss Payee form changes

Amend Contractor's Equipment Schedule

❑ Review and click **Issue** to complete your endorsement.

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Add/Delete/Amend Mortgagee (Property – Excluding COP)

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Add/Delete/Amend Mortgagee (Property)

❑ Click **Endorse** under **<u>Actions</u>**.
   ❑ If **Endorse** is not available, click **More** to access it.

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Insurance Learning Services & Business Services Unit

SELECTIVE®
Response is everything.

Add/Delete/Amend Mortgagee (Property)

- Enter *Effective Date of Change*

- Select **Add/Delete/Amend Mortgagee (Property)**
  - *Transaction Description* will prefill but can be modified

- Click **Next**

Note:

o *Endorsement Types* vary based upon your specific policy

o More than one endorsement can be selected, if needed.

Add/Delete/Amend Mortgagee (Property)

☐ Click *Complete Form* to access the Property Mortgagee form.

☐ Enter changes to the Mortgagee(s)

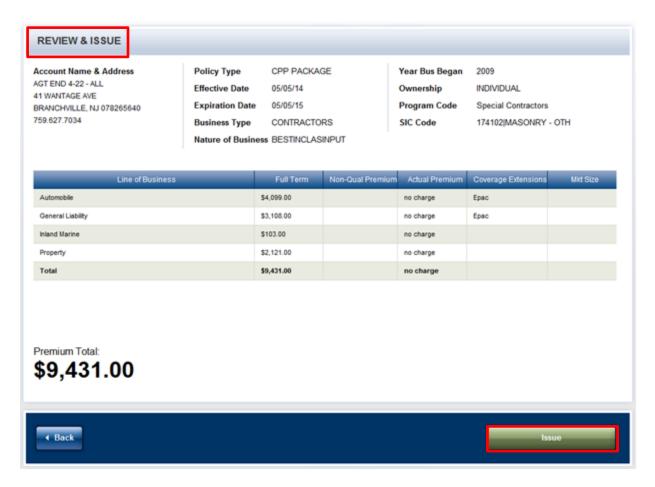☐ Click **Return to Property Forms**, when complete

Note:
- Use *Add Name* to enter additional mortgagees.
- Use *Copy Names* to copy information from an existing Named Interest.
- Use ADD LOC/BLDG(S) to attach mortgagee to location/building

Add/Delete/Amend Mortgagee (Property)

❑ Click **Next** or **Review/Issue** to proceed

SELECTIVE®
Response is everything.

Add/Delete/Amend Mortgagee (Property)

❑ Review and click **Issue** to complete your endorsement

Technology Training

Add/Delete/Amend Loss Payee (Property – Excluding COP)

SELECTIVE®
Response is everything.

Add/Delete/Amend Loss Payee (Property)

❑ Click **Endorse** under **<u>Actions</u>**.
    ❑ If **Endorse** is not available, click **More** to access it.

SELECTIVE®
Response is everything.

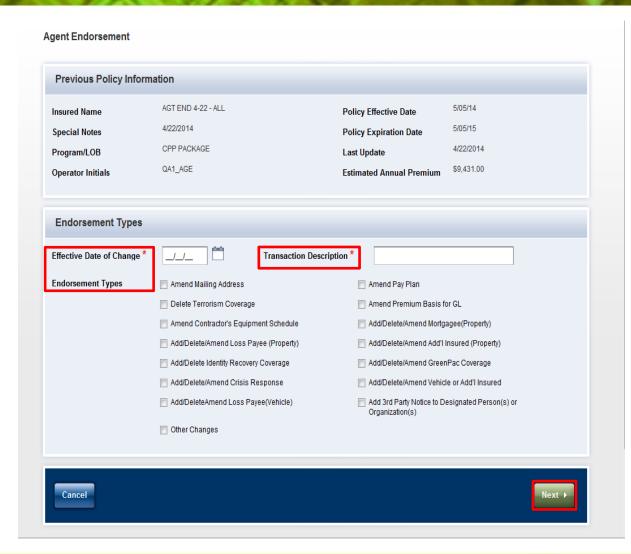# Add/Delete/Amend Loss Payee (Property)

- ❑ Enter *Effective Date of Change*

- ❑ Select **Add/Delete/Amend Loss Payee (Property)**
  - ❑ *Transaction Description* will prefill but can be modified

- ❑ Click **Next**

Note:

o *Endorsement Types* vary based upon your specific policy

o More than one endorsement can be selected, if needed.

Agent Endorsement

Previous Policy Information

Insured Name	AGT END 4-22 - ALL	Policy Effective Date	5/05/14
Special Notes	4/22/2014	Policy Expiration Date	5/05/15
Program/LOB	CPP PACKAGE	Last Update	4/22/2014
Operator Initials	QA1_AGE	Estimated Annual Premium	$9,431.00

Endorsement Types

Effective Date of Change * __/__/__

Transaction Description *

Endorsement Types

- ☐ Amend Mailing Address
- ☐ Delete Terrorism Coverage
- ☐ Amend Contractor's Equipment Schedule
- ☐ Add/Delete/Amend Loss Payee (Property)
- ☐ Add/Delete Identity Recovery Coverage
- ☐ Add/Delete/Amend Crisis Response
- ☐ Add/DeleteAmend Loss Payee(Vehicle)
- ☐ Other Changes

- ☐ Amend Pay Plan
- ☐ Amend Premium Basis for GL
- ☐ Add/Delete/Amend Mortgagee(Property)
- ☐ Add/Delete/Amend Add'l Insured (Property)
- ☐ Add/Delete/Amend GreenPac Coverage
- ☐ Add/Delete/Amend Vehicle or Add'l Insured
- ☐ Add 3rd Party Notice to Designated Person(s) or Organization(s)

Cancel

Next ▶

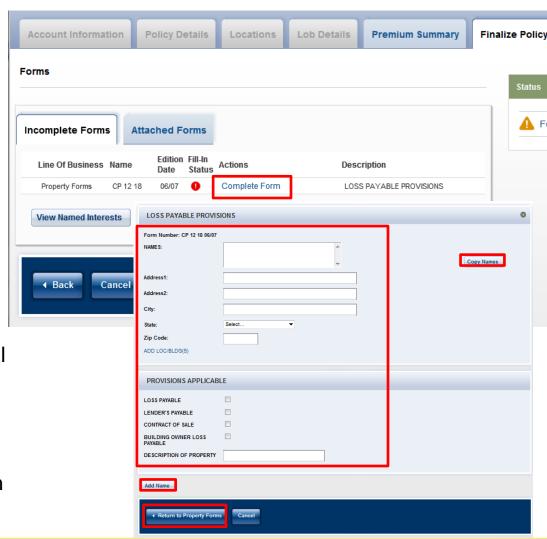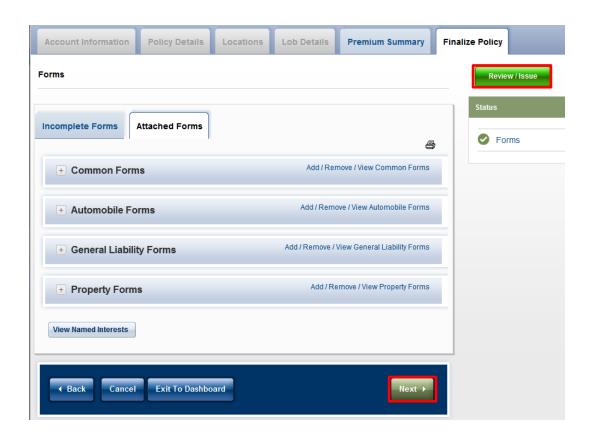# Add/Delete/Amend Loss Payee (Property)

❑ Click *Complete Form* to access the Loss Payee form.

