

# Technology Training

## Commercial Lines: Basic Endorsements (CPP and WC)

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# Technology Training

## Amend Mailing Address

# Amend Mailing Address

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

Latest Transactions

Info	Account Name	Policy No.	Quote	Policy Type	Status	Effective	Expiration	Actions
	AGT END 4-22 - ALL	S 8133429-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	<a href="#" style="background-color: yellow; border: 2px solid red; padding: 2px;">Endorse</a> <a href="#">Renewal</a>   <a href="#">View</a>   <a href="#">More</a>

Latest Transactions

Info	Account Name	Policy No.	Quote	Policy Type	Status	Effective	Expiration	Actions
	AGT END 4-22 - ALL	S 8133429-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	<a href="#">View</a>   <a href="#">More</a>
	AGT END 4-22 - GL	S 8133424-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	<a href="#">Endorse</a>
	AGT END 4-22 - GL	WC 2503964-00		WORK COMP	ISSUED	05/05/2014	05/05/2015	<a href="#">Renewal</a>
	AGT END 4-22 - MULTI	S 8133428-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	<a href="#">Renewal</a>
	AGT END FLOW - CPP	S 8132667-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	<a href="#">Endorse</a>

[Renewal \(Quote\)](#)

[Endorse](#)

[Policy Notepad](#)

[Auto ID Cards](#)

[Create New Submission](#)

[Agency Download](#)

# 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

☐ Amend Pay Plan

☐ Delete Terrorism Coverage

☐ Amend Premium Basis for GL

☐ Amend Contractor's Equipment Schedule

☐ Add/Delete/Amend Mortgagee(Property)

☐ Add/Delete/Amend Loss Payee (Property)

☐ Add/Delete/Amend Add'l Insured (Property)

☐ Add/Delete Identity Recovery Coverage

☐ Add/Delete/Amend GreenPac Coverage

☐ Add/Delete/Amend Crisis Response

☐ Add/Delete/Amend Vehicle or Add'l Insured

☐ Add/Delete/Amend Loss Payee(Vehicle)

☐ 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 \*

07828 5540

Cancel

Next



# Amend Mailing Address

- ❑ 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** 174102MASONRY - 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		
<b>Total</b>	<b>\$9,431.00</b>		no charge		

Premium Total:  
**\$9,431.00**

[← Back](#)[Issue](#)

# Technology Training

## Amend Pay Plan



# Amend Pay Plan

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

<div> <div>Latest Transactions</div> <div> Search Name Insured <input type="text"/> <input type="button" value="Q"/> </div> <div>Get a Quote ▶</div> </div>								
Info	Account Name	Policy No.	Quote	Policy Type	Status	Effective	Expiration	Actions
	AGT END 4-22 - ALL	S 8133429-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	<div>Endorse</div> <div>Renewal   View   More ▼</div>

<div> <div>Latest Transactions</div> <div> Search Name Insured <input type="text"/> <input type="button" value="Q"/> </div> <div>Get a Quote ▶</div> </div>								
Info	Account Name	Policy No.	Quote	Policy Type	Status	Effective	Expiration	Actions
	AGT END 4-22 - ALL	S 8133429-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	<div>View</div> <div>More ▼</div>
	AGT END 4-22 - GL	S 8133424-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	<div>Endorse</div> <div>Renewal (Quote)</div> <div>Policy Notepad</div> <div>Auto ID Cards</div> <div>Create New Submission</div> <div>Agency Download</div>
	AGT END 4-22 - GL	WC 2503964-00		WORK COMP	ISSUED	05/05/2014	05/05/2015	<div>Renewal</div> <div>Endorse</div>
	AGT END 4-22 - MULTI	S 8133428-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	<div>Renewal</div> <div>Endorse</div>
	AGT END FLOW - CPP	S 8132667-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	<div>Endorse</div> <div>Renewal</div>

# 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:**
- *Endorsement Types* vary based upon your specific policy
  - Pay Plan changes cannot be combined with other endorsement changes.

## 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	5/5/2014
Operator Initials	QA1_AGE	Estimated Annual Premium	\$9,431.00

  

Endorsement Types	
Effective Date of Change *	05/05/14
Transaction Description *	AMEND PAY PLAN
Endorsement Types	<input checked="" type="checkbox"/> Amend Pay Plan
	<input type="checkbox"/> Amend Mailing Address
	<input type="checkbox"/> Delete Terrorism Coverage
	<input type="checkbox"/> Amend Contractor's Equipment Schedule
	<input type="checkbox"/> Add/Delete/Amend Loss Payee (Property)
	<input type="checkbox"/> Add/Delete/Amend Identity Recovery Coverage
	<input type="checkbox"/> Add/Delete/Amend Crisis Response
	<input type="checkbox"/> Add/Delete/Amend Loss Payee(Vehicle)
	<input type="checkbox"/> Other Changes
	<input type="checkbox"/> Amend Premium Basis for GL
	<input type="checkbox"/> Add/Delete/Amend Mortgagee(Property)
	<input type="checkbox"/> Add/Delete/Amend Add'l Insured (Property)
	<input type="checkbox"/> Add/Delete/Amend GreenPac Coverage
	<input type="checkbox"/> Add/Delete/Amend Vehicle or Add'l Insured
	<input type="checkbox"/> Add 3rd Party Notice to Designated Person(s) or Organization(s)

  

Payment Plan Change	
Change Description *	Amend Pay Plan
Bill Plan	Direct Bill
Payment Plan	2 PAY

Cancel Next

# 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** 174102MASONRY - 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		
<b>Total</b>	<b>\$9,431.00</b>		<b>no charge</b>		

Premium Total:  
**\$9,431.00**

← Back

Issue



# Technology Training

## Delete Terrorism Coverage

# Delete Terrorism Coverage

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

Latest Transactions

Info	Account Name	Policy No.	Quote	Policy Type	Status	Effective	Expiration	Actions
	AGT END 4-22 - ALL	S 8133429-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	<a href="#" style="background-color: yellow; border: 2px solid red; padding: 2px;">Endorse</a> <a href="#">Renewal</a>   <a href="#">View</a>   <a href="#">More</a>

Latest Transactions

Info	Account Name	Policy No.	Quote	Policy Type	Status	Effective	Expiration	Actions
	AGT END 4-22 - ALL	S 8133429-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	<a href="#">View</a>   <a href="#">More</a>
	AGT END 4-22 - GL	S 8133424-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	<a href="#">Endorse</a>
	AGT END 4-22 - GL	WC 2503964-00		WORK COMP	ISSUED	05/05/2014	05/05/2015	<a href="#">Renewal</a>
	AGT END 4-22 - MULTI	S 8133428-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	<a href="#">Renewal</a>
	AGT END FLOW - CPP	S 8132667-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	<a href="#">Endorse</a>

More ▾

[Renewal \(Quote\)](#)  
[Endorse](#)  
[Policy Notepad](#)  
[Auto ID Cards](#)  
[Create New Submission](#)  
[Agency Download](#)

# 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	
<b>Effective Date of Change *</b> Endorsement Types	<b>Transaction Description *</b>
<input type="checkbox"/> Amend Mailing Address	
<input type="checkbox"/> Delete Terrorism Coverage	
<input type="checkbox"/> Amend Contractor's Equipment Schedule	
<input type="checkbox"/> Add/Delete/Amend Loss Payee (Property)	
<input type="checkbox"/> Add/Delete Identity Recovery Coverage	
<input type="checkbox"/> Add/Delete/Amend Crisis Response	
<input type="checkbox"/> Add/Delete/Amend Loss Payee(Vehicle)	
<input type="checkbox"/> Other Changes	
<input type="checkbox"/> Amend Pay Plan	
<input type="checkbox"/> Amend Premium Basis for GL	
<input type="checkbox"/> Add/Delete/Amend Mortgagee(Property)	
<input type="checkbox"/> Add/Delete/Amend Add'l Insured (Property)	
<input type="checkbox"/> Add/Delete/Amend GreenPac Coverage	
<input type="checkbox"/> Add/Delete/Amend Vehicle or Add'l Insured	
<input type="checkbox"/> Add 3rd Party Notice to Designated Person(s) or Organization(s)	

Cancel Next >



# 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:

- Terrorism can only be excluded if the signed Terrorism Coverage Rejection Form has been completed by the insured.
- *Endorsement Types* vary based upon your specific policy
- More than one endorsement can be selected, if needed.

Response is everything. Welcome, qa1\_agent qa1\_agent

Agent Endorsement

**Information:** Terrorism may only be excluded if the signed Terrorism Coverage Rejection Form has been received from the Insured.

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 \*** DELETE TERRORISM COVERAGE

**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/Delete/Amend 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)

☐ **Terrorism Changes**

Change Description \* Delete Terrorism Coverage

Delete Terrorism ☒

Cancel Next

# Delete Terrorism Coverage

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

Account Information

Policy Details

Locations

LOB Details

Premium Summary

Finalize Policy

Line of Business	Full Term	Non Qual Premium	Actual Premium	Coverage Extension	Market Size
Auto	\$4,018.00		(\$81.00)	Epac	
General Liab	\$3,047.00		(\$61.00)	Epac	
Inland Marine	\$101.00		(\$2.00)		
Property	\$2,092.00		(\$29.00)		
Totals	\$9,258.00		(\$173.00)		

Premium Total:  
(\$173.00)

ACTION REQUIRED

Premium shown is an indication only. Select Next to determine your authority to process the endorsement.

Tools & Resources

Rating Worksheets

Pricing

Cover Letter

Supplemental Applications

Quote Proposal

Modify Risk Grp/Add'l Exposures

Facultative Reinsurance

Global ITV Calculation

Back

Cancel

Exit To Dashboard

Next to Finalize Policy

Your Quote Summary

ACCOUNT INFORMATION  
AGT END 4-22 - ALL  
(759) 627-7034  
CPP PACKAGE

POLICY DETAILS  
Selective Fire and Casualty Ins Co  
Lines of Business  
Automobile, General Liability, Inland Marine, Property  
SIC Code  
174102 | MASONRY - OTHER THAN CHIM

LOCATIONS (2)  
001 - 40 WANTAGE AVE | 1 Buildings  
002 - 41 WANTAGE AVE | 1 Buildings

LOB DETAILS  

Automobile

General Liability

Inland Marine

Property

# Delete Terrorism Coverage

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

**REVIEW & ISSUE**

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

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

Premium Total:  
**\$9,258.00**

← Back

Issue



# Technology Training

## Amend GL Premium Basis

# Amend GL Premium Basis

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

Latest Transactions									Get a Quote ▶	
Search		Name Insured								
Info	Account Name	Policy No.	Quote	Policy Type	Status	Effective	Expiration	Actions		
	AGT END 4-22 - ALL	S 8133429-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	<b>Endorse</b>   Renewal   View   More ▼		

