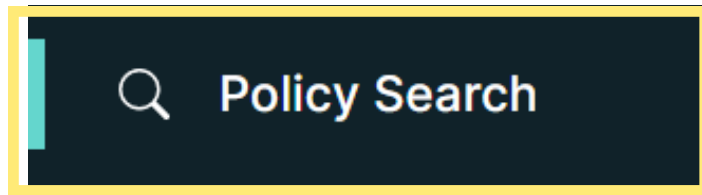


*Note: This process will allow you to see impact of an endorsement with or without payment.*



After signing into the agent portal, find the Policy Search Button in the left banner of the page.

Once selected, the page will update with the Search Policy and Search Result sections.

The screenshot shows the 'Search Policy' page in the UniFi Management system. At the top, there's a header with the UniFi logo, phone number (456) 465-45644, a '+ Create Quote' button, a language dropdown set to 'English', and a user profile icon. The main content area has a 'Search Policy' section with input fields for 'Policy No.', 'Last Name', 'First Name', and a 'Select Product' dropdown menu. A 'Search Policy' button is centered below these fields. Below the search section is a 'Search Result' table with columns: Submit Date, Policy Type, Policy NO, Policyholder/Member Name, Status, Remark, Agent, Agency, and Action. The table contains three rows of canceled policies.

Submit Date	Policy Type	Policy NO	Policyholder/Member Name	Status	Remark	Agent	Agency	Action
2022-11-28 05:51:00	Flood Program	<a href="#">FLD3139002081</a>	CANCEL RE-WRITE 5	Canceled	N/A	CATHERINE POLLARD	UNIFI MANAGEMENT	Select Actic ▾
2022-11-28 05:45:27	Flood Program	<a href="#">FLD3139002061</a>	CANCEL RE-WRITE 4	Canceled	N/A	CATHERINE POLLARD	UNIFI MANAGEMENT	Select Actic ▾
2022-11-28 05:40:39	Flood Program	<a href="#">FLD3139002049</a>	CANCEL RE-WRITE 3	Canceled	N/A	CATHERINE POLLARD	UNIFI MANAGEMENT	Select Actic ▾

Within the Search Policy section, enter the Policy No., Last Name, First Name or Product type to search for a policy.

The screenshot shows the 'Search Policy' form with four input fields: 'Policy No.', 'Last Name', 'First Name' (containing 'TEST'), and 'Select Product' (a dropdown menu). A teal 'Search Policy' button is centered below the fields. A yellow box highlights the same button in a larger, zoomed-in view below the main form.

After selecting the Search Policy button, the Search Result section will display the policies related to the search parameters.

The screenshot shows the 'Search Policy' form at the top, identical to the previous one. Below it is a 'Search Result' section with a teal header and a table containing two rows of search results.

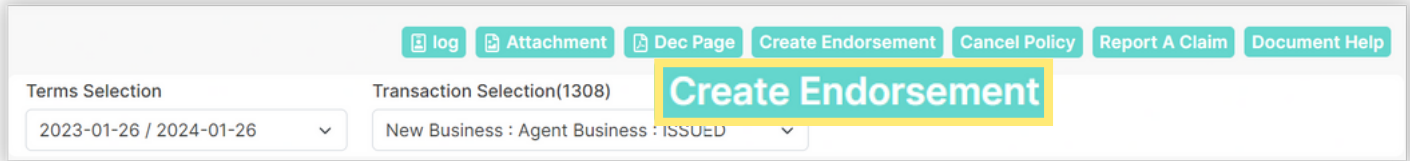
Submit Date	Policy Type	Policy NO	Policyholder/Member Name	Status	Remark	Agent	Agency	Action
2022-12-27 16:17:54	Flood Program	<a href="#">FLD3139002641</a>	TEST QUOTE	Issued	N/A	TEST AGENT	UNIFI MANAGEMENT	Select Action
2022-12-27 16:17:37	Flood Program	<a href="#">FLD3139002635</a>	TEST QUOTE	Active	Pending	TEST AGENT	UNIFI MANAGEMENT	Select Action

To open the policy, select the hyperlinked blue Policy No.

