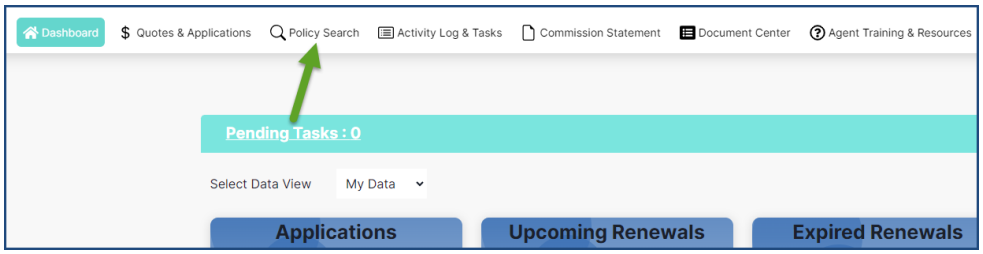
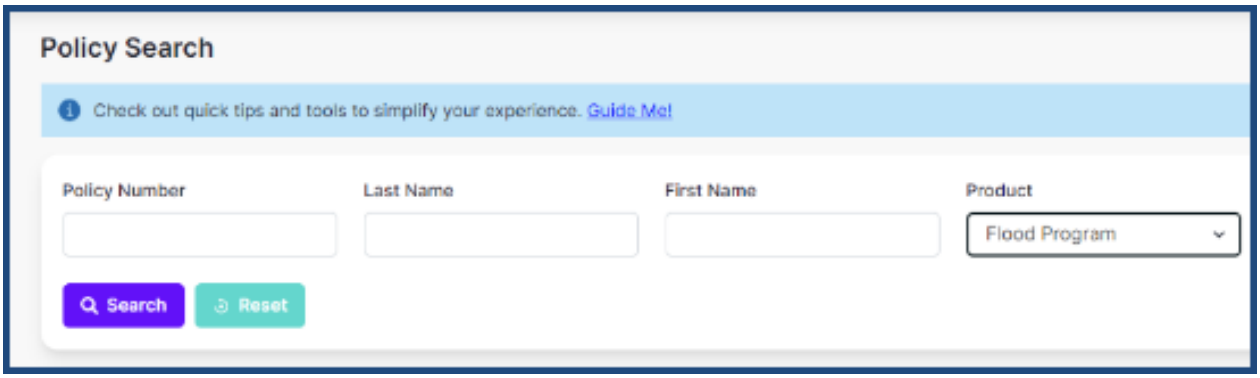
# Endorsing a Policy

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

After signing into the agent portal, find the “Policy Search” button at the top of the page.

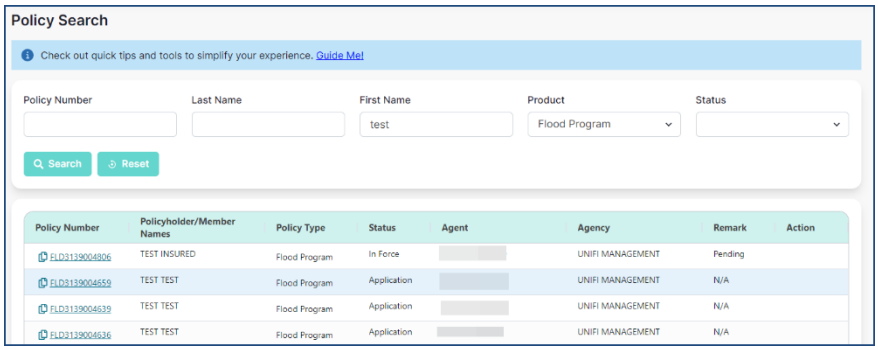



Within the “Search Policy” section, enter the Policy Number, Last Name, First Name or Product type and then click “Search”.