Latest Transactions									Get a Quote ▶	
Search		Name Insured								
Info	Account Name	Policy No.	Quote	Policy Type	Status	Effective	Expiration	Actions		
	AGT END 4-22 - ALL	S 8133429-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	View   More ▼		
	AGT END 4-22 - GL	S 8133424-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	Endorse   Renewal (Quote)   Policy Notepad   Auto ID Cards   Create New Submission   Agency Download		
	AGT END 4-22 - GL	WC 2503964-00		WORK COMP	ISSUED	05/05/2014	05/05/2015	Renewal   Endorse   Policy Notepad   Auto ID Cards   Create New Submission   Agency Download		
	AGT END 4-22 - MULTI	S 8133428-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	Renewal   Endorse   Policy Notepad   Auto ID Cards   Create New Submission   Agency Download		
	AGT END FLOW - CPP	S 8132667-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	Endorse   Renewal (Quote)   Policy Notepad   Auto ID Cards   Create New Submission   Agency Download		

# 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.

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	
<b>Effective Date of Change *</b>	<input type="text" value="__/__/__"/> <input type="button" value="Help"/>
<b>Transaction Description *</b>	<input type="text"/>
<b>Endorsement Types</b>	
<input type="checkbox"/> Amend Mailing Address	<input type="checkbox"/> Amend Pay Plan
<input type="checkbox"/> Delete Terrorism Coverage	<input type="checkbox"/> Amend Premium Basis for GL
<input type="checkbox"/> Amend Contractor's Equipment Schedule	<input type="checkbox"/> Add/Delete/Amend Mortgagee(Property)
<input type="checkbox"/> Add/Delete/Amend Loss Payee (Property)	<input type="checkbox"/> Add/Delete/Amend Add'l Insured (Property)
<input type="checkbox"/> Add/Delete Identity Recovery Coverage	<input type="checkbox"/> Add/Delete/Amend GreenPac Coverage
<input type="checkbox"/> Add/Delete/Amend Crisis Response	<input type="checkbox"/> Add/Delete/Amend Vehicle or Add'l Insured
<input type="checkbox"/> Add/Delete/Amend Loss Payee(Vehicle)	<input type="checkbox"/> Add 3rd Party Notice to Designated Person(s) or Organization(s)
<input type="checkbox"/> Other Changes	



# 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 Occurrence
Products Completed	\$3,000,000	Fire Damage
Personal/Advertising	\$1,000,000	Medical Expenses

☐ Liability Deductibles

☐ State Information

**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

Premium Basis \* 3,000

☐ Product Exclusion

☐ Apply Policy Level Deductible

Back Cancel Rate

**Locations**

[Expand All](#) | [Collapse All](#)

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

# 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**

Line of Business	Full Term	Non Qual Premium	Actual Premium	Coverage Extension	Market Size
Auto	\$4,099.00		no charge	Epac	
General Liab	\$3,108.00		no charge	Epac	
Inland Marine	\$103.00		no charge		
Property	\$2,121.00		no charge		
Totals	\$9,431.00		no charge		

Premium Total:  
**\$9,431.00**

**ACTION REQUIRED**  
Premium shown is an indication only. Select Next to determine your authority to process the endorsement.

**Tools & Resources**  
[Rating Worksheets](#)  
[Pricing](#)  
[Cover Letter](#)  
[Supplemental Applications](#)  
[Quote Proposal](#)  
[Modify Risk Grp/Add'l Exposures](#)  
[Facultative Reinsurance](#)  
[Global ITV Calculation](#)

**Next to Finalize Policy**

**Underwriting Review** Forms

**Underwriting Review Results**  
Underwriting Review Successful

**Next to Forms**

# Amend GL Premium Basis

- ❑ 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		
<b>Total</b>	<b>\$9,431.00</b>		no charge		

Premium Total:  
**\$9,431.00**

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Issue

# Technology Training

## Amend Contractor's Equipment Schedule



# Amend Contractor's Equipment Schedule

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

Latest Transactions									Get a Quote ▶	
Search		Name Insured								
Info	Account Name	Policy No.	Quote	Policy Type	Status	Effective	Expiration	Actions		
	AGT END 4-22 - ALL	S 8133429-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	<b>Endorse</b>   Renewal   View   More ▼		

Latest Transactions									Get a Quote ▶	
Search		Name Insured								
Info	Account Name	Policy No.	Quote	Policy Type	Status	Effective	Expiration	Actions		
	AGT END 4-22 - ALL	S 8133429-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	View   <b>More</b> ▼		
	AGT END 4-22 - GL	S 8133424-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	Endorse   Renewal (Quote)   Policy Notepad   Auto ID Cards   Create New Submission   Agency Download		
	AGT END 4-22 - GL	WC 2503964-00		WORK COMP	ISSUED	05/05/2014	05/05/2015	Renewal   Endorse   Policy Notepad   Auto ID Cards   Create New Submission   Agency Download		
	AGT END 4-22 - MULTI	S 8133428-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	Renewal   Endorse   Policy Notepad   Auto ID Cards   Create New Submission   Agency Download		
	AGT END FLOW - CPP	S 8132667-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	Endorse   Renewal (Quote)   Policy Notepad   Auto ID Cards   Create New Submission   Agency Download		

# 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:

- *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

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

Cancel

Next >

# Amend Contractor's Equipment Schedule

- ☐ Enter changes to the Contractor's Equipment.
  - ☐ Add *Loss Payee*, if needed
- ☐ Click **Rate** to proceed

The screenshot shows the 'Contractors Equipment' section of an insurance policy management system. At the top, there are tabs for 'Account Information', 'Policy Details', 'Locations', 'Lob Details', 'Premium Summary', and 'Finalize Policy'. Below these, a navigation bar includes 'General Liability', 'Property', 'Inland Marine', and 'Automobile'. A 'Rate' button is highlighted in the top right corner. A warning message states: 'Warning: If deleting any equipment with loss payees, please update the loss payee form CM 71 95 with your changes.' The main section is titled 'Contractors Equipment' and shows 'ClassCode 0205'. Under the 'Scheduled' tab, the 'Contractors Equipment - Schedule' checkbox is checked. A table lists scheduled items with columns for 'Item #', 'Description of Scheduled Property', 'Limit of Insurance', and 'Actions'. One item is listed: '00001' with description 'PROP DESC 1' and a limit of '\$4,000'. The 'Actions' column for this item has a 'Delete' link. A '+ Add Scheduled Item' button is located above the table. Below the table, there is a 'Loss Payee' checkbox, which is highlighted with a red box. At the bottom, there are 'Exit To Dashboard' and 'Rate' buttons, with the 'Rate' button highlighted. On the right side, there is a 'Your Quote Summary' section with details about the account and policy.

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

General Liability | Property | Inland Marine | Automobile

**Rate**

**Contractors Equipment**

**Warning:** If deleting any equipment with loss payees, please update the loss payee form CM 71 95 with your changes.

ClassCode 0205

**Scheduled**

☒ Contractors Equipment - Schedule

**Details**

**+ Add Scheduled Item**

Item #	Description of Scheduled Property	Limit of Insurance	Actions
00001	PROP DESC 1	\$4,000	Delete

Total : \$4,000

**Loss Payee** ☐

**Special Provisions**

**Exit To Dashboard** **Rate**

**Your Quote Summary**

ACCOUNT INFORMATION  
AGT END 4-22 - ALL  
(759) 627-7034  
CPP PACKAGE

POLICY DETAILS  
Selective Fire and Casualty In  
Lines of Business  
Automobile, General Liability, I  
Property  
SIC Code  
174102 | MASONRY - OTHER

LOCATIONS (2)  
001 - 40 WANTAGE AVE | 1 B  
002 - 41 WANTAGE AVE | 1 B

LOB DETAILS  
☐ Automobile  
☐ General Liability  
☐ Inland Marine  
☐ Property

# 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

The screenshot displays two sequential pages from the Selective Insurance system. The top page is the 'Premium Summary' page, which features a table of line items, a premium total of \$9,431.00, and a 'Next to Finalize Policy' button. The bottom page is the 'Underwriting Review' page, showing a successful review result and a 'Next to Forms' button. Red boxes highlight the 'Premium Summary' tab, the 'Next to Finalize Policy' button, the 'Underwriting Review' tab, and the 'Next to Forms' button.

Line of Business	Full Term	Non Qual Premium	Actual Premium	Coverage Extension	Market Size
Auto	\$4,099.00		no charge	Epac	
General Liab	\$3,108.00		no charge	Epac	
Inland Marine	\$103.00		no charge		
Property	\$2,121.00		no charge		
<b>Totals</b>	<b>\$9,431.00</b>		<b>no charge</b>		

**Premium Total:**  
**\$9,431.00**

**ACTION REQUIRED**  
Premium shown is an indication only. Select Next to determine your authority to process the endorsement.

**Tools & Resources**

- Rating Worksheets
- Pricing
- Cover Letter
- Supplemental Applications
- Quote Proposal
- Modify Risk Grp/Add'l Exposures
- Facultative Reinsurance
- Global ITV Calculation

**Your Quote Summary**

ACCOUNT INFORMATION  
AGT END 4-22 - ALL  
(759) 627-7034  
CPP PACKAGE

POLICY DETAILS  
Selective Fire and Casualty Ins Co  
Lines of Business  
Automobile, General Liability, Inland Marine, Property  
SIC Code  
174102 | MASONRY - OTHER THAN CHIM

LOCATIONS (2)  
001 - 40 WANTAGE AVE | 1 Buildings  
002 - 41 WANTAGE AVE | 1 Buildings

LOB DETAILS

- Automobile
- General Liability
- Inland Marine
- Property

**Underwriting Review Results**  
Underwriting Review Successful

Inland Marine Forms CM 71 95

01/09



[Complete Form](#)



CONTRACTOR'S EQUIP LOSS PAYEE SCHEDULE



# Amend Contractor's Equipment Schedule

- ❑ 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** 174102MASONRY - 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		
<b>Total</b>	<b>\$9,431.00</b>		no charge		

Premium Total:  
**\$9,431.00**

← Back

Issue

# Technology Training

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

# Add/Delete/Amend Mortgagee (Property)

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

Latest Transactions

Search

Get a Quote ▶

Info	Account Name	Policy No.	Quote	Policy Type	Status	Effective	Expiration	Actions
	AGT END 4-22 - ALL	S 8133429-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	<b>Endorse</b>   Renewal   View   More ▼

Latest Transactions

Search

Get a Quote ▶

Info	Account Name	Policy No.	Quote	Policy Type	Status	Effective	Expiration	Actions
	AGT END 4-22 - ALL	S 8133429-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	View   <b>More</b> ▼
	AGT END 4-22 - GL	S 8133424-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	Endorse   Renewal (Quote)   Policy Notepad   Auto ID Cards   Create New Submission   Agency Download
	AGT END 4-22 - GL	WC 2503964-00		WORK COMP	ISSUED	05/05/2014	05/05/2015	Renewal   Endorse   Policy Notepad   Auto ID Cards   Create New Submission   Agency Download
	AGT END 4-22 - MULTI	S 8133428-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	Renewal   Endorse   Policy Notepad   Auto ID Cards   Create New Submission   Agency Download
	AGT END FLOW - CPP	S 8132667-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	Endorse   Renewal (Quote)   Policy Notepad   Auto ID Cards   Create New Submission   Agency Download



# 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:

- *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	
<b>Effective Date of Change *</b>	<input type="text" value="__/__/__"/>
<b>Transaction Description *</b>	<input type="text"/>
<b>Endorsement Types</b>	
<input type="checkbox"/> Amend Mailing Address	<input type="checkbox"/> Amend Pay Plan
<input type="checkbox"/> Delete Terrorism Coverage	<input type="checkbox"/> Amend Premium Basis for GL
<input type="checkbox"/> Amend Contractor's Equipment Schedule	<input type="checkbox"/> Add/Delete/Amend Mortgagee(Property)
<input type="checkbox"/> Add/Delete/Amend Loss Payee (Property)	<input type="checkbox"/> Add/Delete/Amend Add'l Insured (Property)
<input type="checkbox"/> Add/Delete Identity Recovery Coverage	<input type="checkbox"/> Add/Delete/Amend GreenPac Coverage
<input type="checkbox"/> Add/Delete/Amend Crisis Response	<input type="checkbox"/> Add/Delete/Amend Vehicle or Add'l Insured
<input type="checkbox"/> Add/Delete/Amend Loss Payee(Vehicle)	<input type="checkbox"/> Add 3rd Party Notice to Designated Person(s) or Organization(s)
<input type="checkbox"/> Other Changes	



# 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

The screenshot displays the 'Forms' section of a software interface. At the top, there are tabs for 'Account Information', 'Policy Details', 'Locations', 'Lob Details', 'Premium Summary', and 'Finalize'. Below these, the 'Forms' section is divided into 'Incomplete Forms' and 'Attached Forms'. A table lists forms with columns: 'Line Of Business', 'Name', 'Edition Date', 'Fill-In Status', 'Actions', and 'Description'. The first row shows 'Property Forms', 'CP 76 23', '10/11', a warning icon, and a 'Complete Form' button highlighted with a red box. Below the table is a 'View Named Interests' button.

