# **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

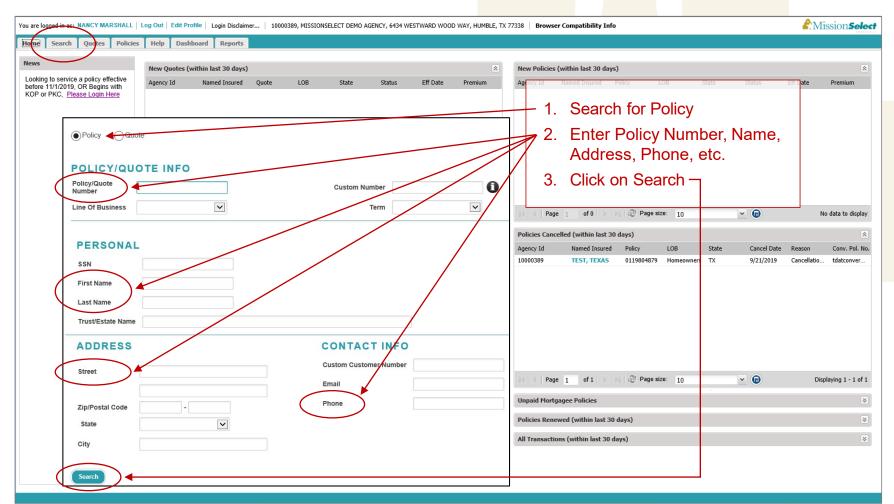
- 1. If a mortgagee is added or deleted from a policy and,
- 2. there is a Premium change,