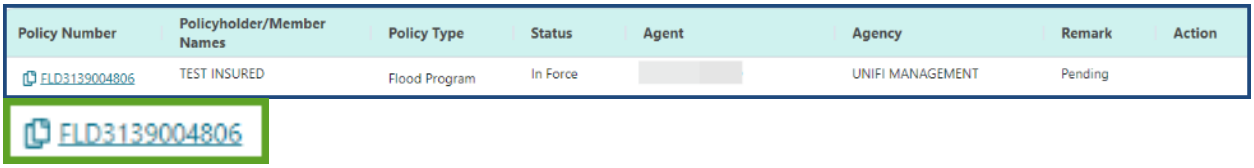



©2024 Taurus LLC– Proprietary & Confidential

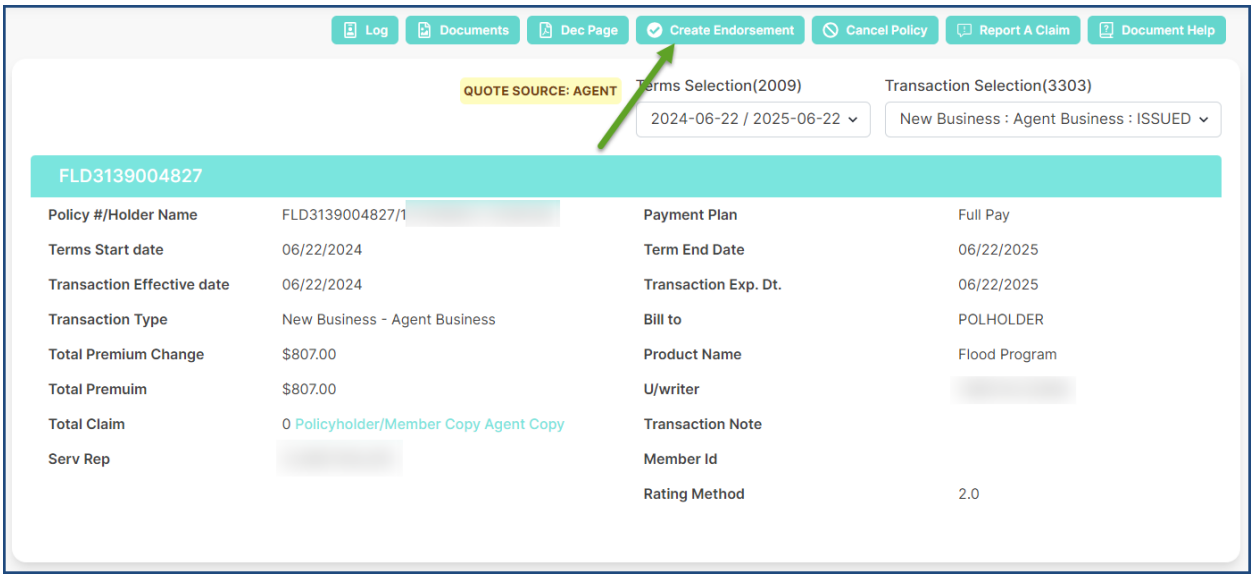
After selecting the “Search” button, the search results will display the policies related to the search parameters.




To open the policy, select the blue “Policy Number” hyperlink.