Below the table, the 'PROPERTY MORTGAGE HOLDERS SCHEDULE' form is shown. It includes fields for 'Form Number: CP 76 23 10/11', 'NAMES:', 'Address1:', 'Address2:', 'City:', 'State:', and 'Zip Code:'. A red box highlights the 'NAMES:' field and the 'Copy Names' button. At the bottom, there is an 'Add Name' button and a 'Return to Property Forms' button highlighted with a red box.

# Add/Delete/Amend Mortgagee (Property)

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

Account Information Policy Details Locations Lob Details Premium Summary Finalize Policy

Forms

Review / Issue

Status

✓ Forms

Incomplete Forms Attached Forms

+ Property Forms Add / Remove / View Property Forms

View Named Interests

Back Cancel Exit To Dashboard Next

# Add/Delete/Amend Mortgagee (Property)

- ❑ 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		
<b>Total</b>	<b>\$9,431.00</b>		<b>no charge</b>		

Premium Total:  
**\$9,431.00**

← Back

Issue

# Technology Training

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



# Add/Delete/Amend Loss Payee (Property)

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

Latest Transactions

Info	Account Name	Policy No.	Quote	Policy Type	Status	Effective	Expiration	Actions
	AGT END 4-22 - ALL	S 8133429-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	<a href="#" style="background-color: yellow; border: 2px solid red; padding: 2px;">Endorse</a> <a href="#">Renewal</a>   <a href="#">View</a>   <a href="#">More</a>

Latest Transactions

Info	Account Name	Policy No.	Quote	Policy Type	Status	Effective	Expiration	Actions
	AGT END 4-22 - ALL	S 8133429-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	<a href="#">View</a>   <a href="#">More</a>
	AGT END 4-22 - GL	S 8133424-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	<a href="#">Endorse</a>
	AGT END 4-22 - GL	WC 2503964-00		WORK COMP	ISSUED	05/05/2014	05/05/2015	<a href="#">Renewal</a>
	AGT END 4-22 - MULTI	S 8133428-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	<a href="#">Renewal</a>
	AGT END FLOW - CPP	S 8132667-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	<a href="#">Endorse</a>

More

Renewal (Quote)

Endorse

Policy Notepad

Auto ID Cards

Create New Submission

Agency Download

# 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:

- *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	
<b>Effective Date of Change *</b> _/_/____	<b>Transaction Description *</b> _____
<b>Endorsement Types</b>	
<input type="checkbox"/> Amend Mailing Address	<input type="checkbox"/> Amend Pay Plan
<input type="checkbox"/> Delete Terrorism Coverage	<input type="checkbox"/> Amend Premium Basis for GL
<input type="checkbox"/> Amend Contractor's Equipment Schedule	<input type="checkbox"/> Add/Delete/Amend Mortgagee(Property)
<input type="checkbox"/> Add/Delete/Amend Loss Payee (Property)	<input type="checkbox"/> Add/Delete/Amend Add'l Insured (Property)
<input type="checkbox"/> Add/Delete Identity Recovery Coverage	<input type="checkbox"/> Add/Delete/Amend GreenPac Coverage
<input type="checkbox"/> Add/Delete/Amend Crisis Response	<input type="checkbox"/> Add/Delete/Amend Vehicle or Add'l Insured
<input type="checkbox"/> Add/Delete/Amend Loss Payee(Vehicle)	<input type="checkbox"/> Add 3rd Party Notice to Designated Person(s) or Organization(s)
<input type="checkbox"/> Other Changes	

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

The screenshot displays the 'Forms' section of a software interface. At the top, there are tabs for 'Account Information', 'Policy Details', 'Locations', 'Lob Details', 'Premium Summary', and 'Finalize Policy'. Below these, the 'Forms' section is divided into 'Incomplete Forms' and 'Attached Forms'. A table lists forms with columns: 'Line Of Business', 'Name', 'Edition Date', 'Fill-In Status', 'Actions', and 'Description'. The first row shows 'Property Forms', 'CP 12 18', '06/07', a red status icon, and a 'Complete Form' button (highlighted in red). Below the table, there are buttons for 'View Named Interests', 'Back', and 'Cancel'. A modal window titled 'LOSS PAYABLE PROVISIONS' is open, showing 'Form Number: CP 12 18 06/07'. It contains fields for 'NAME:', 'Address1:', 'Address2:', 'City:', 'State:' (a dropdown menu), and 'Zip Code:'. Below these is a link 'ADD LOC/BLDG(S)'. The 'PROVISIONS APPLICABLE' section has checkboxes for 'LOSS PAYABLE', 'LENDER'S PAYABLE', 'CONTRACT OF SALE', and 'BUILDING OWNER LOSS PAYABLE', followed by a 'DESCRIPTION OF PROPERTY' field. A 'Copy Names' button is visible on the right. At the bottom of the modal, there is an 'Add Name' button and a 'Return to Property Forms' button (highlighted in red).

# Add/Delete/Amend Loss Payee (Property)

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

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

**Forms**

Incomplete Forms Attached Forms

+ Common Forms Add / Remove / View Common Forms

+ Automobile Forms Add / Remove / View Automobile Forms

+ General Liability Forms Add / Remove / View General Liability Forms

+ Property Forms Add / Remove / View Property Forms

View Named Interests

Review / Issue

Status

✓ Forms

◀ Back Cancel Exit To Dashboard Next ▶



# Add/Delete/Amend Loss Payee (Property)

- ❑ 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** 174102MASONRY - 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		
<b>Total</b>	<b>\$9,431.00</b>		<b>no charge</b>		

Premium Total:  
**\$9,431.00**

← Back

Issue

# Technology Training

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

# Add/Delete/Amend Additional Insured (Property)

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

Latest Transactions

Info	Account Name	Policy No.	Quote	Policy Type	Status	Effective	Expiration	Actions
	AGT END 4-22 - ALL	S 8133429-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	<span style="border: 2px solid red; padding: 2px;">Endorse</span> <a href="#">Renewal</a>   <a href="#">View</a>   <a href="#">More</a>

Latest Transactions

Info	Account Name	Policy No.	Quote	Policy Type	Status	Effective	Expiration	Actions
	AGT END 4-22 - ALL	S 8133429-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	<a href="#">View</a>   <a href="#">More</a>
	AGT END 4-22 - GL	S 8133424-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	<a href="#">Endorse</a>
	AGT END 4-22 - GL	WC 2503964-00		WORK COMP	ISSUED	05/05/2014	05/05/2015	<a href="#">Renewal</a>
	AGT END 4-22 - MULTI	S 8133428-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	<a href="#">Renewal</a>
	AGT END FLOW - CPP	S 8132667-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	<a href="#">Endorse</a>

More

Renewal (Quote)

Endorse

Policy Notepad

Auto ID Cards

Create New Submission

Agency Download



# 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:

- *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	
<div>Effective Date of Change *</div> <div>Endorsement Types</div>	<div>Transaction Description *</div> <div><input type="checkbox"/> Amend Mailing Address</div> <div><input type="checkbox"/> Amend Pay Plan</div> <div><input type="checkbox"/> Delete Terrorism Coverage</div> <div><input type="checkbox"/> Amend Premium Basis for GL</div> <div><input type="checkbox"/> Amend Contractor's Equipment Schedule</div> <div><input type="checkbox"/> Add/Delete/Amend Mortgagee(Property)</div> <div><input type="checkbox"/> Add/Delete/Amend Loss Payee (Property)</div> <div><input type="checkbox"/> Add/Delete/Amend Add'l Insured (Property)</div> <div><input type="checkbox"/> Add/Delete Identity Recovery Coverage</div> <div><input type="checkbox"/> Add/Delete/Amend GreenPac Coverage</div> <div><input type="checkbox"/> Add/Delete/Amend Crisis Response</div> <div><input type="checkbox"/> Add/Delete/Amend Vehicle or Add'l Insured</div> <div><input type="checkbox"/> Add/Delete/Amend Loss Payee(Vehicle)</div> <div><input type="checkbox"/> Add 3rd Party Notice to Designated Person(s) or Organization(s)</div> <div><input type="checkbox"/> Other Changes</div>

Cancel

Next ▶



# Add/Delete/Amend Additional Insured (Property)

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

The screenshot shows a software interface for managing forms. At the top, there are tabs: Account Information, Policy Details, Locations, Lob Details, Premium Summary, and Finalize Policy. Below these is a 'Forms' section with two sub-tabs: Incomplete Forms and Attached Forms. A table lists forms with columns: Line Of Business, Name, Edition Date, Fill-In Status, Actions, and Description. One form is listed: Property Forms, CP 12 19, 06/07, with a red status icon and a 'Complete Form' button highlighted in red. Below the table is a 'View Named Interests' button. To the right, a 'Status' box shows a warning icon and the word 'Forms'. Below the 'View Named Interests' button are 'Back' and 'Cancel' buttons. The main form area displays 'Form Number: CP 12 19 | 06/07' and 'Premises No. Building No.'. Below this is a 'LOCATION SCHEDULE' table with columns: LOC, BLDG, CITY, and ST. It contains two rows of data. Below the location schedule is a 'SCHEDULE FIELD(S)' section with input fields for Building Description, Building Owner Name, and three Building Owner Address fields. At the bottom, there are 'Prev', 'Next', 'New', and 'Delete' buttons, and a 'Return to Forms List' button highlighted in red.