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

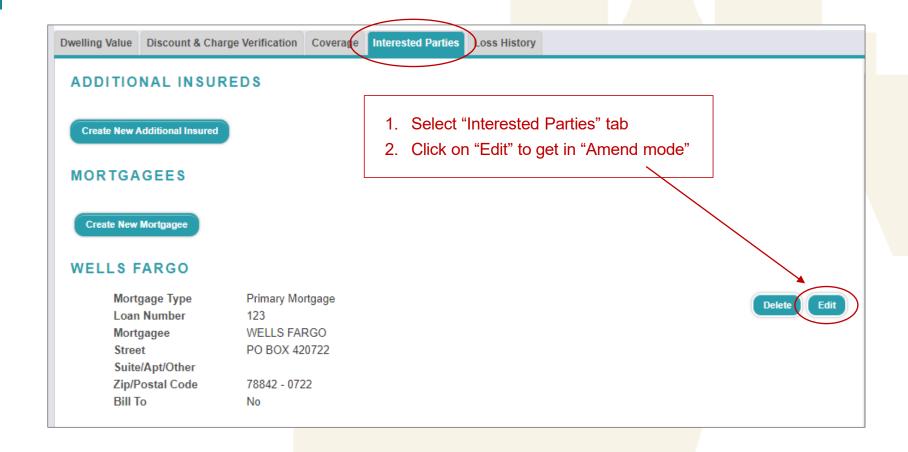
# **Expanded Search Options**



Click "Search" from the home screen

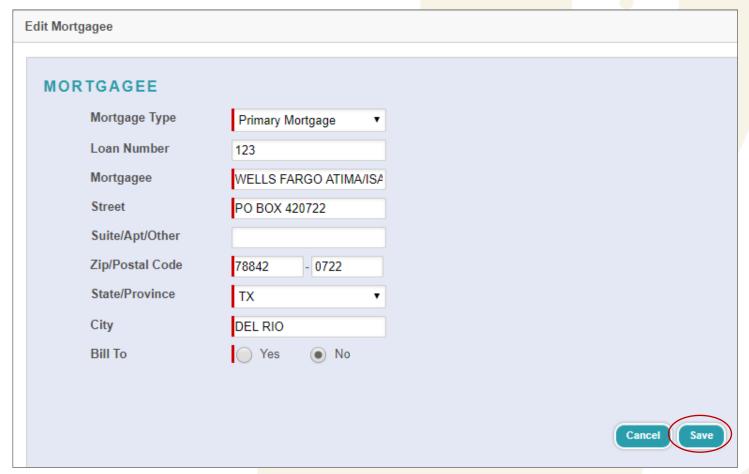


# Mortgagee – Interested Parties

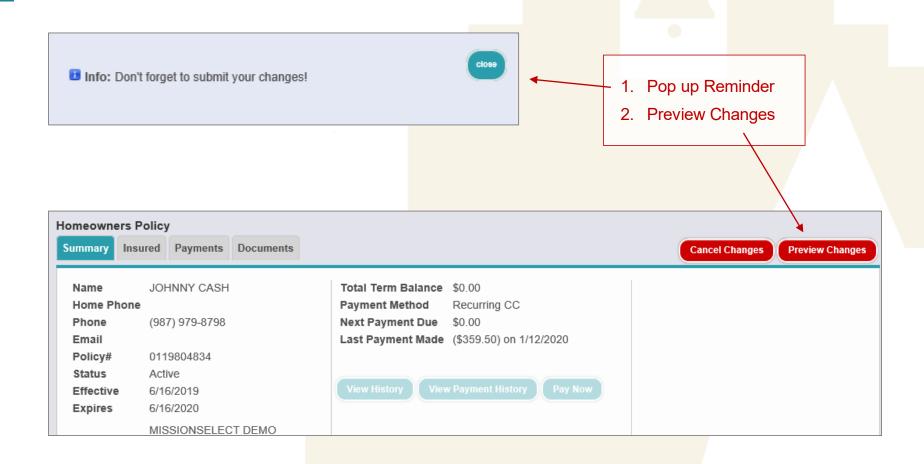


# Mortgagee Details

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

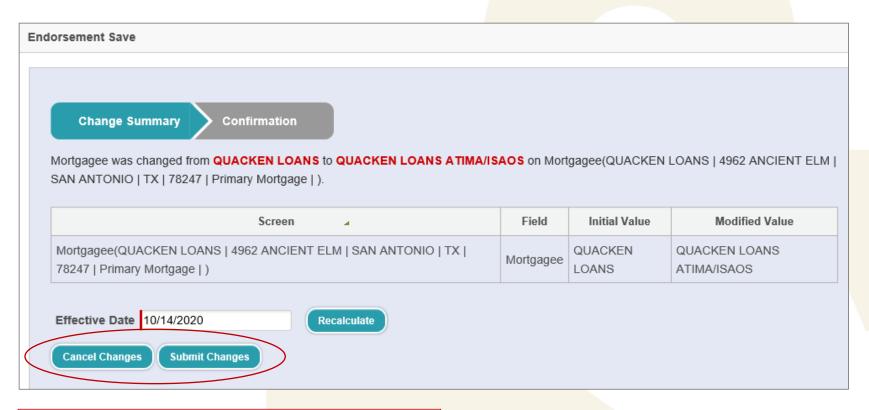


# Preview Changes



www.MissionSelect.com

# Change Summary - Review changes



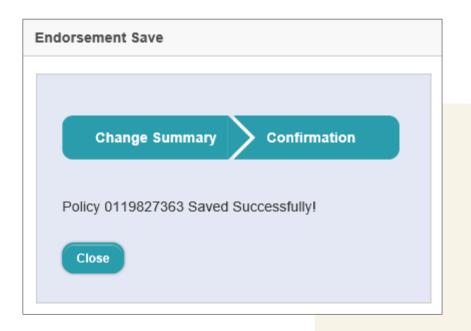
- 1. Review changes and click "Submit changes."
- 2. If there is no change in premium, it will process without going to Underwriting.