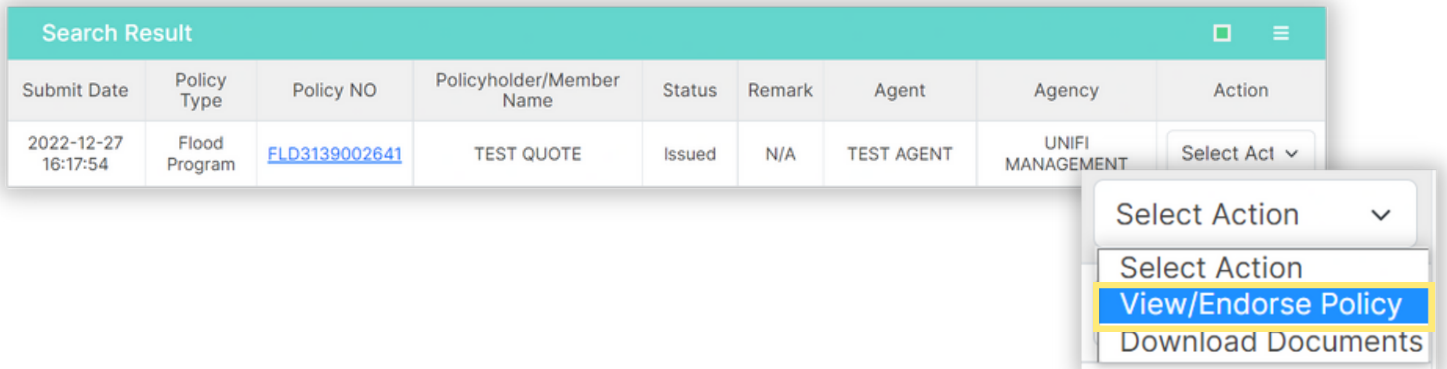
The screenshot shows the 'Search Result' table from the previous image. The 'Policy NO' 'FLD3139002635' in the second row is highlighted with a yellow box.

Submit Date	Policy Type	Policy NO	Policyholder/Member Name	Status	Remark	Agent	Agency	Action
2022-12-27 16:17:54	Flood Program	<a href="#">FLD3139002641</a>	TEST QUOTE	Issued	N/A	TEST AGENT	UNIFI MANAGEMENT	Select Action
2022-12-27 16:17:37	Flood Program	<a href="#">FLD3139002635</a>	TEST QUOTE	Active	Pending	TEST AGENT	UNIFI MANAGEMENT	Select Action

Select the Create Endorsement from within the policy

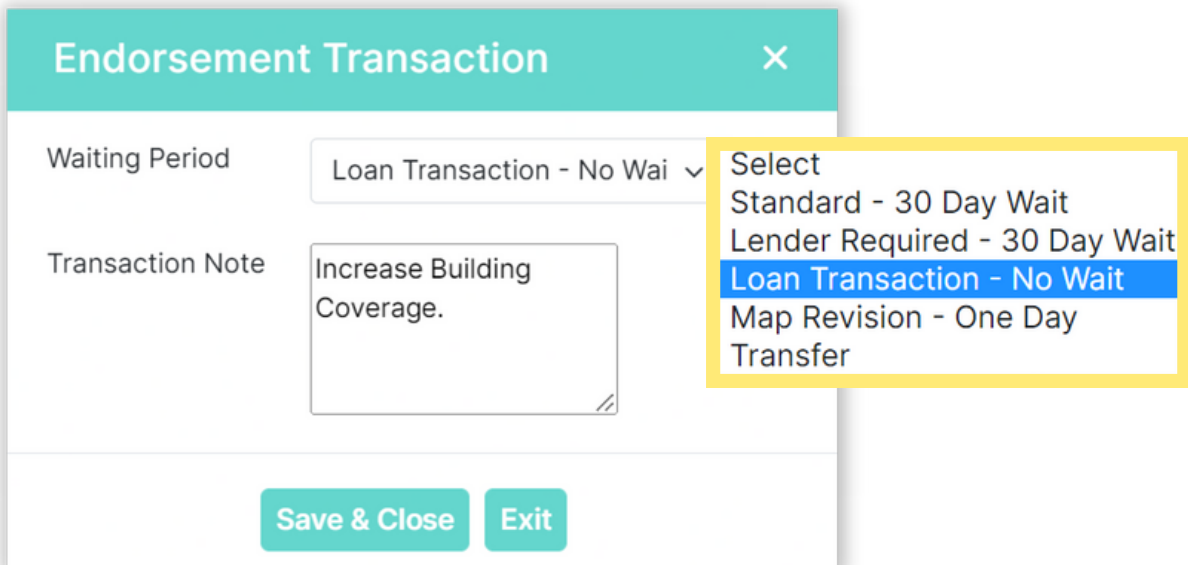


Alternatively, to directly open the endorsement transaction window of the policy, select View/Endorse Policy from the Select Action dropdown menu of the Search Policy page



After selecting the Create Endorsement button within the policy OR the View/Endorse Policy option from the Search Policy page, you will see the Endorsement Transaction window.

Select the effective date rule that applies to the endorsement change from the Waiting Period drop-down menu and enter a brief Transaction Note describing the type of change to be made and press the Save and Close button.



*Note: System does not support out of sequence endorsements.  
This would require a cancel-rewrite.*

Expand the Coverage banner to proceed to the coverage and/or deductible fields to make desired changes and then press the Review button.

