

Agent Portal

Amend Mortgagee

Reference Guide | HOMEOWNERS



Mortgagee Changes Overview

EDIT existing mortgagee

Change details – begin on “Interested Parties” tab

1. If the mortgagee details are changed and,
2. there is no Premium change,

...the changes are done as soon as they are submitted and do not require UW review.

OR

ADD or DELETE Mortgagee

Begin on “Discount & Charge Verification” tab

1. If a mortgagee is added or deleted from a policy and,
2. there is a Premium change,

...the change is sent to Underwriting for review before it is processed.

Expanded Search Options

NEW
FEATURE

➤ Click “Search” from the home screen

You are logged in as: **NANCY MARSHALL** | [Log Out](#) | [Edit Profile](#) | [Login Disclaimer...](#) | 10000389, MISSIONSELECT DEMO AGENCY, 6434 WESTWARD WOOD WAY, HUMBLE, TX 77338 | [Browser Compatibility Info](#)

[Home](#) | [Search](#) | [Quotes](#) | [Policies](#) | [Help](#) | [Dashboard](#) | [Reports](#)

News
Looking to service a policy effective before 11/1/2019, OR Begins with KOP or PKC. [Please Login Here](#)

New Quotes (within last 30 days)

Agency Id	Named Insured	Quote	LOB	State	Status	Eff Date	Premium
-----------	---------------	-------	-----	-------	--------	----------	---------

New Policies (within last 30 days)

Agency Id	Named Insured	Policy	LOB	State	Status	Eff Date	Premium
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1. Search for Policy
2. Enter Policy Number, Name, Address, Phone, etc.
3. Click on Search

☒ Policy ☐ Quote

POLICY/QUOTE INFO

Policy/Quote Number Custom Number

Line Of Business Term

PERSONAL

SSN

First Name Last Name

Trust/Estate Name

ADDRESS

Street

Zip/Postal Code -

State

City

CONTACT INFO

Custom Customer Number

Email

Phone

Policies Cancelled (within last 30 days)

Agency Id	Named Insured	Policy	LOB	State	Cancel Date	Reason	Conv. Pol. No.
10000389	TEST, TEXAS	0119804879	Homeowner	TX	9/21/2019	Cancellatio...	tdatconver...

Page 1 of 0 Page size: 10 No data to display

Policies Renewed (within last 30 days)

All Transactions (within last 30 days)

Unpaid Mortgage Policies

Displaying 1 - 1 of 1

Mortgagee – Interested Parties

ADDITIONAL INSURED'S

Create New Additional Insured

MORTGAGEES

Create New Mortgagee

WELLS FARGO

Mortgage Type	Primary Mortgage
Loan Number	123
Mortgagee	WELLS FARGO
Street	PO BOX 420722
Suite/Apt/Other	
Zip/Postal Code	78842 - 0722
Bill To	No

Delete Edit

1. Select "Interested Parties" tab

2. Click on "Edit" to get in "Amend mode"

Mortgagee Details

1. Edit Mortgagee details: Just type over, or delete and type
2. Click "Save"


Edit Mortgagee

MORTGAGEE

Mortgage Type	Primary Mortgage ▼
Loan Number	123
Mortgagee	WELLS FARGO ATIMA/ISA
Street	PO BOX 420722
Suite/Apt/Other	
Zip/Postal Code	78842 - 0722
State/Province	TX ▼
City	DEL RIO
Bill To	<input type="radio"/> Yes <input checked="" type="radio"/> No

CancelSave

Preview Changes

 **Info:** Don't forget to submit your changes!

close

1. Pop up Reminder
2. Preview Changes

Homeowners Policy

Summary

Insured

Payments

Documents

Cancel Changes

Preview Changes

Name	JOHNNY CASH	Total Term Balance	\$0.00
Home Phone		Payment Method	Recurring CC
Phone	(987) 979-8798	Next Payment Due	\$0.00
Email		Last Payment Made	(\$359.50) on 1/12/2020
Policy#	0119804834		
Status	Active		
Effective	6/16/2019		
Expires	6/16/2020		
MISSIONSELECT DEMO			

View History

View Payment History

Pay Now

Change Summary - Review changes

Endorsement Save

Change Summary

Confirmation

Mortgagee was changed from **QUACKEN LOANS** to **QUACKEN LOANS ATIMA/ISAOS** on Mortgagee(QUACKEN LOANS | 4962 ANCIENT ELM | SAN ANTONIO | TX | 78247 | Primary Mortgage |).

Screen	Field	Initial Value	Modified Value
Mortgagee(QUACKEN LOANS 4962 ANCIENT ELM SAN ANTONIO TX 78247 Primary Mortgage)	Mortgagee	QUACKEN LOANS	QUACKEN LOANS ATIMA/ISAOS

Effective Date

1. Review changes and click "Submit changes."
2. If there is no change in premium, it will process without going to Underwriting.