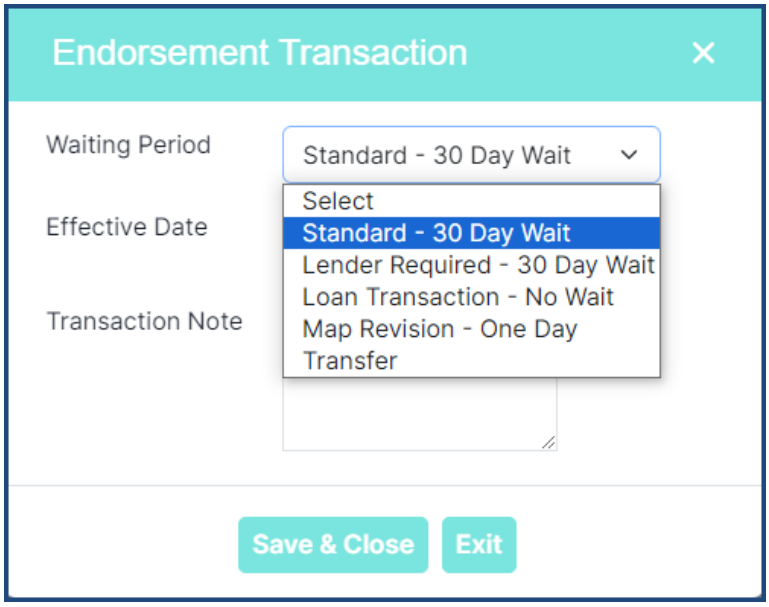

Select the “Create Endorsement” button.



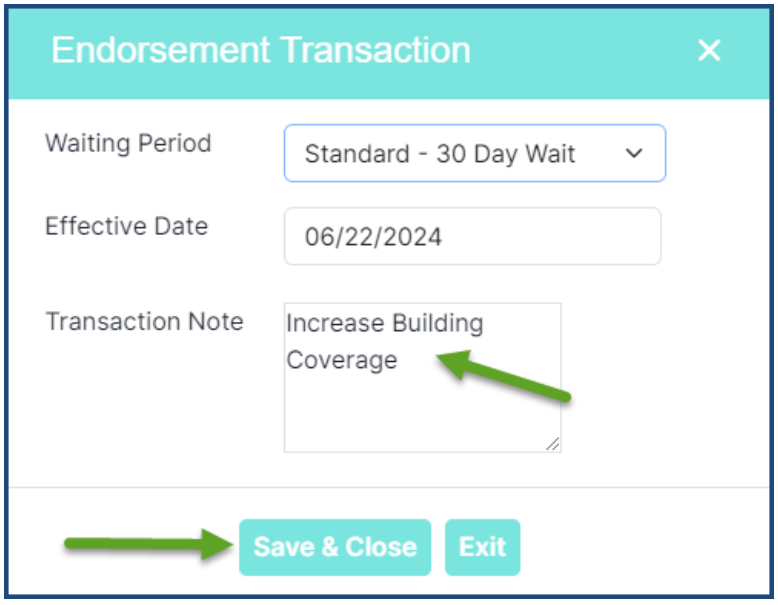

Now you’ll see the Endorsement Transaction window.

©2024 Taurus LLC– Proprietary & Confidential

Select the effective date rule that applies to the endorsement from the “Waiting Period” drop-down menu.



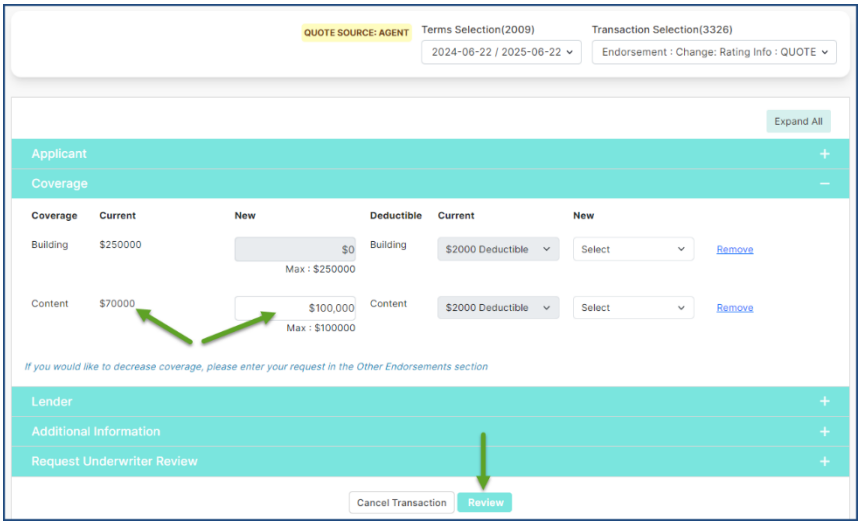

Enter a brief Transaction Note describing the type of change to be made, then press the “Save and Close” button.