Line Of Business	Name	Edition Date	Fill-In Status	Actions	Description
Property Forms	CP 12 19	06/07		<a href="#">Complete Form</a>	ADDITIONAL INSURED-BUILDING OWNER

LOC	BLDG	CITY	ST
001	001	BRANCHVILLE	NJ
002	001	BRANCHVILLE	NJ

SCHEDULE FIELD(S)	
BUILDING DESCRIPTION	<input type="text"/>
BUILDING OWNER NAME	<input type="text"/>
BUILDING OWNER ADDRESS 1	<input type="text"/>
BUILDING OWNER ADDRESS 2	<input type="text"/>
BUILDING OWNER ADDRESS 3	<input type="text"/>

- ❑ Enter changes to the Additional Insured(s)
- ❑ Click **Return to Forms List**, when complete

# Add/Delete/Amend Additional Insured (Property)

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

Account Information Policy Details Locations Lob Details Premium Summary Finalize Policy

Forms

Incomplete Forms Attached Forms

+ Property Forms Add / Remove / View Property Forms

View Named Interests

Review / Issue

Status

✓ Forms

Back Cancel Exit To Dashboard Next

# Add/Delete/Amend Additional Insured (Property)

- ❑ 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		
<b>Total</b>	<b>\$9,431.00</b>		no charge		

Premium Total:  
**\$9,431.00**

← Back

Issue

# 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.

<div> <div>Latest Transactions</div> <div>                     Search                     Name Insured                     <input type="text"/> <input type="button" value="Q"/> </div> <div>Get a Quote ▶</div> </div>								
Info	Account Name	Policy No.	Quote	Policy Type	Status	Effective	Expiration	Actions
	AGT END 4-22 - ALL	S 8133429-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	<a href="#">Endorse</a> <a href="#">Renewal</a>   <a href="#">View</a>   <a href="#">More ▼</a>

<div> <div>Latest Transactions</div> <div>                     Search                     Name Insured                     <input type="text"/> <input type="button" value="Q"/> </div> <div>Get a Quote ▶</div> </div>								
Info	Account Name	Policy No.	Quote	Policy Type	Status	Effective	Expiration	Actions
	AGT END 4-22 - ALL	S 8133429-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	<a href="#">View</a>   <a href="#">More ▼</a>
	AGT END 4-22 - GL	S 8133424-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	<a href="#">Endorse</a>
	AGT END 4-22 - GL	WC 2503964-00		WORK COMP	ISSUED	05/05/2014	05/05/2015	<a href="#">Renew</a>
	AGT END 4-22 - MULTI	S 8133428-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	<a href="#">Renew</a>
	AGT END FLOW - CPP	S 8132667-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	<a href="#">Endorse</a>

# 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:

- *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	
<b>Effective Date of Change *</b>	<input type="text" value="___/___/___"/>
<b>Transaction Description *</b>	<input type="text"/>
<b>Endorsement Types</b>	
<input type="checkbox"/> Amend Mailing Address	<input type="checkbox"/> Amend Pay Plan
<input type="checkbox"/> Delete Terrorism Coverage	<input type="checkbox"/> Amend Premium Basis for GL
<input type="checkbox"/> Amend Contractor's Equipment Schedule	<input type="checkbox"/> Add/Delete/Amend Mortgagee(Property)
<input type="checkbox"/> Add/Delete/Amend Loss Payee (Property)	<input type="checkbox"/> Add/Delete/Amend Add'l Insured (Property)
<input type="checkbox"/> Add/Delete Identity Recovery Coverage	<input type="checkbox"/> Add/Delete/Amend GreenPac Coverage
<input type="checkbox"/> Add/Delete/Amend Crisis Response	<input type="checkbox"/> Add/Delete/Amend Vehicle or Add'l Insured
<input type="checkbox"/> Add/Delete/Amend Loss Payee(Vehicle)	<input type="checkbox"/> Add 3rd Party Notice to Designated Person(s) or Organization(s)
<input type="checkbox"/> Other Changes	

# Add/Delete Identity Recovery Coverage

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

- ❑ Click **Next**

Identity Recovery Coverage (IDR) Changes

Change Description \* Delete Identity Recovery Coverage

Identity Recovery Coverage ☐

Cancel Next

# Add/Delete Identity Recovery Coverage

- ❑ When rating is complete, Premium Summary page will display.
- ❑ Review and click **Next to Finalize Policy**

Line of Business	Full Term	Non Qual Premium	Actual Premium	Coverage Extension	Market Size
Auto	\$4,099.00		no charge	Epac	
General Liab	\$3,108.00		no charge	Epac	
Inland Marine	\$103.00		no charge		
Property	\$2,105.00		(\$16.00)		
<b>Totals</b>	<b>\$9,415.00</b>		<b>(\$16.00)</b>		

Premium Total:  
**(\$16.00)**

**ACTION REQUIRED**  
Premium shown is an indication only. Select Next to determine your authority to process the endorsement.

**Tools & Resources**

- Rating Worksheets
- Pricing
- Cover Letter
- Supplemental Applications
- Quote Proposal
- Modify Risk Grp/Add'l Exposures
- Facultative Reinsurance
- Global ITV Calculation

**Next to Finalize Policy**

**Underwriting Review** Forms

**Underwriting Review Results**

Underwriting Review Successful

**Next to Forms**

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



# Add/Delete Identity Recovery Coverage

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

**REVIEW & ISSUE**

<b>Account Name &amp; Address</b> AGT END 4-22 - ALL 41 WANTAGE AVE BRANCHVILLE, NJ 078265840 759.627.7034	<b>Policy Type</b> CPP PACKAGE <b>Effective Date</b> 05/05/14 <b>Expiration Date</b> 05/05/15 <b>Business Type</b> CONTRACTORS <b>Nature of Business</b> BESTINCLASINPUT	<b>Year Bus Began</b> 2009 <b>Ownership</b> INDIVIDUAL <b>Program Code</b> Special Contractors <b>SIC Code</b> 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	\$2,105.00		(\$16.00)		
<b>Total</b>	<b>\$9,415.00</b>		<b>(\$16.00)</b>		

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.

Latest Transactions									Get a Quote ▶	
Search		Name Insured								
Info	Account Name	Policy No.	Quote	Policy Type	Status	Effective	Expiration	Actions		
ⓘ	AGT END 4-22 - ALL	S 8133429-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	<b>Endorse</b>   Renewal   View   More ▼		

Latest Transactions									Get a Quote ▶	
Search		Name Insured								
Info	Account Name	Policy No.	Quote	Policy Type	Status	Effective	Expiration	Actions		
ⓘ	AGT END 4-22 - ALL	S 8133429-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	View   <b>More</b> ▼		
ⓘ	AGT END 4-22 - GL	S 8133424-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	Endorse   Renewal (Quote)   Policy Notepad   Auto ID Cards   Create New Submission   Agency Download		
ⓘ	AGT END 4-22 - GL	WC 2503964-00		WORK COMP	ISSUED	05/05/2014	05/05/2015	Renewal   Endorse   Policy Notepad   Auto ID Cards   Create New Submission   Agency Download		
ⓘ	AGT END 4-22 - MULTI	S 8133428-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	Renewal   Endorse   Policy Notepad   Auto ID Cards   Create New Submission   Agency Download		
ⓘ	AGT END FLOW - CPP	S 8132667-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	Endorse   Renewal (Quote)   Policy Notepad   Auto ID Cards   Create New Submission   Agency Download		



# 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:

- *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	
<b>Effective Date of Change *</b>	<input type="text" value="__/__/__"/> <input type="checkbox"/>
<b>Transaction Description *</b>	<input type="text"/>
<b>Endorsement Types</b>	
<input type="checkbox"/> Amend Mailing Address	<input type="checkbox"/> Amend Pay Plan
<input type="checkbox"/> Delete Terrorism Coverage	<input type="checkbox"/> Amend Premium Basis for GL
<input type="checkbox"/> Amend Contractor's Equipment Schedule	<input type="checkbox"/> Add/Delete/Amend Mortgagee(Property)
<input type="checkbox"/> Add/Delete/Amend Loss Payee (Property)	<input type="checkbox"/> Add/Delete/Amend Add'l Insured (Property)
<input type="checkbox"/> Add/Delete Identity Recovery Coverage	<input type="checkbox"/> Add/Delete/Amend GreenPac Coverage
<input type="checkbox"/> Add/Delete/Amend Crisis Response	<input type="checkbox"/> Add/Delete/Amend Vehicle or Add'l Insured
<input type="checkbox"/> Add/Delete/Amend Loss Payee(Vehicle)	<input type="checkbox"/> Add 3rd Party Notice to Designated Person(s) or Organization(s)
<input type="checkbox"/> Other Changes	



# Add/Delete/Amend GreenPac Coverage

- ❑ Complete changes to GreenPac coverage
- ❑ Click **Next**

☐ GreenPac Changes

Change Description:

☒ Property GreenPac

☐ Details

GreenPac Property Increased Cost (Occurrence/Aggregate) \*

GreenPac Soft Cost (Occurrence/Aggregate)

# Add/Delete/Amend GreenPac Coverage

- ❑ When rating is complete, Premium Summary screen will display.
- ❑ Review and click **Next to Finalize Policy**

Line of Business	Full Term	Non Qual Premium	Actual Premium	Coverage Extension	Market Size
Auto	\$4,099.00		no charge	Epac	
General Liab	\$3,108.00		no charge	Epac	
Inland Marine	\$103.00		no charge		
Property	\$2,146.00		\$25.00		
<b>Totals</b>	<b>\$9,456.00</b>		<b>\$25.00</b>		

Premium Total:  
**\$25.00**

**ACTION REQUIRED**  
Premium shown is an indication only. Select Next to determine your authority to process the endorsement.