❑ Enter changes to the Loss Payee(s)

❑ Click **Return to Property Forms**, when complete
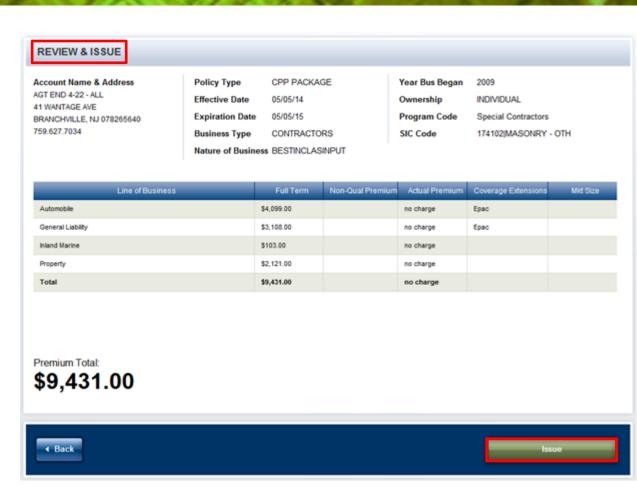
Note:
- Use *Add Name* to enter additional mortgagees.
- Use *Copy Names* to copy information from an existing Named Interest.
- Use ADD LOC/BLDG(S) to attach loss payee to location/building

Add/Delete/Amend Loss Payee (Property)

❑ Click **Next** or **Review/Issue** to proceed

Add/Delete/Amend Loss Payee (Property)

❑ Review and click **Issue** to complete your endorsement

REVIEW & ISSUE

Account Name & Address	Policy Type	CPP PACKAGE	Year Bus Began	2009
AGT END 4-22 - ALL	Effective Date	05/05/14	Ownership	INDIVIDUAL
41 WANTAGE AVE	Expiration Date	05/05/15	Program Code	Special Contractors
BRANCHVILLE, NJ 078265640	Business Type	CONTRACTORS	SIC Code	174102JMASONRY - OTH
759.627.7034	Nature of Business	BESTINCLASINPUT		

Line of Business	Full Term	Non-Qual Premium	Actual Premium	Coverage Extensions	Mkt Size
Automobile	$4,099.00		no charge	Epac	
General Liability	$3,108.00		no charge	Epac	
Inland Marine	$103.00		no charge		
Property	$2,121.00		no charge		
Total	$9,431.00		no charge		

Premium Total:
$9,431.00

◀ Back

Issue

Technology Training

Add/Delete/Amend Additional Insured (Property – Excluding COP)

SELECTIVE®
Response is everything.

Add/Delete/Amend Additional Insured (Property)

❑ Click **Endorse** under **<u>Actions</u>**.
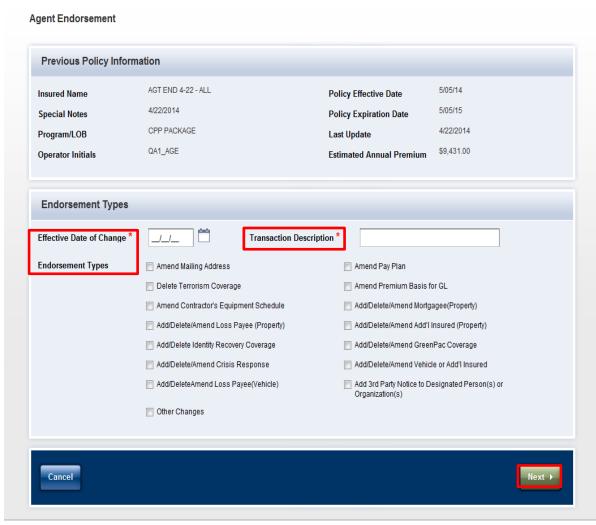   ❑ If **Endorse** is not available, click **More** to access it.

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Insurance Learning Services & Business Services Unit

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Response is everything.

Add/Delete/Amend Additional Insured (Property)

- ❑ Enter *Effective Date of Change*

- ❑ Select **Add/Delete/Amend Additional Insured (Property)**
  - ❑ *Transaction Description* will prefill but can be modified

- ❑ Click **Next**

Note:
- o *Endorsement Types* vary based upon your specific policy
- o More than one endorsement can be selected, if needed.

Agent Endorsement

Previous Policy Information

Insured Name	AGT END 4-22 - ALL	Policy Effective Date	5/05/14
Special Notes	4/22/2014	Policy Expiration Date	5/05/15
Program/LOB	CPP PACKAGE	Last Update	4/22/2014
Operator Initials	QA1_AGE	Estimated Annual Premium	$9,431.00

Endorsement Types

Effective Date of Change * __/__/__

Transaction Description *

Endorsement Types

- ☐ Amend Mailing Address
- ☐ Delete Terrorism Coverage
- ☐ Amend Contractor's Equipment Schedule
- ☐ Add/Delete/Amend Loss Payee (Property)
- ☐ Add/Delete Identity Recovery Coverage
- ☐ Add/Delete/Amend Crisis Response
- ☐ Add/DeleteAmend Loss Payee(Vehicle)
- ☐ Other Changes

- ☐ Amend Pay Plan
- ☐ Amend Premium Basis for GL
- ☐ Add/Delete/Amend Mortgagee(Property)
- ☐ Add/Delete/Amend Add'l Insured (Property)
- ☐ Add/Delete/Amend GreenPac Coverage
- ☐ Add/Delete/Amend Vehicle or Add'l Insured
- ☐ Add 3rd Party Notice to Designated Person(s) or Organization(s)

Cancel   Next ▶

SELECTIVE®
Response is everything.

Add/Delete/Amend Additional Insured (Property)

❑ Click *Complete Form* to access the Additional Insured form.

❑ Enter changes to the Additional Insured(s)

❑ Click **Return to Forms List**, when complete

SELECTIVE®
Response is everything.

Add/Delete/Amend Additional Insured (Property)

❑ Click **Next** or **Review/Issue** to proceed

Add/Delete/Amend Additional Insured (Property)

❑ Review and click **Issue** to complete your endorsement

REVIEW & ISSUE

Account Name & Address	Policy Type	CPP PACKAGE	Year Bus Began	2009
AGT END 4-22 - ALL	Effective Date	05/05/14	Ownership	INDIVIDUAL
41 WANTAGE AVE	Expiration Date	05/05/15	Program Code	Special Contractors
BRANCHVILLE, NJ 078265640	Business Type	CONTRACTORS	SIC Code	174102|MASONRY - OTH
759.627.7034	Nature of Business	BESTINCLASINPUT		

Line of Business	Full Term	Non-Qual Premium	Actual Premium	Coverage Extensions	Mkt Size
Automobile	$4,099.00		no charge	Epac	
General Liability	$3,108.00		no charge	Epac	
Inland Marine	$103.00		no charge		
Property	$2,121.00		no charge		
Total	$9,431.00		no charge		

Premium Total:
$9,431.00

◄ Back   Issue

SELECTIVE
Response is everything.

Technology Training

Add/Delete Identity Recovery Coverage

Add/Delete Identity Recovery Coverage

❑ Click **Endorse** under **Actions**.
   ❑ If **Endorse** is not available, click **More** to access it.

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Insurance Learning Services & Business Services Unit

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Add/Delete Identity Recovery Coverage

- Enter *Effective Date of Change*

- Select **Add/Delete Identity Recovery Coverage**
  - *Transaction Description* will prefill but can be modified

- Click **Next**

Note:
o *Endorsement Types* vary based upon your specific policy
o More than one endorsement can be selected, if needed.

SELECTIVE®
Response is everything.

Add/Delete Identity Recovery Coverage

❑ This screen will display showing the change to the coverage.

❑ Click **Next**

SELECTIVE®
Response is everything.

Add/Delete Identity Recovery Coverage

- When rating is complete, Premium Summary page will display.

- Review and click **Next to Finalize Policy**

- Underwriting Review screen will display
- Click **Next to Forms**

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SELECTIVE®
Response is everything.

Add/Delete Identity Recovery Coverage

□ Review and click **Issue** to complete your endorsement.

