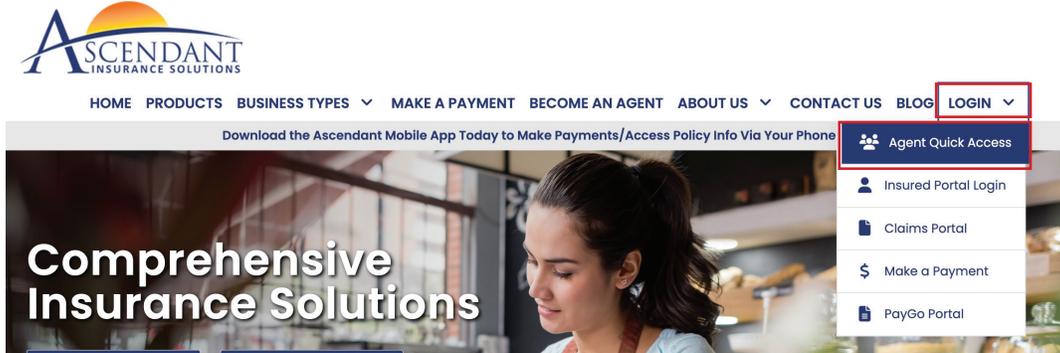




# ASCENDANT COMMERCIAL INSURANCE COMMERCIAL AUTO Endorsement Processing Guidelines

## HOW TO PROCESS ENDORSEMENTS ONLINE

Access the **Agent Portal** under the login dropdown menu and select **Agent Quick Access**.



Click on the **Policies** tab to search for the policy to endorse.

Filter your search by entering the **Policy Number** or **Insured Name**. Click the **file icon** to open the policy.



Click the **Endorsement** tab to add a new endorsement and/or view saved endorsement history.

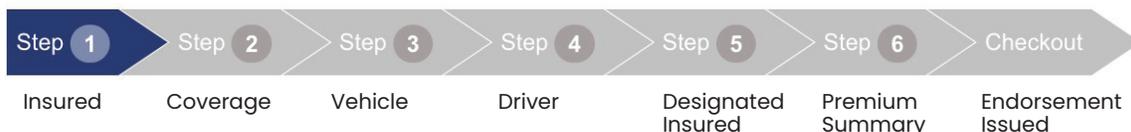


Click the **Add New Endorsement** button to start a new endorsement, or click on the file icon under the **ACTION** column to retrieve a saved endorsement.



## NAVIGATING THE ENDORSEMENT PROCESS

There are two ways to navigate through the endorsement process. After entering the required effective date and brief description on Step 1, **use the navigational arrow buttons** at the top of the page to go directly to the section corresponding to the changes you wish to amend or **use the "Next" button** to continue to the next step.



## STEP 1 – Insured Information

- Enter **Endorsement Effective Date** – today's date or future date.
- Enter a **brief description** for the endorsement. The description is for your use to quickly find saved endorsements, and will not display on the endorsement – ie. Add new driver.

**Next** Click **Next** to continue to **Step 2** or select your desired step.

**Save Work** Click **Save Work** to save the endorsement request and work on it later.

**Checkout** Click **Checkout** when you are ready to issue an endorsement or submit for approval.

Fields with a grey background are required.

## STEP 2 – Coverage Information

- Edit **Liability Limits, Uninsured Motorist, and/or Medical Payments.**
- Add/Delete **Additional Coverages.**

### STEP 3 – Vehicle Information

Step 1 Step 2 Step 3 Step 4 Step 5 Step 6 Checkout Save Work

**Add Vehicles**

Edit	Delete	Veh Num	Year	Make	Model	V.I.N.
<a href="#">Edit</a>	<a href="#">Delete</a>	1	2007	FREIGHTLINER	M2 106	1FVACWCS05HY26442
<a href="#">Edit</a>	<a href="#">Delete</a>	2	2003	FREIGHTLINER	M2 106	1FVACWNS07HY11539
<a href="#">Edit</a>	<a href="#">Delete</a>	3	2000	International	4900	2HTSDAAMXYH300302
<a href="#">Edit</a>	<a href="#">Delete</a>	4	2012	HINO	238	2PVNE2JT1C4565169
<a href="#">Edit</a>	<a href="#">Delete</a>	5	2017	FREIGHTLINER	M2 106	1FVACWYTSBDAX4742

- Click **Add Vehicles** button to add new vehicle(s).
- Click the **Edit** button next to the vehicle to make a change.
- Click the **Delete** button next to the vehicle to remove it.

Step 1 Step 2 Step 3 Step 4 Step 5 Step 6 Checkout Save Work

V.I.N.

Type

Year

Make

Model

G.V.W. / G.C.W.

Radius

Size

Use

Industry Type

Industry Class

Is Vehicle Leased  Yes  No

Include Physical Damage  Yes  No

Vehicle Cost New

PD Deductible Comprehensive

PD Deductible Collision

Garaged Zip/City

County/State

Loss Payee

Additional Insured

Name	Address 1	Address 2	City	State	Zip Code
<input type="text"/>					

- Add/Delete/Edit **Loss Payee & Additional Insured.**
- Edit the garaging zip code.