**Tools & Resources**

- Rating Worksheets
- Pricing
- Cover Letter
- Supplemental Applications
- Quote Proposal
- Modify Risk Grp/Add'l Exposures
- Facultative Reinsurance
- Global ITV Calculation

**Submit For Review**

**Your Quote Summary**

ACCOUNT INFORMATION  
AGT END 4-22 - ALL  
(759) 627-7034  
CFP PACKAGE

POLICY DETAILS  
Selective Fire and Casualty Ins Co  
Lines of Business  
Automobile, General Liability, Inland Marine, Property  
SIC Code  
174102 | MASONRY - OTHER THAN CHIM

LOCATIONS (2)  
001 - 40 WANTAGE AVE | 1 Buildings  
002 - 41 WANTAGE AVE | 1 Buildings

LOB DETAILS

- Automobile
- General Liability
- Inland Marine

**Next to Finalize Policy**

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

**Underwriting Review**

Forms

**Underwriting Review Results**

Underwriting Review Successful

**Next to Forms**

**Status**

- Underwriting Review
- Forms

# Add/Delete/Amend GreenPac Coverage

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

**REVIEW & ISSUE**

**Account Name & Address**  
AGT END 4-22 - ALL  
41 WANTAGE AVE  
BRANCHVILLE, NJ 078285640  
759.827.7034

**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** 174102IMASONRY - 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	\$2,146.00		\$25.00		
<b>Total</b>	<b>\$9,456.00</b>		<b>\$25.00</b>		

Premium Total:  
**\$9,456.00**

← Back

Issue

# Technology Training

## Add/Delete/Amend Crisis Response



# Add/Delete/Amend Crisis Response

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

<div> <div>Latest Transactions</div> <div> <div>Search</div> <div>Name Insured</div> <div></div> <div>Q</div> </div> <div>Get a Quote ▶</div> </div>								
Info	Account Name	Policy No.	Quote	Policy Type	Status	Effective	Expiration	Actions
	AGT END 4-22 - ALL	S 8133429-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	<div>Endorse</div> <div>Renewal   View   More ▼</div>

<div> <div>Latest Transactions</div> <div> <div>Search</div> <div>Name Insured</div> <div></div> <div>Q</div> </div> <div>Get a Quote ▶</div> </div>								
Info	Account Name	Policy No.	Quote	Policy Type	Status	Effective	Expiration	Actions
	AGT END 4-22 - ALL	S 8133429-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	<div>View</div> <div>More ▼</div>
	AGT END 4-22 - GL	S 8133424-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	<div>Endorse</div> <div>Renewal (Quote)</div> <div>Policy Notepad</div> <div>Auto ID Cards</div> <div>Create New Submission</div> <div>Agency Download</div>
	AGT END 4-22 - GL	WC 2503964-00		WORK COMP	ISSUED	05/05/2014	05/05/2015	<div>Renewal</div>
	AGT END 4-22 - MULTI	S 8133428-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	<div>Renewal</div>
	AGT END FLOW - CPP	S 8132667-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	<div>Endorse</div>

# 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:

- *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	
<b>Effective Date of Change *</b>	<input type="text" value="__/__/__"/> <input type="button" value="Calendar"/>
<b>Transaction Description *</b>	<input type="text"/>
<b>Endorsement Types</b>	
<input type="checkbox"/> Amend Mailing Address	<input type="checkbox"/> Amend Pay Plan
<input type="checkbox"/> Delete Terrorism Coverage	<input type="checkbox"/> Amend Premium Basis for GL
<input type="checkbox"/> Amend Contractor's Equipment Schedule	<input type="checkbox"/> Add/Delete/Amend Mortgagee(Property)
<input type="checkbox"/> Add/Delete/Amend Loss Payee (Property)	<input type="checkbox"/> Add/Delete/Amend Add'l Insured (Property)
<input type="checkbox"/> Add/Delete Identity Recovery Coverage	<input type="checkbox"/> Add/Delete/Amend GreenPac Coverage
<input type="checkbox"/> Add/Delete/Amend Crisis Response	<input type="checkbox"/> Add/Delete/Amend Vehicle or Add'l Insured
<input type="checkbox"/> Add/Delete/Amend Loss Payee(Vehicle)	<input type="checkbox"/> Add 3rd Party Notice to Designated Person(s) or Organization(s)
<input type="checkbox"/> Other Changes	

# Add/Delete/Amend Crisis Response

- ❑ Complete changes to Crisis Response coverage
- ❑ Click **Next**

**Crisis Response Changes**

Change Description \*

**Property Crisis Response**

**Details**

Business Income and Extra Expense (occur/aqq) \*

Counseling Expense (occur/agg)

# Add/Delete/Amend Crisis Response

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

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

Line of Business	Full Term	Non Qual Premium	Actual Premium	Coverage Extension	Market Size
Auto	\$4,099.00		no charge	Epac	
General Liab	\$3,108.00		no charge	Epac	
Inland Marine	\$103.00		no charge		
Property	\$2,149.00		\$28.00		
<b>Totals</b>	<b>\$9,459.00</b>		<b>\$28.00</b>		

Premium Total:  
**\$28.00**

**ACTION REQUIRED**  
Premium shown is an indication only. Select Next to determine your authority to process the endorsement.

**Tools & Resources**  
Rating Worksheets  
Pricing  
Cover Letter  
Supplemental Applications  
Quote Proposal  
Modify Risk Grp/Add'l Exposures  
Facultative Reinsurance  
Global ITV Calculation

**Next to Finalize Policy**

- ❑ Underwriting Review will display

- ❑ Click **Next to Forms**

**Underwriting Review**

Underwriting Review Results  
Underwriting Review Successful

**Status**  
Underwriting Review  
Forms

**Next to Forms**



# Add/Delete/Amend Crisis Response

- ❑ 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	\$2,149.00		\$28.00		
<b>Total</b>	<b>\$9,459.00</b>		<b>\$28.00</b>		

**Premium Total:**  
**\$9,459.00**

← Back

Issue

# Technology Training

Add/Delete/Amend Vehicle or  
Additional Insured

# Add/Delete/Amend Vehicle or Additional Insured

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

Latest Transactions									Get a Quote ▶	
Search		Name Insured								
Info	Account Name	Policy No.	Quote	Policy Type	Status	Effective	Expiration	Actions		
ⓘ	AGT END 4-22 - ALL	S 8133429-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	<b>Endorse</b>   Renewal   View   More ▼		

Latest Transactions									Get a Quote ▶	
Search		Name Insured								
Info	Account Name	Policy No.	Quote	Policy Type	Status	Effective	Expiration	Actions		
ⓘ	AGT END 4-22 - ALL	S 8133429-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	View   <b>More</b> ▼		
ⓘ	AGT END 4-22 - GL	S 8133424-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	Endorse   Renewal (Quote)   Policy Notepad   Auto ID Cards   Create New Submission   Agency Download		
ⓘ	AGT END 4-22 - GL	WC 2503964-00		WORK COMP	ISSUED	05/05/2014	05/05/2015	Renewal   Endorse   Policy Notepad   Auto ID Cards   Create New Submission   Agency Download		
ⓘ	AGT END 4-22 - MULTI	S 8133428-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	Renewal   Endorse   Policy Notepad   Auto ID Cards   Create New Submission   Agency Download		
ⓘ	AGT END FLOW - CPP	S 8132667-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	Endorse   Renewal (Quote)   Policy Notepad   Auto ID Cards   Create New Submission   Agency Download		



# 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:

- *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	
<b>Effective Date of Change *</b>	<input type="text" value="__/__/"/>
<b>Transaction Description *</b>	<input type="text" value=""/>
<b>Endorsement Types</b>	<div><div><input type="checkbox"/> Amend Mailing Address</div><div><input type="checkbox"/> Delete Terrorism Coverage</div><div><input type="checkbox"/> Amend Contractor's Equipment Schedule</div><div><input type="checkbox"/> Add/Delete/Amend Loss Payee (Property)</div><div><input type="checkbox"/> Add/Delete Identity Recovery Coverage</div><div><input type="checkbox"/> Add/Delete/Amend Crisis Response</div><div><input type="checkbox"/> Add/Delete/Amend Loss Payee(Vehicle)</div><div><input type="checkbox"/> Other Changes</div></div> <div><div><input type="checkbox"/> Amend Pay Plan</div><div><input type="checkbox"/> Amend Premium Basis for GL</div><div><input type="checkbox"/> Add/Delete/Amend Mortgagee(Property)</div><div><input type="checkbox"/> Add/Delete/Amend Add'l Insured (Property)</div><div><input type="checkbox"/> Add/Delete/Amend GreenPac Coverage</div><div><input type="checkbox"/> Add/Delete/Amend Vehicle or Add'l Insured</div><div><input type="checkbox"/> Add 3rd Party Notice to Designated Person(s) or Organization(s)</div></div>



# 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

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

General Liability | Property | Inland Marine | **Automobile**

Vehicle Summary (3)

Update Deductible on selected

Select All		Deselect All									Actions	
No	St	Yr	Make/Model	Class Code	Type	VIN	New \$	OTC Ded	Coll			
<input type="checkbox"/>	001	NJ	13	CHEV / TRUCK	011790	03	GH56Y356WH34H423H	\$25,000	\$250	\$500	Edit	Delete
<input type="checkbox"/>	002	NJ	14	DODGE / TRUCK	011790	03	D43UHT893HGH1544G	\$30,000	\$250	\$500	Edit	Delete
<input type="checkbox"/>	003	NJ	14	FORD / TRUCK	011790	03	F34F4QG5G45GGRR5F				Edit	Delete

Select All | Deselect All

Update Deductible on selected

# 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

## Copy Vehicle Information

No	State	Year	Make/Model	Class Code	Type	VIN	New \$	OTC Ded	Collision Ded	Actions - Copy Options
001	NJ	13	CHEV/TRUCK 1	011790	03	V42G425H24G54GG53		250	500	<a href="#">All Info</a>   <a href="#">Vehicle &amp; Cov</a>   <a href="#">City Only</a>   <a href="#">City &amp; Cov</a>
002	NJ	14	DODGE/TRUCK	011790	03	C54GY2HV24395GH93		250	500	<a href="#">All Info</a>   <a href="#">Vehicle &amp; Cov</a>   <a href="#">City Only</a>   <a href="#">City &amp; Cov</a>
003	NJ	14	CHEV/TRUCK 3	011030	03	45YTQW4TTQ434E4DE				<a href="#">All Info</a>   <a href="#">Vehicle &amp; Cov</a>   <a href="#">City Only</a>   <a href="#">City &amp; Cov</a>

Cancel

Vehicle Information: Vehicle 004 | NJ

[Copy Vehicle Information](#)

## Garaging Information

State \* NEW JERSEY

Vehicle # 004

Copy Options

Select...

## City/County Information

## Vehicle Information

2014

CHEV

TRUCK 4

N348HF8C3VC3C344H

[Validate VIN](#)

☐ Override

03



TRUCKS INCL P/U + PANELS

No



Composite Rate

Back

Cancel

Exit To Dashboard

Next

# 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

The screenshot displays the 'Class Code' selection interface. The top section, titled 'Class Code', contains two radio buttons: 'Enter and Validate Class Code' (selected) and 'Generate Class Code'. Below the 'Enter and Validate Class Code' option is a text input field containing '011020' and a 'Validate Class Code' button. Below the 'Generate Class Code' option is a 'Generate Class Code' button. The bottom section, titled 'Class Code Information', contains a 'Primary Class Code Information Section' with three dropdown menus: 'Vehicle Weight' (set to 'LIGHT TRUCKS'), 'Vehicle Use' (set to 'SERVICE USE'), and 'Radius of Use' (set to 'LOCAL (<= 50 MI)'). Below this is a 'Secondary Class Code Information Section' with a 'Secondary Class Code' dropdown menu (set to '02') and a 'Dumping Operation' checkbox. At the bottom of the 'Class Code Information' section is a 'Generate Class Code' button. The bottom of the interface features a navigation bar with 'Back', 'Cancel', 'Exit To Dashboard', and 'Next' buttons.

# Add/Delete/Amend Vehicle or Additional Insured

- ☐ Select *Vehicle Coverages* for the newly added vehicle(s).
- ☐ Click **Rate** to proceed.

☐ Vehicle Coverages ?