REVIEW & ISSUE

Account Name & Address	Policy Type	CPP PACKAGE	Year Bus Began	2009
AGT END 4-22 - ALL	Effective Date	05/05/14	Ownership	INDIVIDUAL
41 WANTAGE AVE	Expiration Date	05/05/15	Program Code	Special Contractors
BRANCHVILLE, NJ 078265640	Business Type	CONTRACTORS	SIC Code	174102|MASONRY - OTH
759.627.7034	Nature of Business	BESTINCLASINPUT		

Line of Business	Full Term	Non-Qual Premium	Actual Premium	Coverage Extensions	Mkt Size
Automobile	$4,099.00		no charge	Epac	
General Liability	$3,108.00		no charge	Epac	
Inland Marine	$103.00		no charge		
Property	$2,105.00		($16.00)		
Total	$9,415.00		($16.00)		

Premium Total:
$9,415.00

‹ Back

Issue

Technology Training

Add/Delete/Amend
GreenPac Coverage

Add/Delete/Amend GreenPac Coverage

❑ Click **Endorse** under **Actions**.
   ❑ If **Endorse** is not available, click **More** to access it.

SELECTIVE®
Response is everything.

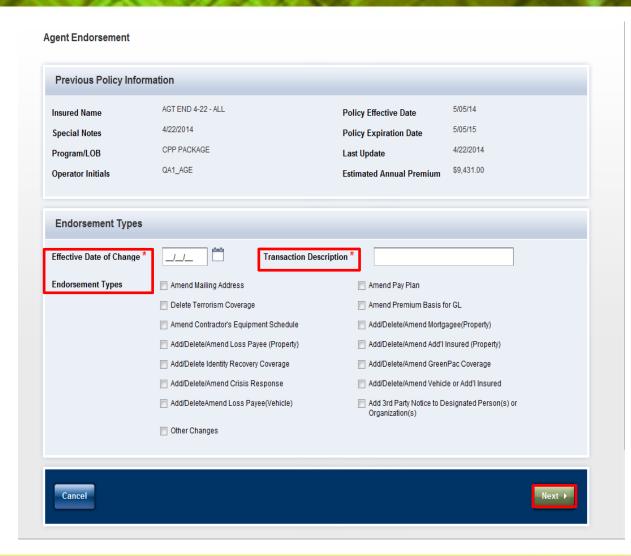# Add/Delete/Amend GreenPac Coverage

- ❑ Enter *Effective Date of Change*

- ❑ Select **Add/Delete/Amend GreenPac Coverage**
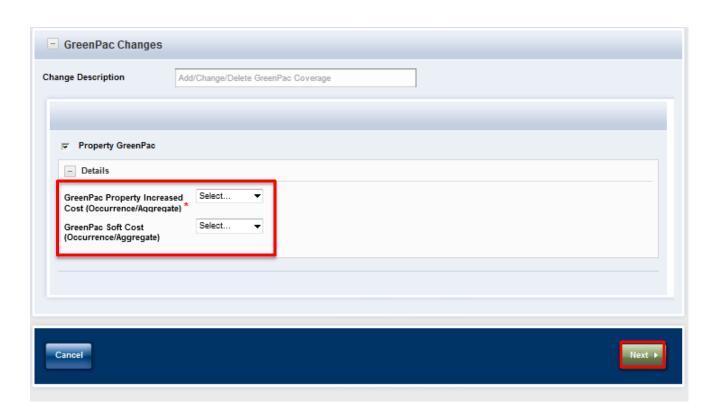 - ❑ *Transaction Description* will prefill but can be modified

- ❑ Click **Next**

Note:

o *Endorsement Types* vary based upon your specific policy

o More than one endorsement can be selected, if needed.

Agent Endorsement

Previous Policy Information

Insured Name	AGT END 4-22 - ALL	Policy Effective Date	5/05/14
Special Notes	4/22/2014	Policy Expiration Date	5/05/15
Program/LOB	CPP PACKAGE	Last Update	4/22/2014
Operator Initials	QA1_AGE	Estimated Annual Premium	$9,431.00

Endorsement Types

Effective Date of Change * __/__/__

Transaction Description *

Endorsement Types

- ☐ Amend Mailing Address
- ☐ Delete Terrorism Coverage
- ☐ Amend Contractor's Equipment Schedule
- ☐ Add/Delete/Amend Loss Payee (Property)
- ☐ Add/Delete Identity Recovery Coverage
- ☐ Add/Delete/Amend Crisis Response
- ☐ Add/DeleteAmend Loss Payee(Vehicle)
- ☐ Other Changes

- ☐ Amend Pay Plan
- ☐ Amend Premium Basis for GL
- ☐ Add/Delete/Amend Mortgagee(Property)
- ☐ Add/Delete/Amend Add'l Insured (Property)
- ☐ Add/Delete/Amend GreenPac Coverage
- ☐ Add/Delete/Amend Vehicle or Add'l Insured
- ☐ Add 3rd Party Notice to Designated Person(s) or Organization(s)

Cancel   Next ▶

Add/Delete/Amend GreenPac Coverage

❑ Complete changes to GreenPac coverage

❑ Click **Next**

Confidential and Proprietary
Insurance Learning Services & Business Services Unit

SELECTIVE®
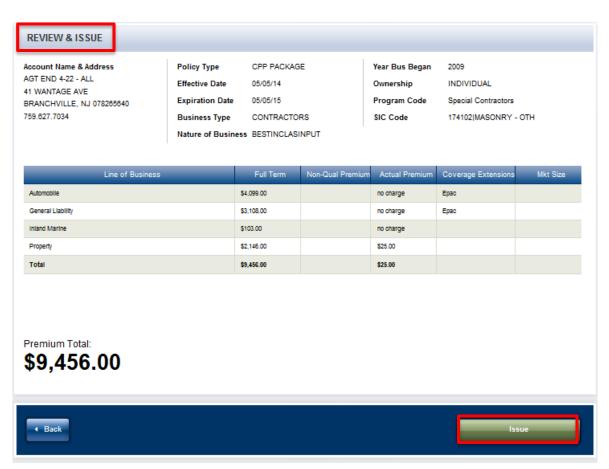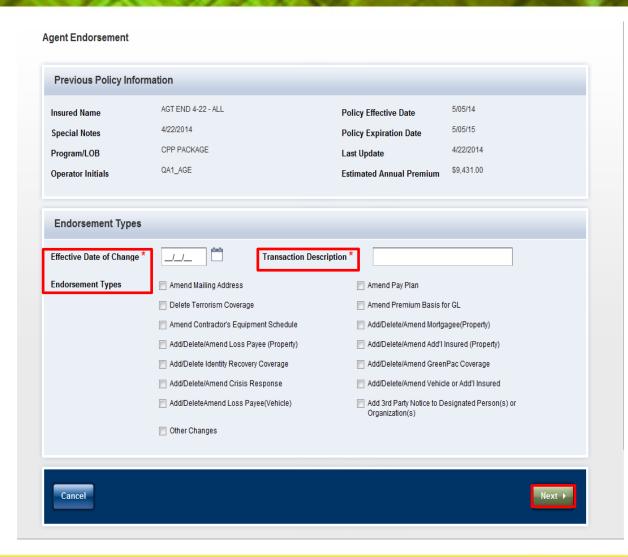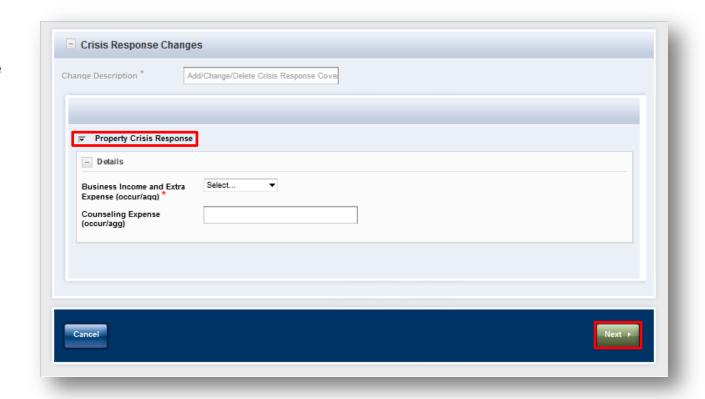Response is everything.