*Note: System doesn’t support out of sequence endorsements. This would require a cancel-rewrite.*

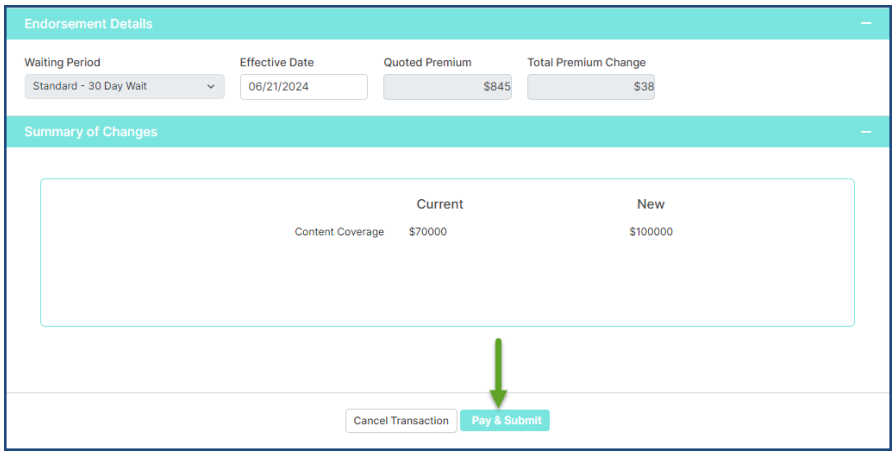
Expand the Coverage Banner to proceed to the coverage and/or deductible fields to make desired changes and then press the “Review” button.

©2024 Taurus LLC– Proprietary & Confidential




*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 the endorsement request.*

Review the Endorsement Details and Summary of Changes to ensure that the information, as well as the effective date, is correct and click "Pay & Submit".

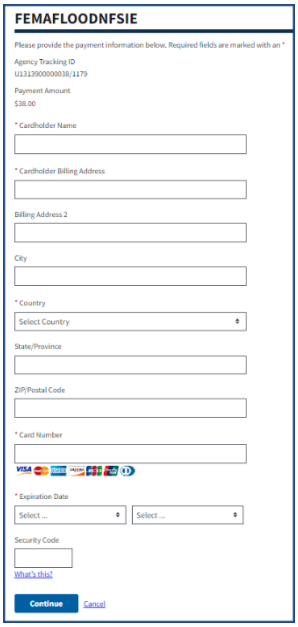



If the coverage/deductible or rating change requires any supporting documentation, (i.e reducing coverage requires proof of over-insurance, insured signature) a message will be displayed and an option to upload will be provided. Upload any required supporting documentation.

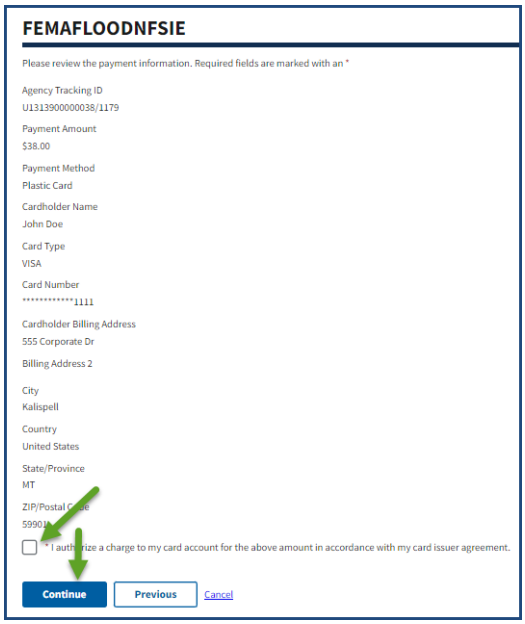
*Note: If "Cancel Transaction" is selected, the endorsement will be removed.*

If additional premium is required, clicking the "Pay & Submit" button will cause the pay.gov window to populate. Input the required information to submit payment and click "Continue".