☒ Liability

☐ Med Pay

☒ Uninsured Motorist

☐ Comprehensive

☐ Spec Perils

☐ Collision

☐ Loss Payee

☐ Vehicle Overrides ✓

[+ Add Another Vehicle](#)

[← Back](#) [Cancel](#) [Exit To Dashboard](#) [Rate](#) [Next →](#)



# Add/Delete/Amend Vehicle or Additional Insured

- ❑ When rating is complete, Premium Summary screen will display.
- ❑ Review and click **Next to Finalize Policy**

The Premium Summary screen displays the following information:

Line of Business	Full Term	Non Qual Premium	Actual Premium	Coverage Extension	Market Size
Auto	\$6,004.00		\$1,905.00	Epao	
General Liab	\$3,108.00		no charge	Epao	
Inland Marine	\$103.00		no charge		
Property	\$2,121.00		no charge		
<b>Totals</b>	<b>\$11,336.00</b>		<b>\$1,905.00</b>		

Premium Total: **\$1,905.00**

**ACTION REQUIRED**  
Premium shown is an indication only. Select Next to determine your authority to process the endorsement.

**Tools & Resources**

- Rating Worksheets
- Pricing
- Cover Letter
- Supplemental Applications
- Quote Proposal
- Modify Risk Grp/Add'l Exposures
- Facultative Reinsurance
- Global ITV Calculation

**Next to Finalize Policy**

- ❑ Underwriting Review will display
- ❑ Click **Print Auto ID Cards**

The Underwriting Review screen displays the following information:

**Underwriting Review Results**

Underwriting Review Successful

**Print Auto ID Cards**

# 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**.

States and Vehicles | Insured Overrides | Additional Insured Lessors | Vehicle Overrides | Field Office Overrides

☐ Other Than Annually Billed

☐ Predominant Insured Information

Insured Name 1

Insured Address 1

Insured City

KRISTY AUTO POLICY

40 WANTAGE AVE

BRANCHVILLE, NJ 078265640

☐ States

Selected	State	# of Copies
<input checked="" type="checkbox"/>	NJ	1 ▾

☐ Vehicles

Print Type \*

All Vehicles  
Selected Vehicles

☐ Excluded Drivers/Vehicles

☐ Exclude Drivers and/or Vehicles?

◀ Back

Cancel

Exit To Dashboard

Print/Return to Finalize

Next ▶

# 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

The screenshot displays the 'Underwriting Review' section with a 'Forms' tab. A table lists 'Automobile Forms' with a 'Complete Form' button highlighted. Below the table is a 'View Named Interests' button. A modal window titled 'COMMERCIAL AUTO DECLARATION PAGE 1' is open, showing a form with fields for 'Form Number', 'NAMES', 'Address1', 'Address2', 'City', 'State', and 'Zip Code'. A red box highlights the 'ADD VEHICLE(S)' button at the bottom of the form. Other buttons like 'Copy Names', 'Add Name', and 'Return to Auto Forms' are also visible.

Line Of Business	Name	Edition	Fill-In Date	Status	Actions	Description
Automobile Forms	CA 70 57	02/92			<a href="#">Complete Form</a>	AUTO DEC-LOSS PAYEE

[View Named Interests](#)

COMMERCIAL AUTO DECLARATION PAGE 1

Form Number: CA 70 57 02/92

NAMES:

Address1:

Address2:

City:

State:

Zip Code:

[ADD VEHICLE\(S\)](#)

[Add Name](#)

[Return to Auto Forms](#) [Cancel](#)

[Copy Names](#)

# Add/Delete/Amend Vehicle or Additional Insured

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

The screenshot displays the 'Finalize Policy' step in an insurance policy management system. At the top, a navigation bar includes tabs for 'Account Information', 'Policy Details', 'Locations', 'Lob Details', 'Premium Summary', and 'Finalize Policy' (which is highlighted with a red box). Below this, the 'Underwriting Review' section is active, with a 'Forms' tab selected. The main content area shows 'Incomplete Forms' and 'Attached Forms' tabs. Under 'Attached Forms', there is a section for 'Automobile Forms' with a link to 'Add / Remove / View Automobile Forms' and a 'View Named Interests' button. On the right side, a 'Status' panel shows 'Underwriting Review' and 'Forms' both with green checkmarks. At the bottom, a dark blue bar contains buttons for 'Back', 'Cancel', 'Exit To Dashboard', and 'Next' (which is highlighted with a red box). A 'Review / Issue' button is also visible on the right side of the interface.



# Add/Delete/Amend Vehicle or Additional Insured

- ❑ 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

## Add/Delete/Amend Loss Payee (Vehicle)

# Add/Delete/Amend Loss Payee (Vehicle)

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

Latest Transactions									Get a Quote ▶	
Search		Name Insured								
Info	Account Name	Policy No.	Quote	Policy Type	Status	Effective	Expiration	Actions		
	AGT END 4-22 - ALL	S 8133429-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	<b>Endorse</b>   Renewal   View   More ▼		

Latest Transactions									Get a Quote ▶	
Search		Name Insured								
Info	Account Name	Policy No.	Quote	Policy Type	Status	Effective	Expiration	Actions		
	AGT END 4-22 - ALL	S 8133429-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	View   <b>More</b> ▼		
	AGT END 4-22 - GL	S 8133424-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	Endorse   Renewal (Quote)   Policy Notepad   Auto ID Cards   Create New Submission   Agency Download		
	AGT END 4-22 - GL	WC 2503964-00		WORK COMP	ISSUED	05/05/2014	05/05/2015	Renewal   Endorse   Policy Notepad   Auto ID Cards   Create New Submission   Agency Download		
	AGT END 4-22 - MULTI	S 8133428-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	Renewal   Endorse   Policy Notepad   Auto ID Cards   Create New Submission   Agency Download		
	AGT END FLOW - CPP	S 8132667-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	Endorse   Renewal (Quote)   Policy Notepad   Auto ID Cards   Create New Submission   Agency Download		



# 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:

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

Cancel



# 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

Line Of Business	Name	Edition Date	Fill-In Status	Actions	Description
Automobile Forms	CA 70 57	02/92	⚠	<a href="#">Complete Form</a>	COMMERCIAL AUTO DECLARATION PAGE 1

[View Named Interests](#)

- ❑ 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.

Form Number: CA 70 57 02/92

NAMES:

Address1:

Address2:

City:

State:

Zip Code:

[ADD VEHICLE\(S\)](#)

[Add Name](#)

[Copy Names](#)

[Return to Auto Forms](#) [Cancel](#)

# Add/Delete/Amend Loss Payee (Vehicle)

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

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

**Forms**

Incomplete Forms Attached Forms

+ Common Forms Add / Remove / View Common Forms

+ Automobile Forms Add / Remove / View Automobile Forms

+ General Liability Forms Add / Remove / View General Liability Forms

+ Property Forms Add / Remove / View Property Forms

View Named Interests

Review / Issue

Status

✓ Forms

◀ Back Cancel Exit To Dashboard **Next ▶**

# Add/Delete/Amend Loss Payee (Vehicle)

- ❑ 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** 174102MASONRY - OTH

Line of Business	Full Term	Non-Qual Premium	Actual Premium	Coverage Extensions	Mid 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		
<b>Total</b>	<b>\$9,431.00</b>		<b>no charge</b>		

Premium Total:  
**\$9,431.00**

← Back

Issue

# Technology Training

Add 3<sup>rd</sup> Party Notice to Designated  
Persons or Organizations



# Add 3<sup>rd</sup> Party Notice to Designated Persons or Organizations

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

Latest Transactions									Get a Quote ▶	
Search		Name Insured								
Info	Account Name	Policy No.	Quote	Policy Type	Status	Effective	Expiration	Actions		
	AGT END 4-22 - ALL	S 8133429-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	<b>Endorse</b>   Renewal   View   More ▼		

Latest Transactions									Get a Quote ▶	
Search		Name Insured								
Info	Account Name	Policy No.	Quote	Policy Type	Status	Effective	Expiration	Actions		
	AGT END 4-22 - ALL	S 8133429-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	View   <b>More</b> ▼		
	AGT END 4-22 - GL	S 8133424-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	Endorse   Renewal (Quote)   Policy Notepad   Auto ID Cards   Create New Submission   Agency Download		
	AGT END 4-22 - GL	WC 2503964-00		WORK COMP	ISSUED	05/05/2014	05/05/2015	Renewal   Endorse   Policy Notepad   Auto ID Cards   Create New Submission   Agency Download		
	AGT END 4-22 - MULTI	S 8133428-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	Renewal   Endorse   Policy Notepad   Auto ID Cards   Create New Submission   Agency Download		
	AGT END FLOW - CPP	S 8132667-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	Endorse   Renewal (Quote)   Policy Notepad   Auto ID Cards   Create New Submission   Agency Download		

# Add 3<sup>rd</sup> Party Notice to Designated Persons or Organizations

- ☐ Enter *Effective Date of Change*
- ☐ Select **Add 3<sup>rd</sup> Party Notice to Designated Persons or Organizations**
  - ☐ *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	
<b>Effective Date of Change *</b>	<input type="text" value="___/___/___"/>
<b>Transaction Description *</b>	<input type="text" value=""/>
<b>Endorsement Types</b>	
<input type="checkbox"/> Amend Mailing Address	<input type="checkbox"/> Amend Pay Plan
<input type="checkbox"/> Delete Terrorism Coverage	<input type="checkbox"/> Amend Premium Basis for GL
<input type="checkbox"/> Amend Contractor's Equipment Schedule	<input type="checkbox"/> Add/Delete/Amend Mortgagee(Property)
<input type="checkbox"/> Add/Delete/Amend Loss Payee (Property)	<input type="checkbox"/> Add/Delete/Amend Add'l Insured (Property)
<input type="checkbox"/> Add/Delete Identity Recovery Coverage	<input type="checkbox"/> Add/Delete/Amend GreenPac Coverage
<input type="checkbox"/> Add/Delete/Amend Crisis Response	<input type="checkbox"/> Add/Delete/Amend Vehicle or Add'l Insured
<input type="checkbox"/> Add/Delete/Amend Loss Payee(Vehicle)	<input type="checkbox"/> Add 3rd Party Notice to Designated Person(s) or Organization(s)
<input type="checkbox"/> Other Changes	

# Add 3<sup>rd</sup> Party Notice to Designated Persons or Organizations

- ❑ Click *Complete Form* to access the form.

Account Information Policy Details Locations Lob Details Premium Summary Finalize Policy

Forms

Incomplete Forms Attached Forms

Line Of Business	Name	Edition	Fill-In Date	Status	Actions	Description
Common Forms	IL 79 90	10/10			Complete Form	THIRD PARTY NOTICE

View Named Interests

Back Cancel Exit To Dashboard

- ❑ 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.

THIRD PARTY NOTICE

Form Number: IL 79 90 10/10

NAMES: [Text Field]

Address1: [Text Field]

Address2: [Text Field]

City: [Text Field]

State: Select...