Add/Delete/Amend GreenPac Coverage

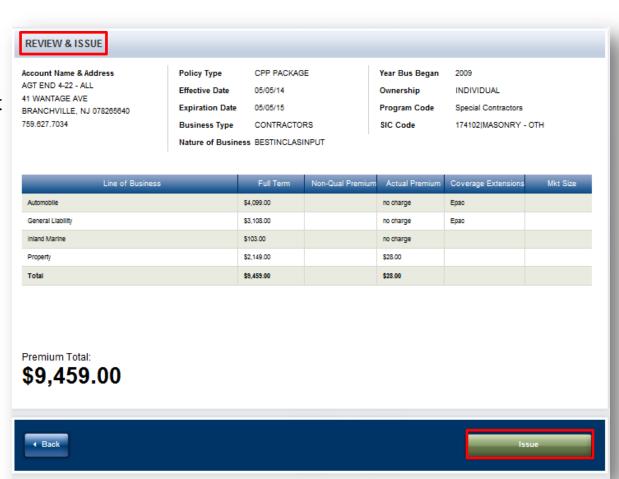☐ When rating is complete, Premium Summary screen will display.

☐ Review and click **Next to Finalize Policy**

☐ Underwriting Review will display

☐ Click **Next to Forms**

SELECTIVE®
Response is everything.

Add/Delete/Amend GreenPac Coverage

❑ Review and click **Issue** to complete your endorsement.

Technology Training

Add/Delete/Amend Crisis Response

SELECTIVE®
Response is everything.

Add/Delete/Amend Crisis Response

❑ Click **Endorse** under **<u>Actions</u>**.
   ❑ If **Endorse** is not available, click **More** to access it.
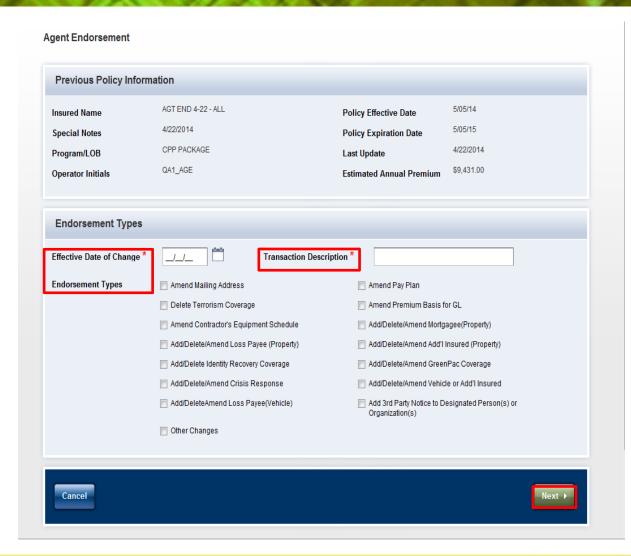
Add/Delete/Amend Crisis Response

- ❑ Enter *Effective Date of Change*

- ❑ Select **Add/Delete/Amend Crisis Response**
  - ❑ *Transaction Description* will prefill but can be modified

- ❑ Click **Next**

Note:

o *Endorsement Types* vary based upon your specific policy

o More than one endorsement can be selected, if needed.

Agent Endorsement

Previous Policy Information

Insured Name	AGT END 4-22 - ALL	Policy Effective Date	5/05/14
Special Notes	4/22/2014	Policy Expiration Date	5/05/15
Program/LOB	CPP PACKAGE	Last Update	4/22/2014
Operator Initials	QA1_AGE	Estimated Annual Premium	$9,431.00

Endorsement Types

Effective Date of Change * ___/___/___

Transaction Description * _____

Endorsement Types

- ☐ Amend Mailing Address
- ☐ Delete Terrorism Coverage
- ☐ Amend Contractor's Equipment Schedule
- ☐ Add/Delete/Amend Loss Payee (Property)
- ☐ Add/Delete Identity Recovery Coverage
- ☐ Add/Delete/Amend Crisis Response
- ☐ Add/DeleteAmend Loss Payee(Vehicle)
- ☐ Other Changes

- ☐ Amend Pay Plan
- ☐ Amend Premium Basis for GL
- ☐ Add/Delete/Amend Mortgagee(Property)
- ☐ Add/Delete/Amend Add'l Insured (Property)
- ☐ Add/Delete/Amend GreenPac Coverage
- ☐ Add/Delete/Amend Vehicle or Add'l Insured
- ☐ Add 3rd Party Notice to Designated Person(s) or Organization(s)

Cancel   **Next ▶**

SELECTIVE®
Response is everything.

Add/Delete/Amend Crisis Response

❑ Complete changes to Crisis Response coverage

❑ Click **Next**

SELECTIVE®
Response is everything.

Add/Delete/Amend Crisis Response

- When rating is complete, Premium Summary screen will display.

- Review and click **Next to Finalize Policy**

- Underwriting Review will display

- Click **Next to Forms**

SELECTIVE®
Response is everything.

Add/Delete/Amend Crisis Response

❑ Review and click **Issue** to complete your endorsement

REVIEW & ISSUE

Account Name & Address	**Policy Type** CPP PACKAGE	**Year Bus Began** 2009
AGT END 4-22 - ALL	**Effective Date** 05/05/14	**Ownership** INDIVIDUAL
41 WANTAGE AVE	**Expiration Date** 05/05/15	**Program Code** Special Contractors
BRANCHVILLE, NJ 078265640	**Business Type** CONTRACTORS	**SIC Code** 174102|MASONRY - OTH
759.627.7034	**Nature of Business** BESTINCLASINPUT	

Line of Business	Full Term	Non-Qual Premium	Actual Premium	Coverage Extensions	Mkt Size
Automobile	$4,099.00		no charge	Epac	
General Liability	$3,108.00		no charge	Epac	
Inland Marine	$103.00		no charge		
Property	$2,149.00		$28.00		
Total	$9,459.00		$28.00		

Premium Total:
$9,459.00

◄ Back   Issue

SELECTIVE®
Response is everything.

Technology Training

Add/Delete/Amend Vehicle or Additional Insured

SELECTIVE®
Response is everything.

Add/Delete/Amend Vehicle or Additional Insured

❑ Click **Endorse** under **Actions**.
    ❑ If **Endorse** is not available, click **More** to access it.

Confidential and Proprietary
Insurance Learning Services & Business Services Unit
SELECTIVE®
Response is everything.

Add/Delete/Amend Vehicle or Additional Insured

- Enter *Effective Date of Change*

- Select **Add/Delete/Amend Vehicle or Additional Insured**
  - *Transaction Description* will prefill but can be modified

- Click **Next**

Note:

o *Endorsement Types* vary based upon your specific policy

o More than one endorsement can be selected, if needed.

Agent Endorsement

Previous Policy Information

Insured Name	AGT END 4-22 - ALL	Policy Effective Date	5/05/14
Special Notes	4/22/2014	Policy Expiration Date	5/05/15
Program/LOB	CPP PACKAGE	Last Update	4/22/2014
Operator Initials	QA1_AGE	Estimated Annual Premium	$9,431.00

Endorsement Types

Effective Date of Change * __/__/__

Transaction Description *

Endorsement Types

- ☐ Amend Mailing Address
- ☐ Delete Terrorism Coverage
- ☐ Amend Contractor's Equipment Schedule
- ☐ Add/Delete/Amend Loss Payee (Property)
- ☐ Add/Delete Identity Recovery Coverage
- ☐ Add/Delete/Amend Crisis Response
- ☐ Add/DeleteAmend Loss Payee(Vehicle)
- ☐ Amend Pay Plan
- ☐ Amend Premium Basis for GL
- ☐ Add/Delete/Amend Mortgagee(Property)
- ☐ Add/Delete/Amend Add'l Insured (Property)
- ☐ Add/Delete/Amend GreenPac Coverage
- ☐ Add/Delete/Amend Vehicle or Add'l Insured
- ☐ Add 3rd Party Notice to Designated Person(s) or Organization(s)
- ☐ Other Changes

Cancel

Next ▶

Add/Delete/Amend Vehicle or Additional Insured

Make the needed changes to the Auto Line of Business.

Delete:

❑ To delete an existing vehicle, click Delete under Actions.

Amend:

❑ To edit an existing vehicle, click Edit under Action.