**©2024 Taurus LLC– Proprietary & Confidential**

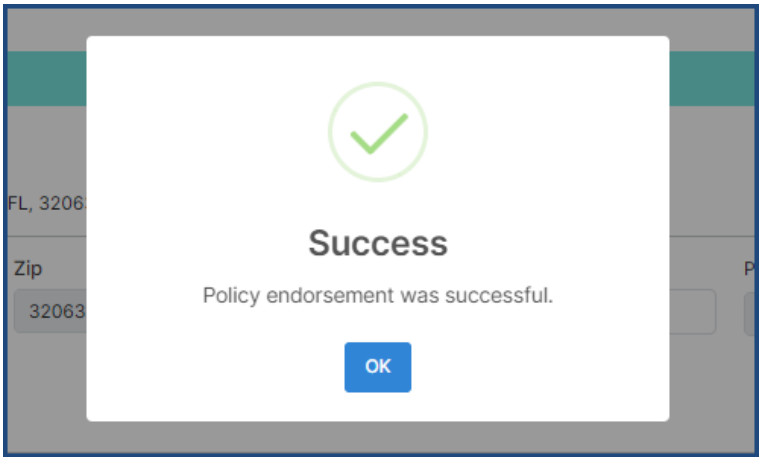



Then check the box to authorize the change and click “Continue”.