Zip Code: [Text Field]

Copy Names

NUMBER OF DAYS NOTICE REQUIRED IN THE CONTRACT [Text Field]

Add Name

Return to Named Interest Forms Cancel

# Add 3<sup>rd</sup> Party Notice to Designated Persons or Organizations

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

Account Information Policy Details Locations Lob Details Premium Summary Finalize Policy

Forms

Review / Issue

Incomplete Forms Attached Forms

+ Common Forms Add / Remove / View Common Forms

View Named Interests

Back Cancel Exit To Dashboard Next

Status

✓ Forms



# Add 3<sup>rd</sup> Party Notice to Designated Persons or Organizations

- ❑ 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** 174102MASONRY - 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		
<b>Total</b>	<b>\$9,431.00</b>		<b>no charge</b>		

Premium Total:  
**\$9,431.00**

← Back

Issue

# Technology Training

## Amend WC Premium Basis

# Amend WC Premium Basis

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

Latest Transactions									Get a Quote ▶	
Search		Name Insured								
Info	Account Name	Policy No.	Quote	Policy Type	Status	Effective	Expiration	Actions		
	AGT END 4-22 - ALL	S 8133429-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	<b>Endorse</b>   Renewal   View   More ▼		

Latest Transactions									Get a Quote ▶	
Search		Name Insured								
Info	Account Name	Policy No.	Quote	Policy Type	Status	Effective	Expiration	Actions		
	AGT END 4-22 - ALL	S 8133429-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	View   <b>More</b> ▼		
	AGT END 4-22 - GL	S 8133424-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	Endorse   Renewal (Quote)   Policy Notepad   Auto ID Cards   Create New Submission   Agency Download		
	AGT END 4-22 - GL	WC 2503964-00		WORK COMP	ISSUED	05/05/2014	05/05/2015	Renewal   Endorse   Policy Notepad   Auto ID Cards   Create New Submission   Agency Download		
	AGT END 4-22 - MULTI	S 8133428-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	Renewal   Endorse   Policy Notepad   Auto ID Cards   Create New Submission   Agency Download		
	AGT END FLOW - CPP	S 8132667-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	Endorse   Renewal (Quote)   Policy Notepad   Auto ID Cards   Create New Submission   Agency Download		



# 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:

- *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 - 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 <input type="checkbox"/>
<b>Transaction Description *</b>	AMEND PREMIUM BASIS FOR WC
<b>Endorsement Types</b>	<input type="checkbox"/> Amend Mailing Address <input checked="" type="checkbox"/> Amend Premium Basis for WC <input type="checkbox"/> Amend Pay Plan <input type="checkbox"/> Add 3rd Party Notice to Designated Person(s) or Organization(s) <input type="checkbox"/> Other Changes

  

Premium Basis Changes for WC	
Change Description *	Amend Premium Basis for WC



# Amend WC Premium Basis

- ❑ Click **Edit** to amend the WC Premium Basis.
- ❑ Click **Rate** to proceed.

The screenshot shows the 'Workers Compensation Summary' form. At the top, there are tabs: 'Account Information', 'Policy Details', 'Locations', 'Lob Details', 'Premium Summary', and 'Finalize Policy'. The 'Lob Details' tab is selected. Below the tabs, the 'Workers Compensation Summary' section is displayed. It includes a table for 'EMPLOYER'S LIABILITY' with the following data:

EMPLOYER'S LIABILITY	
Each Accident	100,000
Disease Each-Employee	100,000
Disease Policy-Limit	500,000
Total Number of Employees	3
Policy Information	Commercial

Below the table, there is a section for 'Excl 3C States' with a text box containing 'Included/Excluded Individuals - No Names Available'. To the right of the 'EMPLOYER'S LIABILITY' table, there is a red box around the 'Edit' button. Below the 'EMPLOYER'S LIABILITY' table, there is a section for 'Locations (1)' with a table containing one location:

Locations (1)	
Location 001   1 Building	40 WANTAGE AVE, BRANCHVILLE, NJ 07828

Below the 'Locations (1)' table, there is a red box around the 'Edit' button. To the right of the 'Workers Compensation Summary' section, there is a sidebar with a 'Rate' button at the top. Below the 'Rate' button, there is a 'Your Quote Summary' section with the following information:

ACCOUNT INFORMATION  
AGT END 4-22 - GL  
(568) 357-3478  
WORK COMP

POLICY DETAILS  
Selective Casualty Ins Co  
Lines of Business  
Workers Compensation  
SIC Code  
174102 | MASONRY - OTHER THAN

LOCATIONS (1)  
001 - 40 WANTAGE AVE | 1 Building

LOB DETAILS  
+ Workers Compensation

Below the 'Workers Compensation Summary' section, there is a 'Class Code Detail' section. It includes a table with the following data:

Class Code Detail	
Class Code	5022 MASONRY NOC (03)
Premium Basis	55,700

Below the 'Class Code Detail' table, there is a red box around the 'Premium Basis' field. Below the 'Class Code Detail' table, there is a text box containing the message: 'Enter Premium Basis. Valid values are 0 - 99999999 or IF ANY.' At the bottom of the form, there is a blue bar with buttons: 'Back', 'Cancel', 'Exit To Dashboard', and 'Rate'. The 'Rate' button is highlighted with a red box.

# Amend WC Premium Basis

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

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

Line of Business	Full Term	Non Qual Premium	Actual Premium	Coverage Extension	Market Size
Workers Comp	\$10,182.00		no charge		
Totals	\$10,182.00		no charge		

Premium Total:  
**\$10,182.00**

**ACTION REQUIRED**  
Premium shown is an indication only. Select Next to determine your authority to process the endorsement.

**Tools & Resources**

- Rating Worksheets
- Pricing
- Cover Letter
- Supplemental Applications
- Quote Proposal
- Modify Risk Grp/Add'l Exposures
- Facultative Reinsurance
- Global ITV Calculation

Submit For Review

Your Quote Summary

ACCOUNT INFORMATION  
AGT END 4-22 - GL  
(588) 357-3476  
WORK COMP

POLICY DETAILS  
Selective Casualty Ins Co  
Lines of Business  
Workers Compensation  
SIC Code  
174102 | MASONRY - OTHER THAI

LOCATIONS (1)  
001 - 40 WANTAGE AVE | 1 Building

LOB DETAILS  
Workers Compensation

Back | Cancel | Exit To Dashboard | **Next to Finalize Policy**

- ❑ Underwriting Review will display.
- ❑ Click **Next to Forms**

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

**Underwriting Review** | Forms

**Underwriting Review Results**

Underwriting Review Successful

Back | Print | Exit To Dashboard | **Next to Forms**

Status

- Underwriting Review
- Forms

# Amend WC Premium Basis

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

**REVIEW & ISSUE**

<b>Account Name &amp; Address</b> AGT END 4-22 - GL 40 WANTAGE AVE BRANCHVILLE, NJ 078266640 566.357.3478	<b>Policy Type</b> WORK COMP <b>Effective Date</b> 05/05/14 <b>Expiration Date</b> 05/05/15 <b>Business Type</b> none <b>Nature of Business</b> BESTINCLASINPUT	<b>Year Bus Began</b> 2009 <b>Ownership</b> INDIVIDUAL <b>Program Code</b> Special Contractors <b>SIC Code</b> 174102 MASONRY - OTH
---	---	--

Line of Business	Full Term	Non-Qual Premium	Actual Premium	Coverage Extensions	Mkt Size
Worker's Compensation	\$10,182.00		no charge		
<b>Total</b>	<b>\$10,182.00</b>		no charge		

Premium Total:  
**\$10,182.00**

← Back

**Issue**

# Technology Training

## Other Changes



# Other Changes

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

**Latest Transactions**

Search

Get a Quote ▶

Info	Account Name	Policy No.	Quote	Policy Type	Status	Effective	Expiration	Actions
	AGT END 4-22 - ALL	S 8133429-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	<b>Endorse</b>   Renewal   View   More ▼

**Latest Transactions**

Search

Get a Quote ▶

Info	Account Name	Policy No.	Quote	Policy Type	Status	Effective	Expiration	Actions
	AGT END 4-22 - ALL	S 8133429-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	View   <b>More</b> ▼
	AGT END 4-22 - GL	S 8133424-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	Endorse   Renewal (Quote)   <b>Endorse</b>   Policy Notepad   Auto ID Cards   Create New Submission   Agency Download
	AGT END 4-22 - GL	WC 2503964-00		WORK COMP	ISSUED	05/05/2014	05/05/2015	Renewal   Endorse   Policy Notepad   Auto ID Cards   Create New Submission   Agency Download
	AGT END 4-22 - MULTI	S 8133428-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	Renewal   Endorse   Policy Notepad   Auto ID Cards   Create New Submission   Agency Download
	AGT END FLOW - CPP	S 8132667-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	Endorse   Renewal (Quote)   Policy Notepad   Auto ID Cards   Create New Submission   Agency Download

# Other Changes

- ☐ Enter *Effective Date of Change*
- ☐ Select **Other Changes**
  - ☐ *Transaction Description* will prefill but can be modified
- ☐ Click **Next**

## Note:

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

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 \*

OTHER CHANGES

Endorsement Types

☐ Amend Mailing Address

☐ Amend Pay Plan

☐ Delete Terrorism Coverage

☐ Amend Premium Basis for GL

☐ Amend Contractor's Equipment Schedule

☐ Add/Delete/Amend Mortgagee(Property)

☐ Add/Delete/Amend Loss Payee (Property)

☐ Add/Delete/Amend Add'l Insured (Property)

☐ Add/Delete Identity Recovery Coverage

☐ Add/Delete/Amend GreenPac Coverage

☐ Add/Delete/Amend Crisis Response

☐ Add/Delete/Amend Vehicle or Add'l Insured

☐ Add/Delete/Amend Loss Payee(Vehicle)

☐ Add 3rd Party Notice to Designated Person(s) or Organization(s)

☒ Other Changes

Other Changes

Cancel

Next

# Other Changes

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

## Note:

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

AGT END 4-22 - ALL | Policy: S 813342900 | Trans: PCNM | Agent: LYONS INSURANCE AGENCY INC (04027-0000)

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

### Account Details

**Edit**

Agent Code	00-04027-00000 LYONS INSURANCE AGENCY INC
Predominant State	NEW JERSEY
Multi-State	No
Account Name	AGT END 4-22 - ALL
Client Number	
Mailing Address 1	41 WANTAGE AVE
Mailing Address 2	
Zip Code	07826-5640
City	BRANCHVILLE
State	NJ
Phone Number	759-827-7034
Inspection Contact	
Account New to the Agency?	Yes
Previous Policy Number	
Policy Number	S 813342900

### Policy Type

**Edit**

Effective Date	05/05/14
Expiration Date	05/05/15 Term: 1 YEAR
Policy Type	CPP PACKAGE

### Your Quote Summary

**ACCOUNT INFORMATION**  
AGT END 4-22 - ALL  
(759) 827-7034  
CPP PACKAGE

**POLICY DETAILS**  
Selective Fire and Casualty Ins Co  
Lines of Business  
Automobile, General Liability, Inland Marine, Property  
SIC Code  
174102 | MASONRY - OTHER THAN CHIM

**LOCATIONS (2)**  
001 - 40 WANTAGE AVE | 1 Buildings  
002 - 41 WANTAGE AVE | 1 Buildings

**LOB DETAILS**

- +** Automobile
- +** General Liability
- +** Inland Marine
- +** Property

◀ Back Exit To Dashboard Edit Account Information ▶

# 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.

AGT END 4-22 - ALL | Policy: S 813342900 | Trans: PCNM | Agent: LYONS INSURANCE AGENCY INC (04027-0000)

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

**Information:** Please contact your region using our "Submit for Review" Feature for Underwriting Approval. To complete LOSS PAYEE / MORTGAGEE CHANGES, Please access forms.