   ❑ The following feature can be **amended** on an existing vehicle:

      ❑ VIN, whether it's a leased vehicle or not

❑ When you are finished, click Rate

Add:

To add a vehicle to the policy, click Add Vehicle

SELECTIVE®
Response is everything.

Add/Delete/Amend Vehicle or Additional Insured

- ❑ Enter the information for the vehicle you are *adding*

- ❑ Click *Copy Vehicle Information* to copy the following features from an existing vehicle.
  - ❑ Vehicle and Coverages
  - ❑ City Only
  - ❑ City and Coverages
  - ❑ All of the above

- ❑ Click **Next** to proceed

SELECTIVE®
Response is everything.

Add/Delete/Amend Vehicle or Additional Insured

2 options for entering Class Code:

1. Select *Enter and Validate Class Code*

❑ Enter Class Code and click *Validate Class Code*

OR

2. Select *Generate Class Code*

❑ Answer questions on screen

❑ Click Generate Class Code

❑ Select **Next** to proceed

SELECTIVE®
Response is everything.

Add/Delete/Amend Vehicle or Additional Insured

❑ Select *Vehicle Coverages* for the newly added vehicle(s).

❑ Click **Rate** to proceed.

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SELECTIVE®
Response is everything.

Add/Delete/Amend Vehicle or Additional Insured

☐ When rating is complete, Premium Summary screen will display.

☐ Review and click **Next to Finalize Policy**

☐ Underwriting Review will display

☐ Click **Print Auto ID Cards**

SELECTIVE®
Response is everything.

Add/Delete/Amend Vehicle or Additional Insured

❑ Under **Print Type** leave defaulted to **All Vehicles** or chose **Selected Vehicles** to have vehicle summary display.

❑ Click **Print/Return to Finalize** Review.

Add/Delete/Amend Vehicle or Additional Insured

- ❑ Click *Complete Form* to access Dec Page where you will add, delete or amend Loss Payee(s).

- ❑ Click *View Named Interests*
  - ❑ You can edit existing Named Interests by clicking on the name

- ❑ Enter Loss Payee information.
- ❑ Click **Return** button when complete.

Note:

- • Use *Add Name* to enter additional loss payee(s).

- • Use *Copy Names* to copy information from an existing Named Interest.

- • Click ADD VEHICLE(S) to associate loss payee to vehicle

Add/Delete/Amend Vehicle or Additional Insured

❑ Click **Next** or **Review/Issue** to proceed

SELECTIVE®
Response is everything.

Add/Delete/Amend Vehicle or Additional Insured

❑ Review and click **Issue** to complete your endorsement.

Insurance Learning Services & Business Services Unit

SELECTIVE®
Response is everything.

Technology Training

Add/Delete/Amend Loss Payee (Vehicle)

SELECTIVE®
Response is everything.

Add/Delete/Amend Loss Payee (Vehicle)

❑ Click **Endorse** under **Actions**.
　❑ If **Endorse** is not available, click **More** to access it.

Add/Delete/Amend Loss Payee (Vehicle)

- ❑ Enter *Effective Date of Change*

- ❑ Select **Add/Delete/Amend Loss Payee (Vehicle)**
  - ❑ *Transaction Description* will prefill but can be modified

- ❑ Click **Next**

Note:

- o *Endorsement Types* vary based upon your specific policy
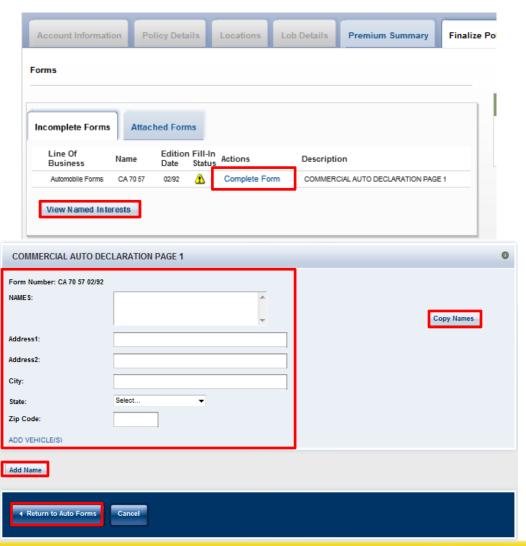- o More than one endorsement can be selected, if needed.

Agent Endorsement

Previous Policy Information

Insured Name	AGT END 4-22 - ALL	Policy Effective Date	5/05/14
Special Notes	4/22/2014	Policy Expiration Date	5/05/15
Program/LOB	CPP PACKAGE	Last Update	4/22/2014
Operator Initials	QA1_AGE	Estimated Annual Premium	$9,431.00

Endorsement Types

Effective Date of Change *   __/__/__

Transaction Description *

Endorsement Types

- ☐ Amend Mailing Address
- ☐ Delete Terrorism Coverage
- ☐ Amend Contractor's Equipment Schedule
- ☐ Add/Delete/Amend Loss Payee (Property)
- ☐ Add/Delete Identity Recovery Coverage
- ☐ Add/Delete/Amend Crisis Response
- ☐ Add/DeleteAmend Loss Payee(Vehicle)
- ☐ Other Changes

- ☐ Amend Pay Plan
- ☐ Amend Premium Basis for GL
- ☐ Add/Delete/Amend Mortgagee(Property)
- ☐ Add/Delete/Amend Add'l Insured (Property)
- ☐ Add/Delete/Amend GreenPac Coverage
- ☐ Add/Delete/Amend Vehicle or Add'l Insured
- ☐ Add 3rd Party Notice to Designated Person(s) or Organization(s)

Cancel

Next ▶

SELECTIVE®
Response is everything.

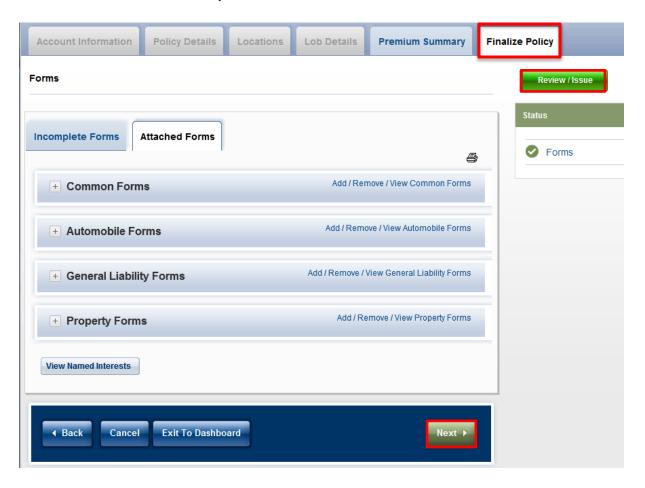# Add/Delete/Amend Loss Payee (Vehicle)

❑ Click *Complete Form* to access Dec Page where you will add, delete or amend Loss Payee(s).

❑ Click *View Named Interests*
  ❑ You can edit existing Named Interests by clicking on the name

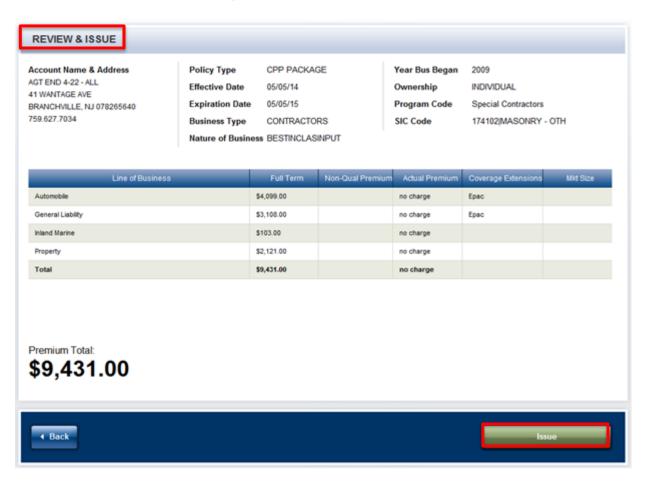❑ Enter Loss Payee information.

❑ Click **Return** button when complete.

Note:

• Use *Add Name* to enter additional loss payee(s).