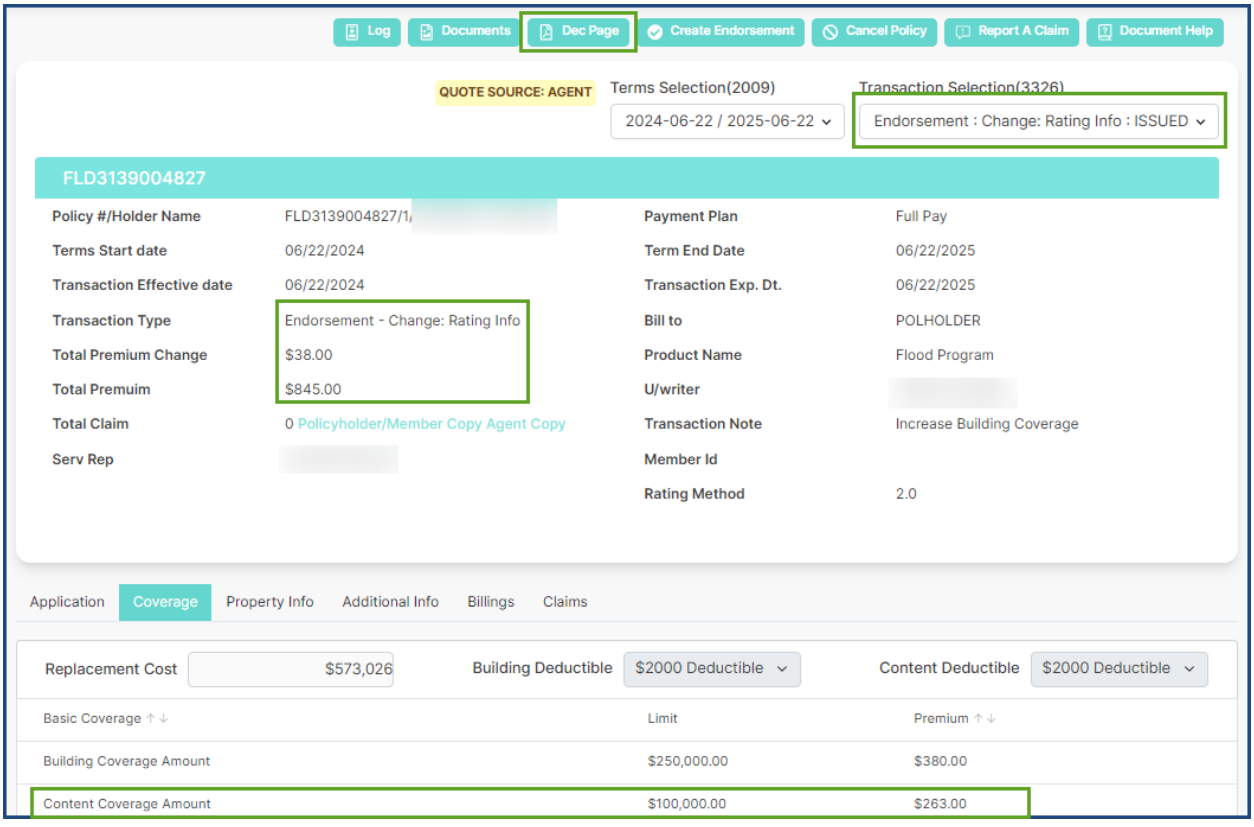



If the payment was successful, you will get this message.

©2024 Taurus LLC– Proprietary & Confidential

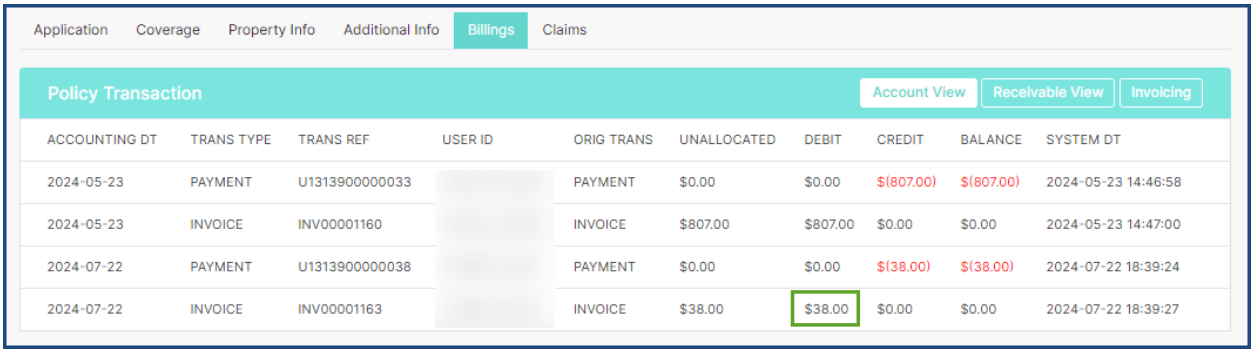



You will be returned to the Policy Summary Screen. Review the following fields to verify your changes were made. You can also click the “Dec Page” button at the top of the screen to generate a PDF of the Declarations Page.




©2024 Taurus LLC– Proprietary & Confidential

If you click on the “Billings” tab, you will see where the endorsement premium was applied as a Debit. If the endorsement had resulted in a refund, the amount would have shown under “Credit”.




| ACCOUNTING DT | TRANS TYPE | TRANS REF | USER ID | ORIG TRANS | UNALLOCATED | DEBIT | CREDIT | BALANCE | SYSTEM DT |
|---|---|---|---|---|---|---|---|---|---|
| 2024-05-23 | PAYMENT | U1313900000033 | | PAYMENT | $0.00 | $0.00 | $(807.00) | $(807.00) | 2024-05-23 14:46:58 |
| 2024-05-23 | INVOICE | INV00001160 | | INVOICE | $807.00 | $807.00 | $0.00 | $0.00 | 2024-05-23 14:47:00 |
| 2024-07-22 | PAYMENT | U1313900000038 | | PAYMENT | $0.00 | $0.00 | $(38.00) | $(38.00) | 2024-07-22 18:39:24 |
| 2024-07-22 | INVOICE | INV00001163 | | INVOICE | $38.00 | $38.00 | $0.00 | $0.00 | 2024-07-22 18:39:27 |

©2024 Taurus LLC– Proprietary & Confidential