OR

3. Click "Cancel Changes" if you are not ready yet.

**NEW
FEATURE**

Confirmation

Endorsement Save

Change Summary

Confirmation

Policy 0119827363 Saved Successfully!

Close

1. Confirmation
2. See Documents for updated Declarations page

Homeowners Policy			
Summary	Insured	Payments	Documents
Upload Documents			
Document	Description	Category	Date Created
MSELECT-DEC-DEC PAGE AI-NO CERT-20201014-0119827363-0.pdf	DEC	Declaration - Amendment	02/27/2020 09:01:01
MSELECT-DEC-DEC PAGE-NO CERT-20201014-0119827363-0.pdf	DEC	Declaration - Amendment	02/27/2020 09:01:00

Add or Delete Mortgagee

1. Select "Discount & Charge Verification" tab
2. Click on "Endorse Policy" to put the policy in "amend mode"
3. Then edit the number of Mortgagees if you are adding or deleting.

The screenshot shows a web interface with a navigation bar at the top containing five tabs: "Dwelling Value", "Discount & Charge Verification", "Coverage", "Interested Parties", and "Loss History". The "Discount & Charge Verification" tab is selected and highlighted with a red circle. Below the navigation bar, the main content area is titled "DISCOUNT AND SURCHARGES". In the top right corner of this area, there is a teal button labeled "Endorse Policy", which is also circled in red. The form contains several fields with radio button options and information icons:

Field	Options	Info Icon
Number of permanent residents?	1	
Are all water heaters and washing machines located on the ground floor?	<input checked="" type="radio"/> Yes, <input type="radio"/> No	Yes
Swimming Pool/Spa?	<input type="radio"/> Yes, <input checked="" type="radio"/> No	
Monitored Alarms?	None	Yes
Number of mortgagees	0	Yes
Companion Policy?	Yes	Yes
Is the home in a gated community?	<input type="radio"/> Yes, <input checked="" type="radio"/> No	Yes
Prior Coverage or New Purchase?	<input checked="" type="radio"/> Yes, <input type="radio"/> No	
Are there any chargeable Losses on Property to be insured within the last 3 years?	<input type="radio"/> Yes, <input checked="" type="radio"/> No	Yes

Make Changes

Dwelling Value

Discount & Charge Verification


Coverage

Interested Parties

Loss History

Monitored Alarms?	None	i
Number of mortgagees	1	i
Loan Year	2015	i
Companion Policy?	<input checked="" type="radio"/> Yes <input type="radio"/> No	i
Is the home in a gated community?	<input type="radio"/> Yes <input checked="" type="radio"/> No	i
Prior Coverage or New Purchase?	<input checked="" type="radio"/> Yes <input type="radio"/> No	
Are there any chargeable Losses on Property to be insured within the last 3 years?	<input type="radio"/> Yes <input checked="" type="radio"/> No	i
Number of losses at current or prior location within last 3 years?	0	
MS HO 811 Specified Building Exclusion	<input type="radio"/> Yes <input checked="" type="radio"/> No	

Save

 Info: Don't forget to submit your changes!

close

1. Make changes by editing the number of mortgagees if you are adding or deleting.
2. You may also need to add a "Loan Year"
3. Click 'Save'


Change Mortgage Details

The screenshot shows a navigation bar with five tabs: 'Dwelling Value', 'Discount & Charge Verification', 'Coverage', 'Interested Parties', and 'Loss History'. The 'Interested Parties' tab is selected and circled in red. Below the tabs, there are two sections: 'ADDITIONAL INSURED'S' with a 'Create New Additional Insured' button, and 'MORTGAGEES' with a 'Create New Mortgagee' button. The 'Create New Mortgagee' button is circled in red.

1. Select "Interested Parties" tab
2. Click on "Create New Mortgagee" to add New mortgagee
3. Or "Delete" to remove one
4. Enter Mortgagee Details
5. The address will validate
6. Click "Save"

The screenshot shows the 'Create Mortgagee' form. The form has a title 'MORTGAGEE' and several input fields: 'Mortgage Type' (dropdown menu with 'Primary Mortgage' selected), 'Loan Number' (text field with '123'), 'Mortgagee' (text field with 'WELLS FARGO'), 'Street' (text field with 'PO BOX 420722'), 'Suite/Apt/Other' (text field), 'Zip/Postal Code' (text field with '78842' and a hyphenated field), 'State/Province' (dropdown menu), 'City' (text field), and 'Bill To' (radio buttons for 'Yes' and 'No', with 'No' selected). At the bottom, there is a 'Did you mean?' section with the address 'PO BOX 420722 DEL RIO TX 78842-0722' and a 'Use this address' button. On the right side, there are 'Cancel' and 'Save' buttons, with the 'Save' button circled in red.