• Use *Copy Names* to copy information from an existing Named Interest.

SELECTIVE
Response is everything.

Add/Delete/Amend Loss Payee (Vehicle)

❑ Click **Next** or **Review/Issue** to proceed

SELECTIVE®
Response is everything.

Add/Delete/Amend Loss Payee (Vehicle)

❑ Review and click **Issue** to complete your endorsement.

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SELECTIVE®
Response is everything.

Technology Training

Add 3rd Party Notice to Designated Persons or Organizations

SELECTIVE®
Response is everything.

Add 3rd Party Notice to Designated Persons or Organizations

❑ Click **Endorse** under **Actions**.
  ❑ If **Endorse** is not available, click **More** to access it.

SELECTIVE®
Response is everything.

Add 3rd Party Notice to Designated Persons or Organizations

- ❑ Enter *Effective Date of Change*

- ❑ Select **Add 3rd Party Notice to Designated Persons or Organizations**
  - ❑ *Transaction Description* will prefill but can be modified

- ❑ Click **Next**

Note:
- o *Endorsement Types* vary based upon your specific policy
- o More than one endorsement can be selected, if needed.

Agent Endorsement

Previous Policy Information

Insured Name	AGT END 4-22 - ALL	Policy Effective Date	5/05/14
Special Notes	4/22/2014	Policy Expiration Date	5/05/15
Program/LOB	CPP PACKAGE	Last Update	4/22/2014
Operator Initials	QA1_AGE	Estimated Annual Premium	$9,431.00

Endorsement Types

Effective Date of Change *   __/__/__

Transaction Description *

Endorsement Types

- ☐ Amend Mailing Address
- ☐ Delete Terrorism Coverage
- ☐ Amend Contractor's Equipment Schedule
- ☐ Add/Delete/Amend Loss Payee (Property)
- ☐ Add/Delete Identity Recovery Coverage
- ☐ Add/Delete/Amend Crisis Response
- ☐ Add/DeleteAmend Loss Payee(Vehicle)
- ☐ Other Changes

- ☐ Amend Pay Plan
- ☐ Amend Premium Basis for GL
- ☐ Add/Delete/Amend Mortgagee(Property)
- ☐ Add/Delete/Amend Add'l Insured (Property)
- ☐ Add/Delete/Amend GreenPac Coverage
- ☐ Add/Delete/Amend Vehicle or Add'l Insured
- ☐ Add 3rd Party Notice to Designated Person(s) or Organization(s)

Cancel

Next ▶

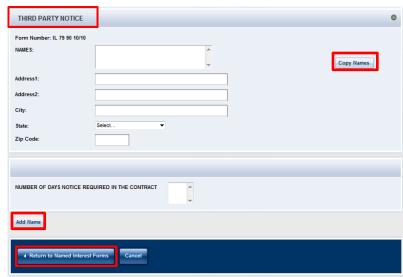# Add 3ʳᵈ Party Notice to Designated Persons or Organizations
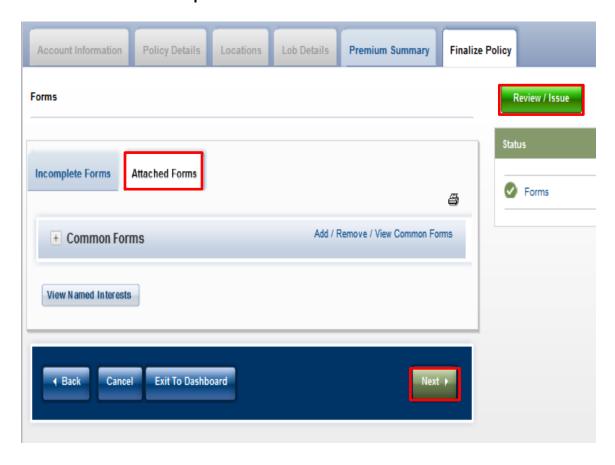
❑ Click *Complete Form* to access the form.

❑ Enter the information for the Designated Persons or Organizations.
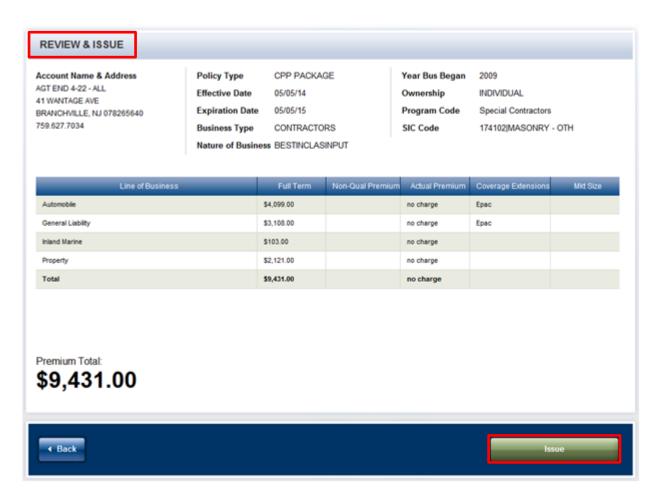
❑ Click **Return** when complete

Note:
• Use *Add Name* to enter additional Designated Persons or Organizations.
• Use *Copy Names* to copy information from a named interest already on the policy.

SELECTIVE®
Response is everything.

Add 3rd Party Notice to Designated Persons or Organizations

❑ Click **Next** or **Review/Issue** to proceed

SELECTIVE®
Response is everything.

Add 3rd Party Notice to Designated Persons or Organizations

❑ Review and click **Issue** to complete your endorsement.

SELECTIVE®
Response is everything.

Technology Training

Amend WC Premium Basis

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Insurance Learning Services & Business Services Unit

SELECTIVE®
Response is everything.

Amend WC Premium Basis

❑ Click **Endorse** under <u>**Actions**</u>.
    ❑ If **Endorse** is not available, click **More** to access it.

Amend WC Premium Basis

- ❑ Effective Date of Change prefills with Policy Effective Date.

- ❑ Select **Amend WC Premium Basis**
  - ❑ *Transaction Description* will prefill but can be modified

- ❑ Click **Next**

Note:
- o *Endorsement Types* vary based upon your specific policy
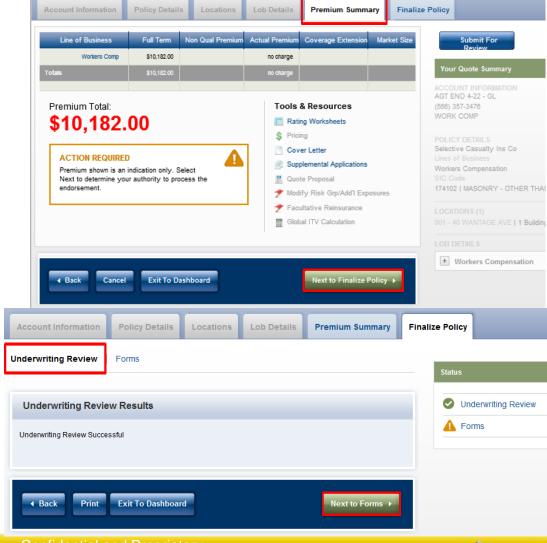- o More than one endorsement can be selected, if needed.

Agent Endorsement

Previous Policy Information

Insured Name	AGT END 4-22 - GL	Policy Effective Date	5/05/14
Special Notes	4/22/2014	Policy Expiration Date	5/05/15
Program/LOB	WORK COMP	Last Update	4/22/2014
Operator Initials	QA1_AGE	Estimated Annual Premium	$10,182.00

Endorsement Types

Effective Date of Change *   05/05/14   Transaction Description *   AMEND PREMIUM BASIS FOR WC

Endorsement Types
- ☐ Amend Mailing Address   ☐ Amend Pay Plan
- ☑ Amend Premium Basis for WC   ☐ Add 3rd Party Notice to Designated Person(s) or Organization(s)
- ☐ Other Changes

– Premium Basis Changes for WC

Change Description *   Amend Premium Basis for WC

Cancel   Next ▶

SELECTIVE
Response is everything.

Amend WC Premium Basis

❑ Click **Edit** to amend the WC Premium Basis.