Terms Selection: 2023-01-26 / 2024-01-26  
Transaction Selection(1310): Endorsement : Change: Rating Info : QUOTE

Expand All

Coverage	Current	New	Deductible	Current	New
Building	\$142000	<input type="text" value="\$150,000"/> Max : \$250000	Building	\$2000 Deductible	Select
Content	\$20000	<input type="text" value="\$0"/> Max : \$100000	Content	\$2000 Deductible	Select

*If you would like to decrease coverage, please enter your request in the Other Endorsements section*

Insured Information	+
Lender	+
Additional Information	+
Request Underwriter Review	+

Cancel Transaction   Review

**Note:** The user can click on additional banners to make other changes as needed and should select Review button once ALL changes have been entered on endorsement request.

Review the Endorsement summary to ensure that the information as well as the effective date is correct.

Terms Selection: 2023-01-26 / 2024-01-26

Transaction Selection(1313): Endorsement : Change: Rating Info : QUOTE

⚠ Don't Refresh this page

Close All

**Applicant**

**Name :** TEST QUOTE      **Policy Number :** FLD3139002635  
**Address :** 2616 Marconi St, Tampa, FL, 33605      **Term :** 01-26-2023 / 01-26-2024

**Endorsement Details**

Waiting Period	Effective Date	Quoted Premium	Total Premium Change
Standard - 30 Day Wait	01/26/2023	\$1,750	\$16

**Summary of Changes**

	Current	New
Building Coverage	\$142000	\$150000

Cancel Transaction   Pay & Submit

If the coverage/deductible or rating change requires any supporting documentation, (i.e reducing coverage requires proof of over-insurance, insured signature) a message will be displayed and an option to upload will be provided. Upload any required supporting documentation.

*Note: If Cancel Transaction is selected, the endorsement will be removed.  
If Pay & Submit is selected, the endorsement can be saved or paid.*

If additional premium is required, the *Pay & Submit* button will be displayed. Click on the *Pay & Submit* button to be directed to pay.gov and to enter the appropriate payment fields.

The image shows a 'Summary of Changes' screen with a table comparing current and new values for 'Building Coverage'. A 'Pay & Submit' button is highlighted with a yellow box. An arrow points from this button to a payment form titled 'FEMAFLOODNFSIE'. The form includes fields for Agency Tracking ID, Payment Amount, Cardholder Name, Billing Address, City, Country, State/Province, ZIP/Postal Code, Card Number, Expiration Date, and Security Code. There are 'Continue' and 'Cancel' buttons at the bottom of the form.

	Current	New
Building Coverage	\$150000	\$250000

Upon successful payment at pay.gov, you will be returned to the Policy Summary Screen. with the Success pop-up message. Simply, click the OK button to close the pop-up.

A success pop-up message is displayed. It features a green checkmark icon inside a circle at the top. Below the icon, the word 'Success' is written in a large, bold font. Underneath, the text 'Policy endorsement was successful.' is shown in a smaller font. At the bottom of the pop-up is a blue button with the text 'OK' in white.

You will be returned to the Policy Summary Screen. Review the status of the submitted endorsement by reviewing the following fields:

**Transaction Selection** - the status of the Endorsement will be displayed. *In this case it shows: "Change Rating Info: Issued."* If the endorsement requires a document review it will display "Change Rating Info: Pending". If endorsement is pending, the agent can click on Log icon to see a complete list of correspondence with agency and log notes regarding why endorsement is pending and what is needed to resolve endorsement.

**Transaction Note** - The Transaction Note entered during the Endorsement process will be displayed.

**Specific Endorsed** - Proceed to field that was endorsed to ensure the field now reflects the updated information. In this case we can see the coverage currently shows the increased amount of \$150,000

**Dec Page** - If the endorsement has issued, a declarations page will be displayed reflecting the endorsement change.

log Attachment **Dec Page** Create Endorsement Cancel Policy Report A Claim Document Help


Terms Selection: 2023-01-26 / 2024-01-26

Transaction Selection(1171): Endorsement : Change: Rating Info : ISSUED

Application	Coverage	Property Info	Additional Info	Forms	Billings
FLD3139002635					
Policy #/Holder Name	FLD3139002635/1/TEST QUOTE		Payment Plan	Full Pay	
Terms Start date	01/26/2023		Term End Date	01/26/2024	
Transaction Effective date	01/26/2023		Transaction Exp. Dt.	01/26/2024	
Transaction Type	Endorsement - Change: Rating Info		Bill to	POLHOLDER	
Total Premium Change	\$16.00		Product Name	Flood Program	
Total Premium	\$1,750.00		U/writer	TABITHA GUINN	
Total Claim	0 Policyholder/Member Copy Agent Copy		Transaction Note	Increase Building Coverage.	
Serv Rep	CATHERINE POLLARD				

