

Policy - Endorse a Policy

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Overview:

Endorsements are entered in Agency Systems to track changes during a policy term. In Policy Express we have simplified the process by implementing a wizard based processing module. This new enhanced module allows you to copy Acord forms to the new sequence as well as creating a follow up via the Diary/Suspense module. This document will walk you through the process of endorsing a policy via the Policy Express module.

Process:

From Policy Express select **Automated Procedures -> Endorse Policy**.

Enter your transaction code for Endorsements.

NOTE: *If you do not know the code left click on All Transactions just to the right of the transaction code field.*

Enter the Effective Date of the Endorsement.

NOTE: *You may select the drop down box to view a calendar and select a date.*

Enter a brief description for the endorsement

NOTE: *This will identify the endorsement and display under the Policy Transactions section in View Existing Items.*

If you would like to create a follow up item, place a check in the Create Suspense checkbox.

NOTE: *This will create a diary item which will show on the operator's ToDo list, the Basic tab for the client, the Diary tab for the client and under Suspense section from the View Existing Items in Policy Express.*

Enter the suspense date desired.

NOTE: *You may select the drop down box to view a calendar and select a date.*

Enter a brief description for the follow up.

NOTE: *This will be the information that shows on the To/Do tab.*

Enter a synopsis of the diary item.

NOTE: *This will show in the details of the diary.*

Select **Next** to continue.

Test Name 123I - 9898989814 - Policy Express

9898989814
 Dwelling Fire written with Policy Main Company
 Policy Term 09/15/2011 through 09/15/2012
 Renewal Business is effective 09/15/2011
 Department Personal Lines
 Producer Don Carl Smith

Transaction Code: END Endorsement

Effective: 10/27/2010

Policy Tag: Added Driver

Create Suspense: 11/03/2010

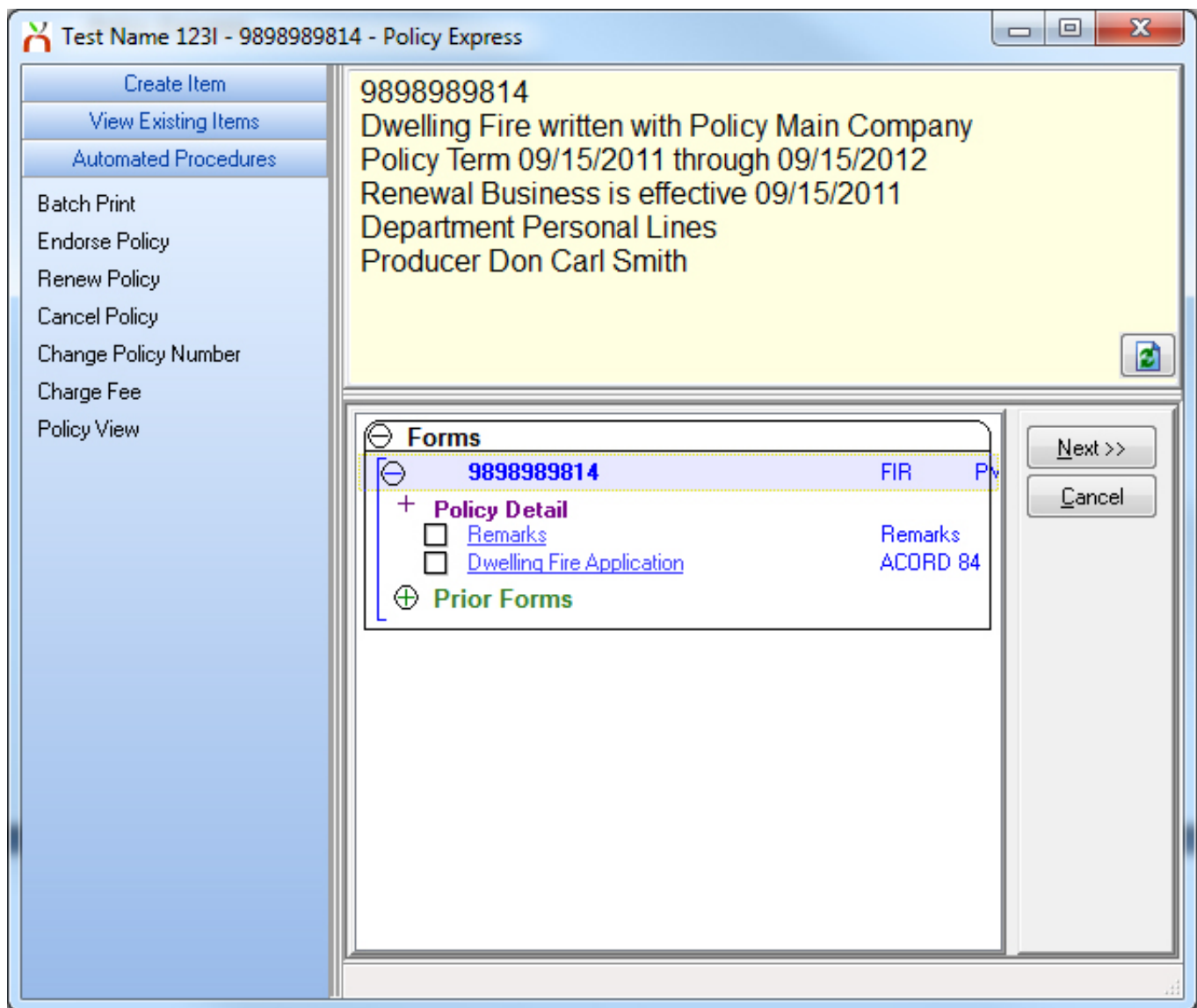
Suspense Description: Description

Policy Log: Body of the details in the diary

Next >> Cancel

Select any forms you would like to copy to the endorsement and select **Next** to complete the process.

NOTE: The most recent forms will be listed, and older revisions of that form are listed under the Prior Forms.



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