❑ Click **Rate** to proceed.

SELECTIVE
Response is everything.

Amend WC Premium Basis

□ When rating is complete, **Premium Summary** page will display

□ Click **Next to Finalize Policy**

□ Underwriting Review will display.
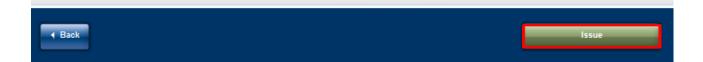
□ Click **Next to Forms**

SELECTIVE®
Response is everything.

Amend WC Premium Basis

❑ Review and click **Issue** to complete your endorsement.

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SELECTIVE®
Response is everything.

Technology Training

Other Changes

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SELECTIVE®
Response is everything.

Other Changes

❑ Click **Endorse** under **<u>Actions</u>**.

    ❑ If **Endorse** is not available, click **More** to access it.

SELECTIVE®
Response is everything.

Other Changes

❑ Enter *Effective Date of Change*

❑ Select **Other Changes**
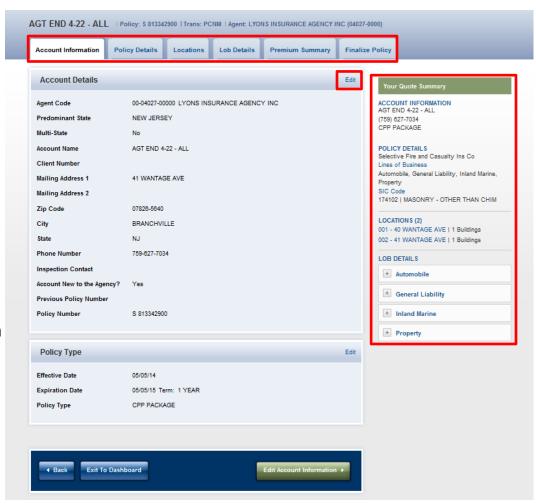   ❑ *Transaction Description* will prefill but can be modified

❑ Click **Next**

Note:

o This endorsement type allows you to make multiple changes to the policy. However, the endorsement must be *reviewed* and *issued* by your underwriter.

SELECTIVE®
Response is everything.

Other Changes

- ❑ Click **Edit** to make changes to the policy
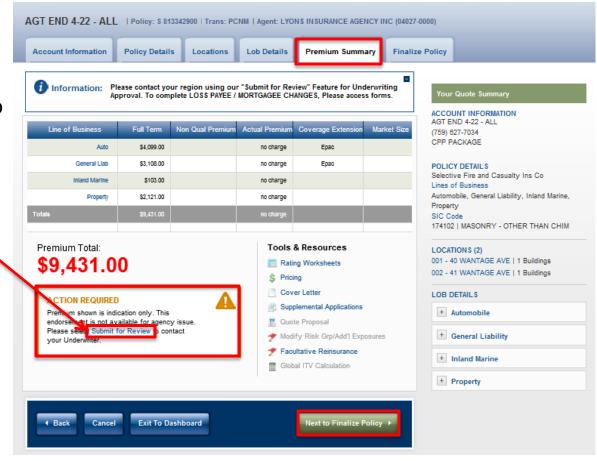- ❑ When your changes are complete, click **Rate**.

Note:

- o There are multiple ways to navigate throughout the policy
  - o Use **Next** flow at bottom left of screen
  - o Use **tabs** along the top of the page
  - o Use the blue links within the **Quote Summary** along the right side of screen
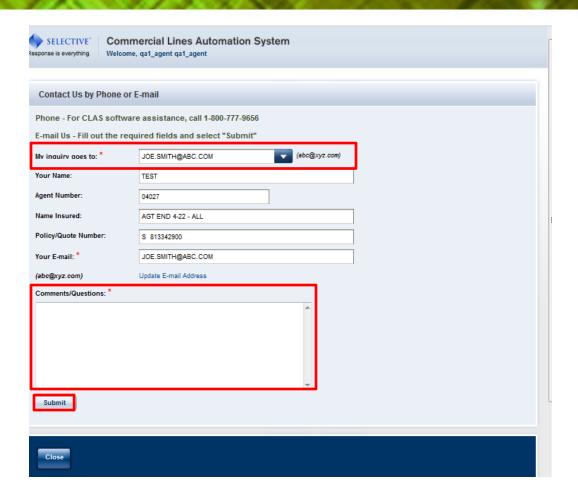
Other Changes

- When rating is complete, *Premium Summary* page will display.

- Click **Next to Finalize Policy** to complete any forms such as *Loss Payee/Mortgagee Changes, Etc.*

- Click **Submit for Review** link within Action Required box

Note:

Changes requested with **Other Changes** must be submitted to your underwriter for review and issuance.

SELECTIVE
Response is everything.

Other Changes

- ❑ Enter email address for your underwriter
  - ❑ Your quote information will prefill
- ❑ Enter Comments or Questions for your underwriter
- ❑ Click **Submit** to send to your underwriter

Technology Training

Issue Multiple Changes in One Transaction

v2.0, 07.10.15

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Insurance Learning Services & Business Services Unit

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Issue Multiple Changes in One Transaction

❑ Click **Endorse** under **Actions**.
   ❑ If **Endorse** is not available, click **More** to access it.

v2.0, 07.10.15
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Insurance Learning Services & Business Services Unit
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SELECTIVE®
Response is everything.
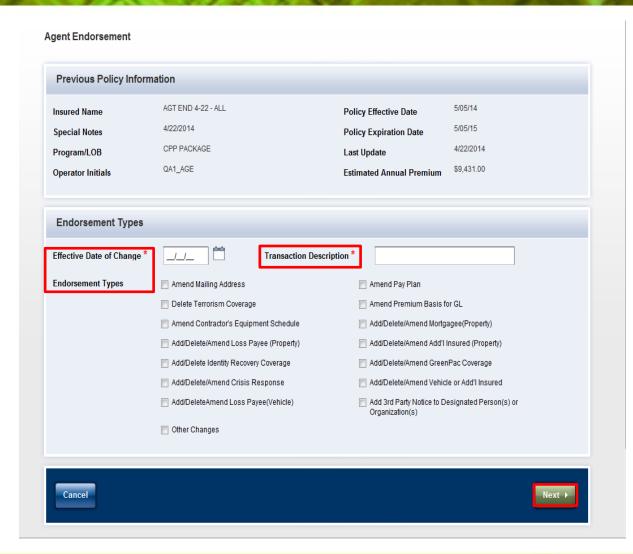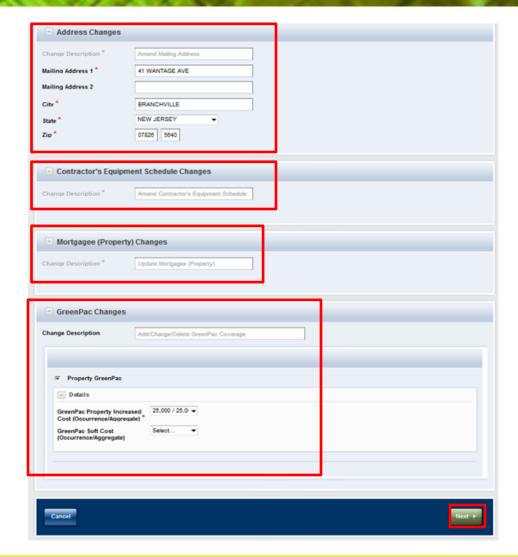
Issue Multiple Changes in One Transaction

- Enter *Effective Date of Change*

- Select the needed endorsements types
  - *Transaction Description* will prefill but can be modified
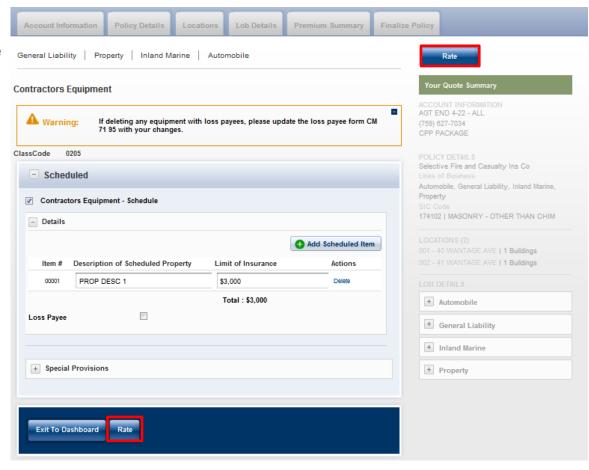
- Click **Next**

Note:

o Endorsement Types vary based upon your specific policy and endorsements types selected.