### STEP 4 – Driver Information

Step 1 Step 2 Step 3 Step 4 Step 5 Step 6 Checkout Save Work

**Add Drivers** **Get Drivers MVRs**

Edit	Delete	Status	MVR	Drivers License	Owner/Officer	First Name	Last Name	DOB	Age	State	Score
<a href="#">Edit</a>	<a href="#">Delete</a>	ACCEPTABLE		0632-500-77-221-0	No	ROBERT	ORTEGA	06-05-1973	39	FL	0
<a href="#">Edit</a>	<a href="#">Delete</a>	ACCEPTABLE		C000-519-55-205-0	No	JOHN	COOEY	10-03-1955	61	FL	0
<a href="#">Edit</a>	<a href="#">Delete</a>	ACCEPTABLE		R362-000-81-147-1	No	ADRIAN	RODRIGUEZ	08-02-1981	35	FL	0
<a href="#">Edit</a>	<a href="#">Delete</a>	ACCEPTABLE		F630-423-83-282-0	No	DAVID	FONT	01-29-1983	24	FL	0

Fields with \* are required

Previous Next

Step 1 Step 2 Step 3 Step 4 Step 5 Step 6 Checkout Save Work

License No.  State

(FXXX-XXX-XX-XXX-X)

Owner or Corp Officer  Yes  No

Detailed driver information will be obtained from the MVRs.

Save and Close Save Add Another Driver Cancel and Close

- Click the **Add Drivers** button to enter the driver’s license number.
- **Answer question:** Is the driver an owner or corporate officer? Select Yes or No.
- Click the **Save and Close** button to add only one driver to the endorsement.
- Click **Save Add Another Driver** to add more than one driver to endorsement.
- Click **View MVR** to review the driver’s current MVR.

**NOTE:** Unacceptable drivers cannot be added to the policy and must be removed from the driver list to process the endorsement.

## STEP 5 – ADD DESIGNATED INSURED

Step 1 Step 2 Step 3 Step 4 Step 5 Step 6 Checkout Save Work

Add Designated Insured

No Designated Insured has been added.

Fields with \* are required.

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Step 1 Step 2 Step 3 Step 4 Step 5 Step 6 Checkout Save Work

Name \*

Address \*

City \*

State \*

Zip Code \*

Save and Close Save and Add Another Cancel

No Designated Insured has been added.

Fields with \* are required.

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- Click **Add Designated Insured** - entity that asks to be the named insured for vicarious liability under the policy.
- Enter Designated Insured information, then **Save and Close** or **Save and Add Another**.

## STEP 6 PREMIUM SUMMARY

Step 1 Step 2 Step 3 Step 4 Step 5 Step 6 Checkout Save Work

Print Worksheet

Coverage Level Premium Totals	
Coverage	Amount
Liability (BI)	988
PIP (No Deductible)	262
Medical	15
Uninsured Motorist	35
PD Comprehensive	201
PD Collision	332
<b>Total</b>	<b>1,833</b>

New Installment Plan			
Description	Due Date	Amount	Status
Downpayment	05-10-2017	421.00	Billed
Installment # 1	06-26-2017	166.85	Pending
Installment # 2	07-26-2017	166.85	Pending
Installment # 3	08-26-2017	166.85	Pending
Installment # 4	09-26-2017	166.85	Pending
Installment # 5	10-26-2017	166.85	Pending
Installment # 6	11-26-2017	166.85	Pending
Installment # 7	12-26-2017	166.85	Pending
Installment # 8	01-26-2018	166.85	Pending
Installment # 9	02-26-2018	166.82	Pending

Annualized Endorsement Premium: (\$2,127.00)

Pro-rated Difference: (\$2,127.00)

Down Payment Amount:

Rate Factor: 1,000

Fields with \* are required.

Previous Next

The **Premium Summary** will detail the Coverage Level Premium Totals.

- Click the **Print Worksheet** button to view/print the worksheet detailing the endorsement changes, including the new installment plan.
- The difference in the premium will be applied to the remaining monthly installments, if any. If the endorsement produces an additional premium and there are no remaining monthly installments, the gross additional premium must be paid in full.

## CHECKOUT - PAYMENT INFORMATION

- Pay additional premium, if applicable, by check or credit card.
- Select payer; enter Insured billing information, if applicable.
- Click the Endorsement Issue button to issue the endorsement.
- Print or download the endorsement package, including ID Cards.

## COMMERCIAL AUTO ENDORSEMENTS

The matrix below lists some of the changes eligible for online endorsement processing. The information in this guide lists some of the endorsements that you can process within Ascendant's Agent Portal. Please be advised that you cannot process out-of-sequence endorsements.

ENDORSEMENT	FUNCTION
FEIN, Insured Name and/or DBA	Delete / Edit
Insured's Mailing & Physical Address	Edit
Liability Limits	Edit
Uninsured Motorists Coverage	Add / Delete / Edit
Medical Payments	Add / Delete / Edit
Additional Coverages	Add / Delete / Edit
Vehicles - When deleting vehicles, one vehicle must be left on the policy	Add / Delete / Edit
Comprehensive and Collision Coverage	Add / Delete / Edit
Additional Insureds & Loss Payees	Add / Delete / Edit
Driver	Add / Delete / Edit
Designated Insured	Add / Delete / Edit