Line of Business	Full Term	Non Qual Premium	Actual Premium	Coverage Extension	Market Size
Auto	\$4,099.00		no charge	Epac	
General Liab	\$3,108.00		no charge	Epac	
Inland Marine	\$103.00		no charge		
Property	\$2,121.00		no charge		
<b>Totals</b>	<b>\$9,431.00</b>		no charge		

Premium Total:  
**\$9,431.00**

**ACTION REQUIRED**  
Premium shown is indication only. This endorsement is not available for agency issue. Please select **Submit for Review** to contact your Underwriter.

**Tools & Resources**

- Rating Worksheets
- Pricing
- Cover Letter
- Supplemental Applications
- Quote Proposal
- Modify Risk Grp/Add'l Exposures
- Facultative Reinsurance
- Global ITV Calculation

**Back** **Cancel** **Exit To Dashboard** **Next to Finalize Policy**

**Your Quote Summary**

**ACCOUNT INFORMATION**  
AGT END 4-22 - ALL  
(759) 627-7034  
CPP PACKAGE

**POLICY DETAILS**  
Selective Fire and Casualty Ins Co  
Lines of Business  
Automobile, General Liability, Inland Marine, Property  
SIC Code  
174102 | MASONRY - OTHER THAN CHIM

**LOCATIONS (2)**  
001 - 40 WANTAGE AVE | 1 Buildings  
002 - 41 WANTAGE AVE | 1 Buildings

**LOB DETAILS**

- Automobile
- General Liability
- Inland Marine
- Property



# 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

**SELECTIVE**  
Response is everything.

**Commercial Lines Automation System**  
Welcome, qa1\_agent qa1\_agent

---

**Contact Us by Phone or E-mail**

Phone - For CLAS software assistance, call 1-800-777-9656

E-mail Us - Fill out the required fields and select "Submit"

**My inquiry goes to: \***   (abc@xyz.com)

**Your Name:**

**Agent Number:**

**Name Insured:**

**Policy/Quote Number:**

**Your E-mail: \***

(abc@xyz.com) [Update E-mail Address](#)

**Comments/Questions: \***

# Technology Training

Issue Multiple Changes in One  
Transaction

# Issue Multiple Changes in One Transaction

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

**Latest Transactions**

Search

Get a Quote ▶

Info	Account Name	Policy No.	Quote	Policy Type	Status	Effective	Expiration	Actions
	AGT END 4-22 - ALL	S 8133429-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	<b>Endorse</b>   Renewal   View   More ▼

**Latest Transactions**

Search

Get a Quote ▶

Info	Account Name	Policy No.	Quote	Policy Type	Status	Effective	Expiration	Actions
	AGT END 4-22 - ALL	S 8133429-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	View   <b>More</b> ▼
	AGT END 4-22 - GL	S 8133424-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	Endorse   Renewal (Quote)   Policy Notepad   Auto ID Cards   Create New Submission   Agency Download
	AGT END 4-22 - GL	WC 2503964-00		WORK COMP	ISSUED	05/05/2014	05/05/2015	Renewal   Endorse   Policy Notepad   Auto ID Cards   Create New Submission   Agency Download
	AGT END 4-22 - MULTI	S 8133428-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	Renewal   Endorse   Policy Notepad   Auto ID Cards   Create New Submission   Agency Download
	AGT END FLOW - CPP	S 8132667-00		COMMERCIAL PKG	ISSUED	05/05/2014	05/05/2015	Endorse   Renewal (Quote)   Policy Notepad   Auto ID Cards   Create New Submission   Agency Download



# 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:

- 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	
<b>Effective Date of Change *</b>	<input type="text" value="__/__/__"/> <input type="checkbox"/>
<b>Transaction Description *</b>	<input type="text"/>
<b>Endorsement Types</b>	
<input type="checkbox"/> Amend Mailing Address	<input type="checkbox"/> Amend Pay Plan
<input type="checkbox"/> Delete Terrorism Coverage	<input type="checkbox"/> Amend Premium Basis for GL
<input type="checkbox"/> Amend Contractor's Equipment Schedule	<input type="checkbox"/> Add/Delete/Amend Mortgagee(Property)
<input type="checkbox"/> Add/Delete/Amend Loss Payee (Property)	<input type="checkbox"/> Add/Delete/Amend Add'l Insured (Property)
<input type="checkbox"/> Add/Delete Identity Recovery Coverage	<input type="checkbox"/> Add/Delete/Amend GreenPac Coverage
<input type="checkbox"/> Add/Delete/Amend Crisis Response	<input type="checkbox"/> Add/Delete/Amend Vehicle or Add'l Insured
<input type="checkbox"/> Add/Delete/Amend Loss Payee(Vehicle)	<input type="checkbox"/> Add 3rd Party Notice to Designated Person(s) or Organization(s)
<input type="checkbox"/> Other Changes	



# Issue Multiple Changes in One Transaction

- ❑ A section will appear for each endorsement type selected.
- ❑ Enter applicable information.
- ❑ Click **Next** to proceed.

The screenshot displays a software interface for issuing multiple changes in one transaction. It features four sections, each highlighted with a red box:

- Address Changes:** Includes fields for Change Description (Amend Mailing Address), Mailing Address 1 (41 WANTAGE AVE), Mailing Address 2, City (BRANCHVILLE), State (NEW JERSEY), and Zip (07826 5540).
- Contractor's Equipment Schedule Changes:** Includes a field for Change Description (Amend Contractor's Equipment Schedule).
- Mortgagee (Property) Changes:** Includes a field for Change Description (Update Mortgagee (Property)).
- GreenPac Changes:** Includes a field for Change Description (Add/Change/Delete GreenPac Coverage). Below this, the **Property GreenPac** section is expanded, showing details for GreenPac Property Increased Cost (Occurrence/Aggregate) and GreenPac Soft Cost (Occurrence/Aggregate).

At the bottom of the interface, there are two buttons: **Cancel** and **Next**. The **Next** button is highlighted with a red box.

# 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.

The screenshot displays the Selective Insurance system interface. At the top, there is a navigation bar with tabs: Account Information, Policy Details, Locations, Lob Details, Premium Summary, and Finalize Policy. Below this, a sub-navigation bar shows 'General Liability | Property | Inland Marine | Automobile'. The main content area is titled 'Contractors Equipment' and features a warning message: 'Warning: If deleting any equipment with loss payees, please update the loss payee form CM 71 95 with your changes.' Below the warning, the 'ClassCode' is 0205. The 'Scheduled' section is expanded, showing a table with one item: 'PROP DESC 1' with a 'Limit of Insurance' of '\$3,000'. The 'Total' is '\$3,000'. The 'Loss Payee' field is empty. The 'Special Provisions' section is also visible. On the right side, there is a 'Rate' button highlighted with a red box. Below the 'Rate' button is a 'Your Quote Summary' section. The bottom of the interface has a dark blue bar with 'Exit To Dashboard' and 'Rate' buttons, with the 'Rate' button highlighted with a red box.

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

General Liability | Property | Inland Marine | Automobile

Contractors Equipment

**Warning:** If deleting any equipment with loss payees, please update the loss payee form CM 71 95 with your changes.

ClassCode 0205

☐ Scheduled

☒ Contractors Equipment - Schedule

☐ Details

[+ Add Scheduled Item](#)

Item #	Description of Scheduled Property	Limit of Insurance	Actions
00001	PROP DESC 1	\$3,000	<a href="#">Delete</a>

Total : \$3,000

Loss Payee ☐

[+ Special Provisions](#)

[Exit To Dashboard](#) [Rate](#)

**Rate**

**Your Quote Summary**

ACCOUNT INFORMATION  
AGT END 4-22 - ALL  
(759) 627-7034  
CPP PACKAGE

POLICY DETAILS  
Selective Fire and Casualty Ins Co  
Lines of Business  
Automobile, General Liability, Inland Marine, Property  
SIC Code  
174102 | MASONRY - OTHER THAN CHIM

LOCATIONS (2)  
001 - 40 WANTAGE AVE | 1 Buildings  
002 - 41 WANTAGE AVE | 1 Buildings

LOB DETAILS  
[+ Automobile](#)  
[+ General Liability](#)  
[+ Inland Marine](#)  
[+ Property](#)

# Issue Multiple Changes in One Transaction

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

- ❑ Click **Next to Finalize Policy**

Line of Business	Full Term	Non Qual Premium	Actual Premium	Coverage Extension	Market Size
Auto	\$4,099.00		no charge	Epac	
General Liab	\$3,108.00		no charge	Epac	
Inland Marine	\$549.00		\$446.00		
Property	\$2,146.00		\$25.00		
<b>Totals</b>	<b>\$9,902.00</b>		<b>\$471.00</b>		

Premium Total:  
**\$471.00**

**ACTION REQUIRED**  
Premium shown is an indication only. Select Next to determine your authority to process the endorsement.

**Tools & Resources**

- Rating Worksheets
- Pricing
- Cover Letter
- Supplemental Applications
- Quote Proposal
- Modify Risk Grp/Add'l Exposures
- Facultative Reinsurance
- Global ITV Calculation

**Next to Finalize Policy**

- ❑ Underwriting Review will display.

- ❑ Click **Next to Forms**

**Underwriting Review** Forms

**Underwriting Review Results**

Underwriting Review Successful

**Next to Forms**

# 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

The screenshot displays the 'Forms' section of an insurance system. At the top, a navigation bar includes tabs for 'Account Information', 'Policy Details', 'Locations', 'Lob Details', 'Premium Summary', and 'Finalize F'. Below this, the 'Underwriting Review' section is active, showing a table of 'Incomplete Forms'.

Line Of Business	Name	Edition Date	Fill-In Status	Actions	Description
Property Forms	CP 76 23	10/11		<b>Complete Form</b>	PROPERTY MORTGAGE HOLDERS SCHEDULE

Below the table is a 'View Named Interests' button. To the left, there are 'Back' and 'Cancel' buttons.

The 'PROPERTY MORTGAGE HOLDERS SCHEDULE' form is shown below the table. It includes the following fields:

- Form Number: CP 76 23 10/11
- NAMES:
- Address1:
- Address2:
- City:
- State:
- Zip Code:
- ADD LOC/BLDG(S):

At the bottom of the form, there is an 'Add Name' button and a 'Return to Property Forms' button. A 'Copy Names' button is also visible in the top right corner of the form area.



# Issue Multiple Changes in One Transaction

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

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

**Forms**

Incomplete Forms Attached Forms

+ Common Forms Add / Remove / View Common Forms

+ Automobile Forms Add / Remove / View Automobile Forms

+ General Liability Forms Add / Remove / View General Liability Forms

+ Property Forms Add / Remove / View Property Forms

View Named Interests

Review / Issue

Status

✓ Forms

◀ Back Cancel Exit To Dashboard Next ▶

# Issue Multiple Changes in One Transaction

- ❑ 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		
<b>Total</b>	<b>\$9,431.00</b>		<b>no charge</b>		

Premium Total:  
**\$9,431.00**

← Back

Issue

For further assistance, please contact us: 800.777.9656, option 3 or [BSUTechnicalSupport@selective.com](mailto:BSUTechnicalSupport@selective.com).