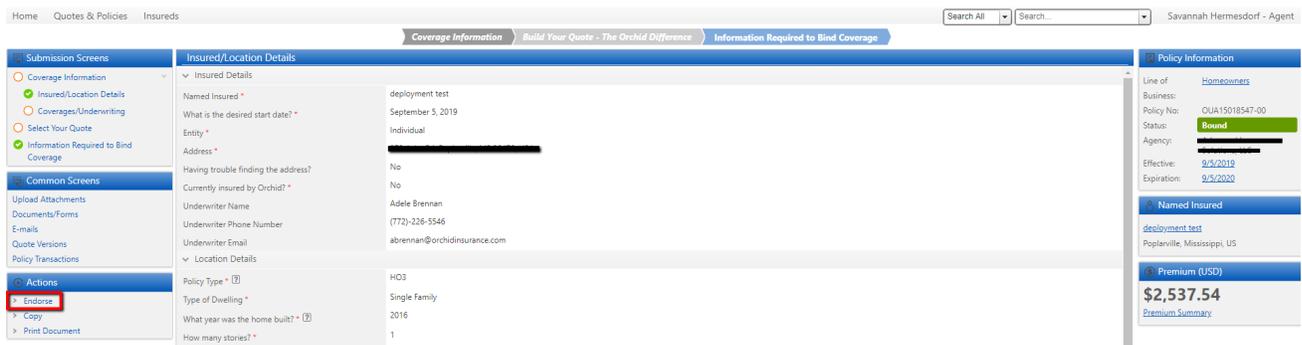# How to Request Policy Endorsements

To make any changes to a bound policy, you will have to request an endorsement. This is useful for changing mortgagees, changing mailing address, or changing coverage options. Once you are in the bound policy in Connect, click "Endorse" in the Actions box on the left-hand side.
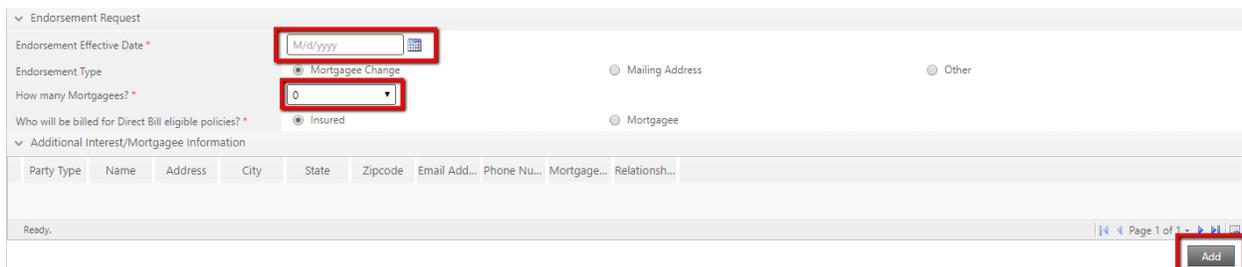

This will bring up the Endorsement Request screen.

Choose the **endorsement effective date**, and then select the **type of endorsement**:

- **Mortgagee Change:** Change the mortgagee on the policy.
- **Mailing Address:** Change the mailing address on the policy.
- **Other:** Any other changes to the policy, such as changes to Coverage A or Coverage B.

To Change Mortgagee(s):

With "Mortgagee Change" selected as the Endorsement Type, choose the number of mortgagees. Click "Add" to input the mortgagee information.

Once you click "Add", a pop-up box will open, prompting you to input the mortgagee's information.

After hitting save and close, you will see the information in the grid. Make sure that the number answered for "How many Mortgagees?" is the same number of mortgagees in the grid. You can now click the next arrow to move on.

Once you click next, your endorsement will either be approved for a bind request (see page 5) or referred to our processing department for completion (see page 4).

To Change Mailing Address:

With "Mailing Address" selected for Endorsement Type, answer "No" to "Is the mailing address the same as the Insured location". Enter in the new mailing address and click the next arrow.

After clicking the next arrow, your request will either be approved for a bind request (see page 5) or will need to be submitted for referral (see page 4).

To Request a Different Endorsement:

With "Other" selected as the Endorsement Type, describe the endorsement needed in the text box (e.g., "Increase Coverage A to $340,000"). Then click the next arrow. This will be a referred endorsement and will submit the request to our processing department for review.

Referred

If the endorsement needs to be referred, you will be asked to add an alternative agency contact and email:

Click the "Submit Referral" button to submit the endorsement request to our processing department.

Approved

If the endorsement is approved, you will be able to Request Bind. Verify that all the information is correct and select "Yes" for "I confirm that the requested changes are complete and accurate". Then click on the "Request Bind" button. The documents will be emailed over as soon as they are complete.