#### **OR**

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



#### Confirmation

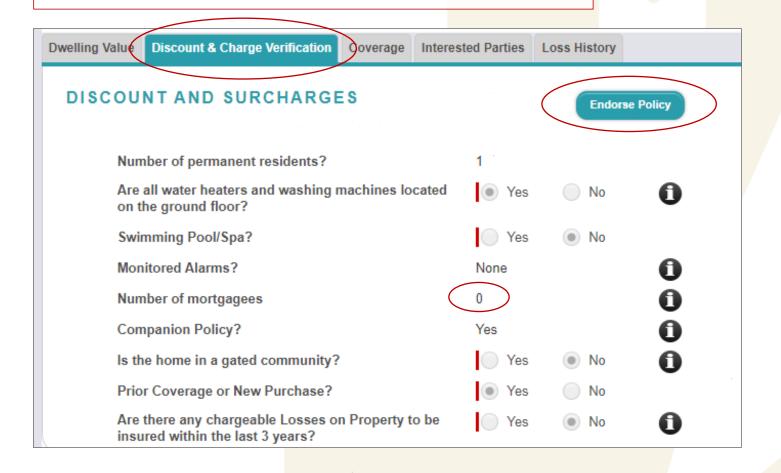


- 1. Confirmation
- 2. See Documents for updated Declarations page

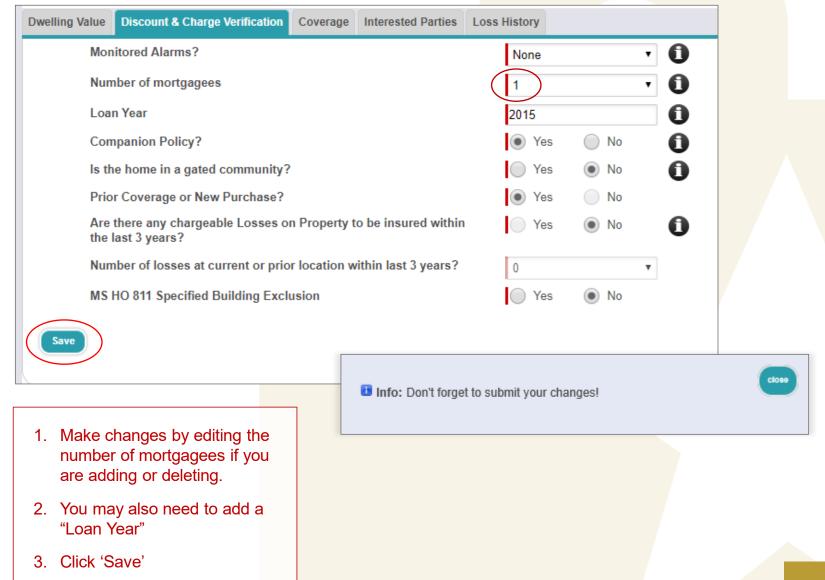


### Add or Delete Mortgagee

- 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.