Preview Changes

 **Info:** Don't forget to submit your changes!

close

1. Pop up Reminder
2. Preview Changes

Homeowners Policy

Summary

Insured

Payments

Documents

Cancel Changes

Preview Changes

Name	JOHNNY CASH	Total Term Balance	\$0.00
Home Phone		Payment Method	Recurring CC
Phone	(987) 979-8798	Next Payment Due	\$0.00
Email		Last Payment Made	(\$359.50) on 1/12/2020
Policy#	0119804834		
Status	Active		
Effective	6/16/2019		
Expires	6/16/2020		
MISSIONSELECT DEMO			

View History

View Payment History

Pay Now

Change Summary - Review changes

Endorsement Save

Change Summary **Confirmation**

Written Premium (Remaining Policy Premium) was calculated from initial: **\$664.00 to \$735.00. Mortgagee(WELLS FARGO | PO BOX 420722 | DEL RIO | TX | 78842 | Secondary Mortgage | 456)** was added . Number of mortgagees was changed from **1** to **2** on DiscountAndCharge.

Screen	Field	Initial Value	Modified Value
Premium	Written Premium (Remaining Policy Premium)	\$664.00	\$735.00
Mortgagee(WELLS FARGO PO BOX 420722 DEL RIO TX 78842 Secondary Mortgage 456)	Add Mortgagee		WELLS FARGO PO BOX 420722 DEL RIO TX 78842 Secondary Mortgage 456
DiscountAndCharge	Number of mortgagees	1	2

Effective Date

1. Review and "Submit Changes" if you want to send to Underwriting
2. If there is a Premium change it will go to UW for review before being processed
3. "Cancel Changes" if you are only quoting to see what the premium change would be

**NEW
FEATURE**

Sent to Underwriting - Confirmation

Endorsement Save

Change Summary

Confirmation

Your request has been sent to Underwriting for processing.

Close

Documents

1. Go to Documents tab
2. Endorsement receipt available to print

Help Dashboard Reports Policy 0119804834: CASH

Homeowners Policy

Summary Insured Payments **Documents**

Upload Documents Search:

Document	Description	Category	Date Created
MSELECT-RCPT-0119804834.pdf	Endorsement Receipt	Declaration - Amendment	02/07/2020 10:18:10



Missionselect Insurance Services, LLC
P.O. Box 271122
Flower Mound, TX 75027-1122

Endorsement Receipt

Policy Number: 0119804834

Endorsement Effective Date: 02/07/2020

Insured Name: Johnny Cash

Transmitted Date and Time: 02/07/2020 12:32 PM PT

Request 1 of 2

The requested policy modification(s) resulted in a change to Written Premium (Remaining Policy Premium) from \$2,705 to \$2,903.

Request 2 of 2

Clause 2 - All Other Perils was changed from 2% to 1% on Coverage.

I agree to the above requested changes.

Insured Signature

Producer Signature

All endorsements must meet eligibility requirements and **are not effective until approved and processed by our Underwriting Department.**

Producers please keep a signed copy for your records.

NEW
FEATURE

3. Have insured sign Endorsement receipt
4. Save as PDF

Upload Documents

NEW
FEATURE

Homeowners Policy

Summary Insured Payments **Documents**

Upload Documents Search:

Document	Description	Category	Date Created
Chg Deductible.pdf	Chg Deductible	Evidence Provided	02/07/2020 13:05:55

Upload Documents

DOCUMENT INFORMATION

Description Chg Deductible

Category Evidence Provided

ATTACHMENTS

Chg Deductible.pdf-20928 bytes **Attach Files** **Cancel** **Save**

1. Upload signed documents to UW
2. Description (20 characters or less)
3. File name (20 characters or less)
4. Attach files
5. "Save"

Documents

After Underwriting has finished processing the requested Endorsement, click 'Documents' tab for Declarations and Policy Docs.

Homeowners Policy

Summary Insured Payments **Documents**

Upload Documents Search:

Document	Description	Category	Date Created
MSELECT-RCPT-0119804834-0.pdf	Endorsement Receipt	Declaration - Amendment	02/07/2020 12:32:54
MSELECT-DEC-DEC PAGE-NO CERT-20200207-0119804834.pdf	DEC	Declaration - Amendment	02/07/2020 12:20:30

Summary of New Features



1. Expanded Search Options:

- Named Insured
- Address
- Phone Number
- Policy Number

2. Online Endorsement Request:

- Save to submit to Underwriting
- Don't Save to Quote policy changes
- Endorsement receipt of policy changes

3. Upload Documents:

- Provide signed documents to Underwriting

CONTACT INFORMATION:

Underwriting Email: Underwriting@missionselect.com

Phone: 800-780-6941

Thank You



Mission**Select**
Insurance