Agent Endorsement

Previous Policy Information

Insured Name	AGT END 4-22 - ALL	Policy Effective Date	5/05/14
Special Notes	4/22/2014	Policy Expiration Date	5/05/15
Program/LOB	CPP PACKAGE	Last Update	4/22/2014
Operator Initials	QA1_AGE	Estimated Annual Premium	$9,431.00

Endorsement Types

Effective Date of Change * __/__/__

Transaction Description *

Endorsement Types

- ☐ Amend Mailing Address
- ☐ Delete Terrorism Coverage
- ☐ Amend Contractor's Equipment Schedule
- ☐ Add/Delete/Amend Loss Payee (Property)
- ☐ Add/Delete Identity Recovery Coverage
- ☐ Add/Delete/Amend Crisis Response
- ☐ Add/DeleteAmend Loss Payee(Vehicle)
- ☐ Other Changes

- ☐ Amend Pay Plan
- ☐ Amend Premium Basis for GL
- ☐ Add/Delete/Amend Mortgagee(Property)
- ☐ Add/Delete/Amend Add'l Insured (Property)
- ☐ Add/Delete/Amend GreenPac Coverage
- ☐ Add/Delete/Amend Vehicle or Add'l Insured
- ☐ Add 3rd Party Notice to Designated Person(s) or Organization(s)

Cancel

Next ▶

v2.0, 07.10.15

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SELECTIVE®
Response is everything.

Issue Multiple Changes in One Transaction

❏ A section will appear for each endorsement type selected.

❏ Enter applicable information.

❏ Click **Next** to proceed.

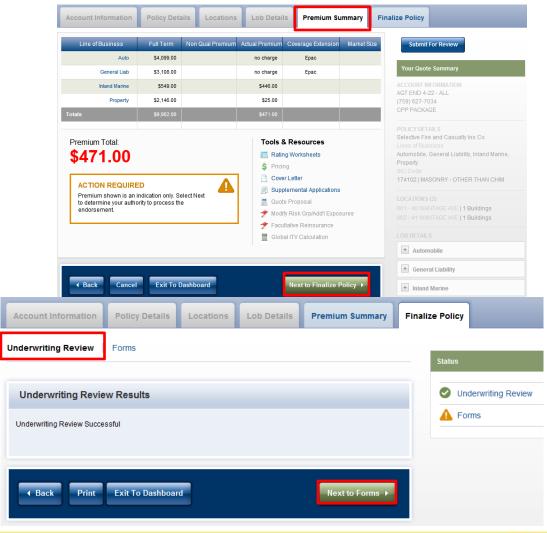# Issue Multiple Changes in One Transaction

❑ The system will guide you to the screens that require completion for the endorsement types selected.

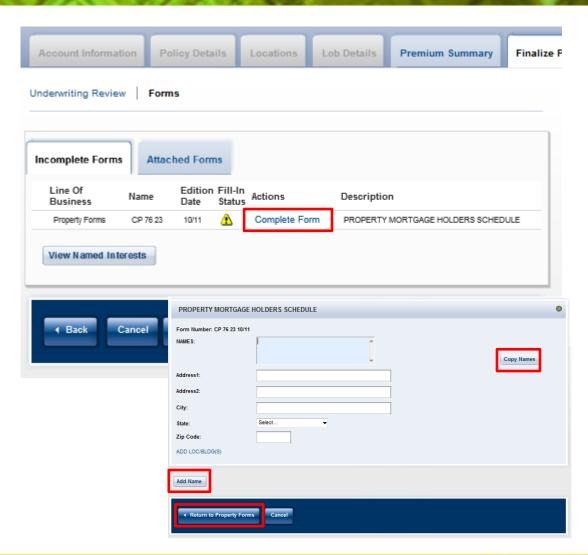❑ Click **Rate** when your changes are complete.

SELECTIVE®
Response is everything.

Issue Multiple Changes in One Transaction

- When rating is complete, **Premium Summary** page will display

- Click **Next to Finalize Policy**

- Underwriting Review will display.

- Click **Next to Forms**

SELECTIVE®
Response is everything.
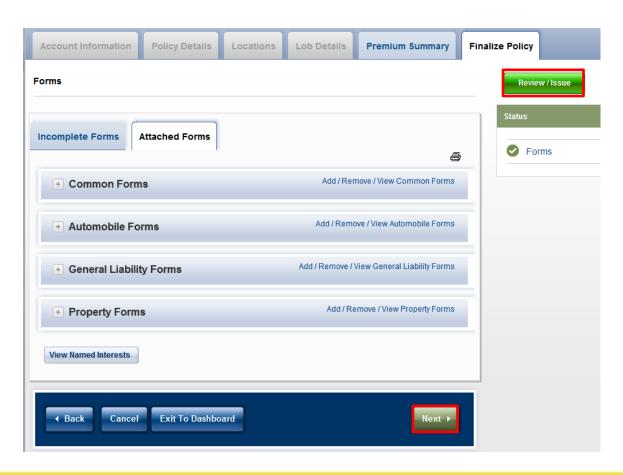
Issue Multiple Changes in One Transaction

- ❑ Click *Complete Form* to access forms related to changes requested.
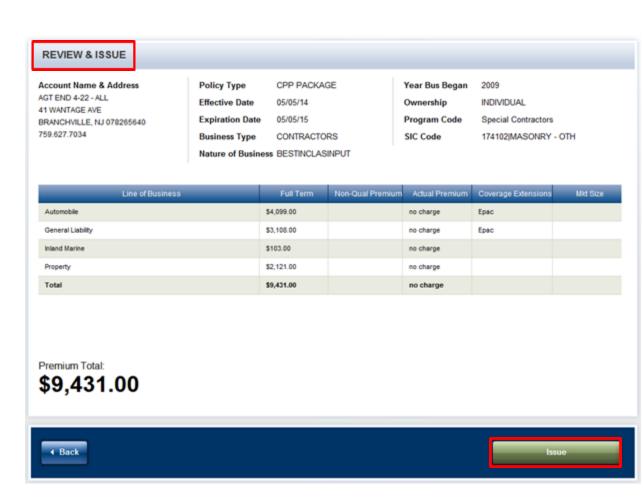- ❑ Click **Return** when complete.

Note:

- Use *Add Name* to enter additional mortgagees
- Use *Copy Names* to copy information from a named interest already on the policy.
- Use ADD LOC/BLDG(S) to attach mortgagee to location/building

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Response is everything.

Issue Multiple Changes in One Transaction

❑ Click **Next** or **Review/Issue** to proceed

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Issue Multiple Changes in One Transaction

❑ Review and click **Issue** to complete your endorsement

REVIEW & ISSUE

Account Name & Address	Policy Type	CPP PACKAGE	Year Bus Began	2009
AGT END 4-22 - ALL	Effective Date	05/05/14	Ownership	INDIVIDUAL
41 WANTAGE AVE	Expiration Date	05/05/15	Program Code	Special Contractors
BRANCHVILLE, NJ 078265640	Business Type	CONTRACTORS	SIC Code	174102JMASONRY - OTH
759.627.7034	Nature of Business	BESTINCLASINPUT		

Line of Business	Full Term	Non-Qual Premium	Actual Premium	Coverage Extensions	Mkt Size
Automobile	$4,099.00		no charge	Epac	
General Liability	$3,108.00		no charge	Epac	
Inland Marine	$103.00		no charge		
Property	$2,121.00		no charge		
Total	$9,431.00		no charge		

Premium Total:
$9,431.00

◂ Back   Issue

For further assistance, please contact us: 800.777.9656, option 3 or BSUTechnicalSupport@selective.com.

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