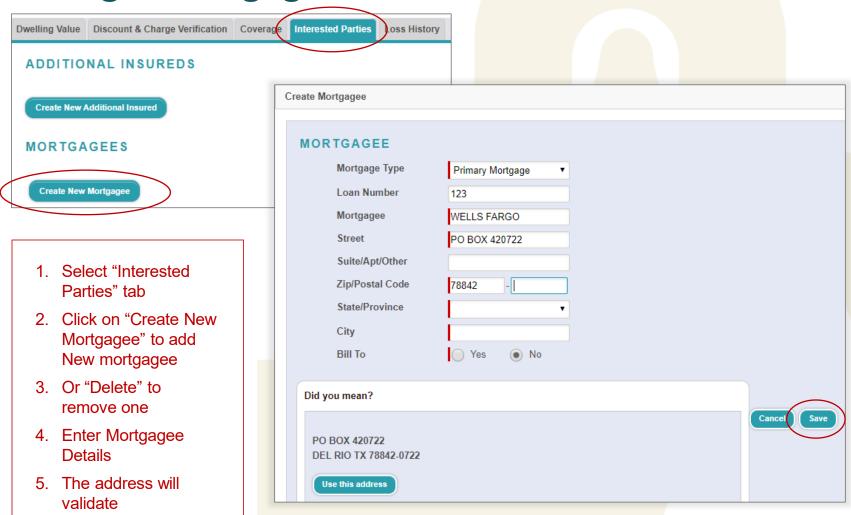


### Make Changes

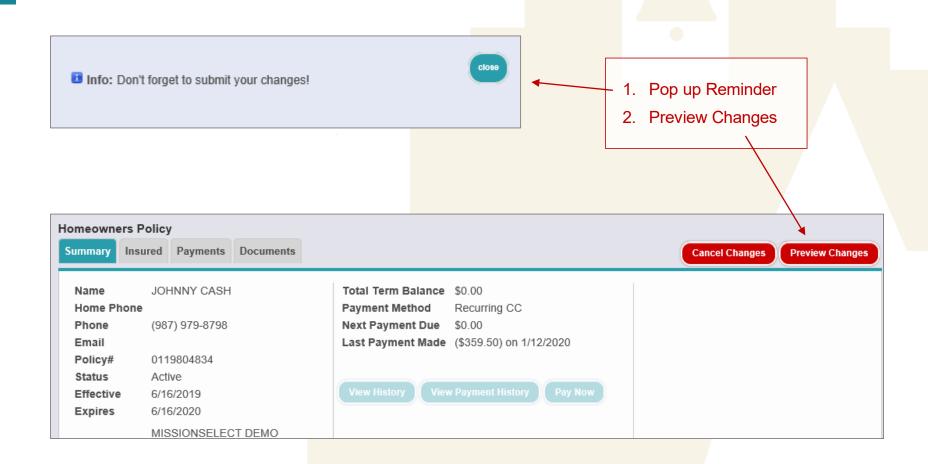


# Change Mortgage Details

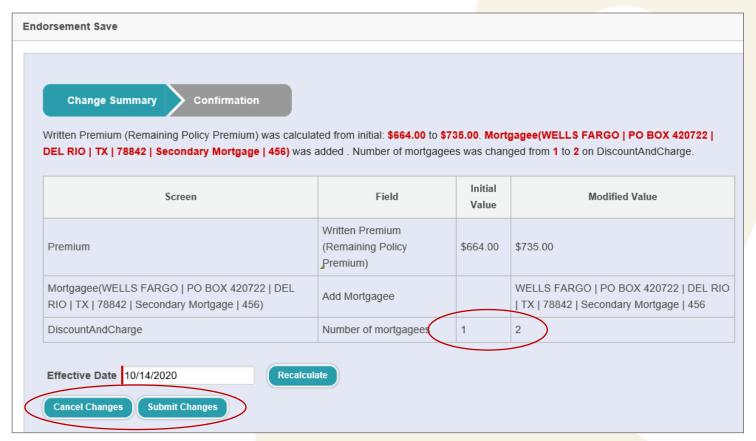
6. Click "Save"



# Preview Changes



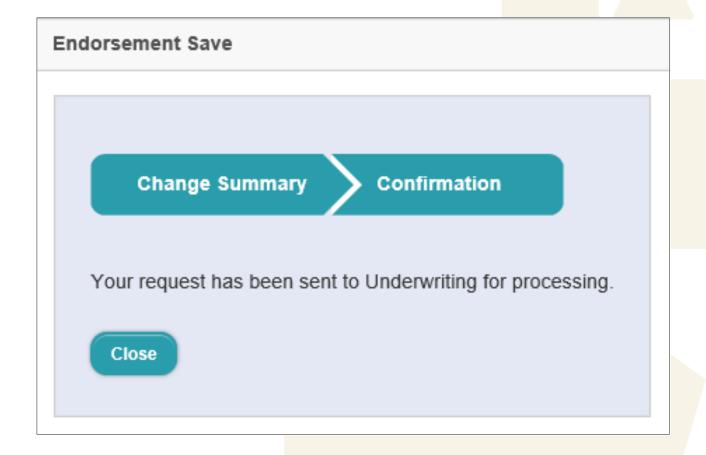
# Change Summary - Review changes



- 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

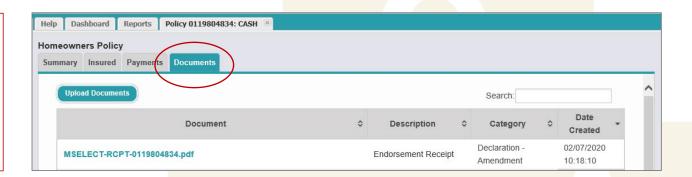


# Sent to Underwriting - Confirmation



#### **Documents**

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





#### **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.

Insured Signature Producer Signature

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

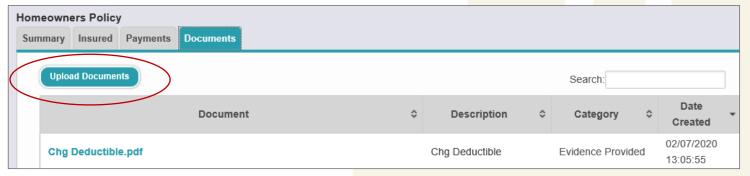
Producers please keep a signed copy for your records.

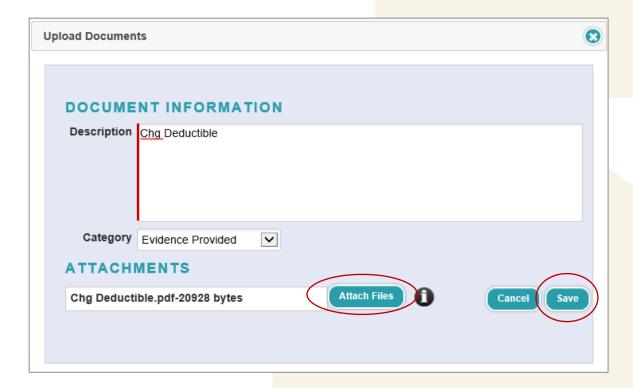


- 3. Have insured sign Endorsement receipt
- 4. Save as PDF

# Upload Documents







- 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.



#### 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: <u>Underwriting@missionselect.com</u>

Phone: 800-780-6941

# Thank You