Replacement Cost: \$141,750    Building Deductible: \$2000 Deductible    Content Deductible: \$2000 Deductible

Basic Coverage ↑↓	Limit	Premium ↑↓
Building Coverage Amount	\$150,000.00	\$1,259.00
Content Coverage Amount	\$20,000.00	\$535.00



PROPERTY ADDRESS #:	2616 MARCONI ST, Tampa, FL, 33605	ENDORSEMENT EFFECTIVE DATE:	12-28-2022
POLICY #:	FLD3139002635	REASON FOR CHANGE:	Coverage/Deductible
NFIP POLICY #:	3139002635	POLICY FORM:	Dwelling form
POLICY TERM:	01-26-2023 - 01-26-2024 (12:01 a.m.)	POLICY DECLARATIONS TYPE:	Revised Policy Declarations
POLICY ISSUED BY:		RATE CATEGORY :	RatingEngine
PAYOR:	TEST QUOTE		

Agents can verify receipt of payment by clicking on the *Billings* tab at top of page.

Application	Coverage	Property Info	Additional Info	Forms	Billings
FLD3139002635					
Policy #/Holder Name	FLD3139002635/1/TEST QUOTE		Payment Plan	Full Pay'	
Terms Start date	01/26/2023		Term End Date	01/26/2024	
Transaction Effective date	01/26/2023		Transaction Exp. Dt.	01/26/2024	
Transaction Type	Endorsement - Change: Rating Info		Bill to	POLHOLDER	
Total Premium Change	\$16.00		Product Name	Flood Program	
Total Premium	\$1,750.00		U/writer	TABITHA GUINN	
Total Claim	0 Policyholder/Member Copy Agent Copy		Transaction Note		
Serv Rep	CATHERINE POLLARD				

In the example below we can see that there is an invoice for \$16 but no entry showing that payment has been received. Once payment is received, payment will be displayed under the *Trans Type* column and *Balance* column would reflect \$1,750.

Policy Transaction										Account View	Receivable View	Invoicing
ACCOUNTING DT	TRANS TYPE	TRANS REF	USER ID	ORIG TRANS	UNALLOCATED	DEBIT	CREDIT	BALANCE	SYSTEM DT			
2022-12-27	PAYMENT		UNIFL_ADMIN	PAYMENT	\$0.00	\$0.00	\$0.00	\$(1,733.00)	2022-12-27 16:17:46			
2022-12-27	INVOICE	INV00000404	TEST AGENT	INVOICE	\$1,733.00	\$1,733.00	\$0.00	\$0.00	2022-12-27 16:18:58			
2022-12-28	INVOICE	INV00000404	TEST AGENT	INVOICE	\$16.00	\$0.00	\$16.00	\$16.00	2022-12-28 12:18:46			

### Money Endorsement Results in Refund:

For Money Endorsements that result in a refund such as a decrease in coverage, increase in deductible or change to Primary Residence status, the Policy Summary Screen will reflect a refund amount in red in the *Total Premium Change* field. In addition, the refund amount due will be displayed in the Policy Transaction banner.

Application	Coverage	Property Info	Additional Info	Forms	Billings
FLD3139002635					
Policy #/Holder Name	FLD3139002635/1/TEST QUOTE		Payment Plan	Full Pay'	
Terms Start date	01/26/2023		Term End Date	01/26/2024	
Transaction Effective date	01/26/2023		Transaction Exp. Dt.	01/26/2024	
Transaction Type	Endorsement - Change: Rating Info		Bill to	POLHOLDER	
Total Premium Change	\$(16.00)		Product Name	Flood Program	
Total Premium	\$1,718.00		U/writer	TABITHA GUINN	
Total Claim	0 Policyholder/Member Copy Agent Copy		Transaction Note		
Serv Rep	CATHERINE POLLARD				

Policy Transaction										Account View	Receivable View	Invoicing
ACCOUNTING DT	TRANS TYPE	TRANS REF	USER ID	ORIG TRANS	UNALLOCATED	DEBIT	CREDIT	BALANCE	SYSTEM DT			
2022-12-27	PAYMENT		UNIFL_ADMIN	PAYMENT	\$0.00	\$0.00	\$0.00	\$(1,733.00)	2022-12-27 16:17:46			
2022-12-27	INVOICE	INV00000404	TEST AGENT	INVOICE	\$1,733.00	\$1,733.00	\$0.00	\$0.00	2022-12-27 16:18:58			
2022-12-28	INVOICE	INV00000404	TEST AGENT	INVOICE	\$0.00	\$0.00	\$0.00	\$(16.00)	2022-12-28 12:18:46			