

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 portal. The page includes a search form with fields for Policy No., Last Name, First Name, and a dropdown for Select Product. Below the form is a 'Search Policy' button. The search results are displayed in a table with columns for Submit Date, Policy Type, Policy NO, Policyholder/Member Name, Status, Remark, Agent, Agency, and Action.

Submit Date	Policy Type	Policy NO	Policyholder/Member Name	Status	Remark	Agent	Agency	Action
2022-11-28 05:51:00	Flood Program	FLD3139002081	CANCEL RE-WRITE 5	Canceled	N/A	CATHERINE POLLARD	UNIFI MANAGEMENT	Select Actic ▾
2022-11-28 05:45:27	Flood Program	FLD3139002061	CANCEL RE-WRITE 4	Canceled	N/A	CATHERINE POLLARD	UNIFI MANAGEMENT	Select Actic ▾
2022-11-28 05:40:39	Flood Program	FLD3139002049	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 a 'Search Policy' form with four input fields: 'Policy No.', 'Last Name', 'First Name' (containing 'TEST'), and 'Select Product' (a dropdown menu). Below the fields is a teal 'Search Policy' button with a magnifying glass icon. A yellow box highlights this button.

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 with the search button. Below it is a 'Search Result' section with a teal header and a table of results.

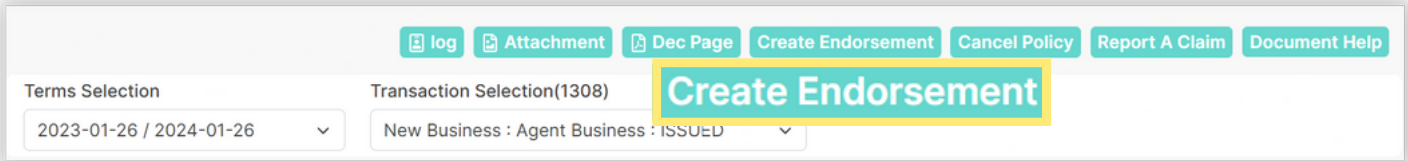
Submit Date	Policy Type	Policy NO	Policyholder/Member Name	Status	Remark	Agent	Agency	Action
2022-12-27 16:17:54	Flood Program	FLD3139002641	TEST QUOTE	Issued	N/A	TEST AGENT	UNIFI MANAGEMENT	Select Act ▾

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

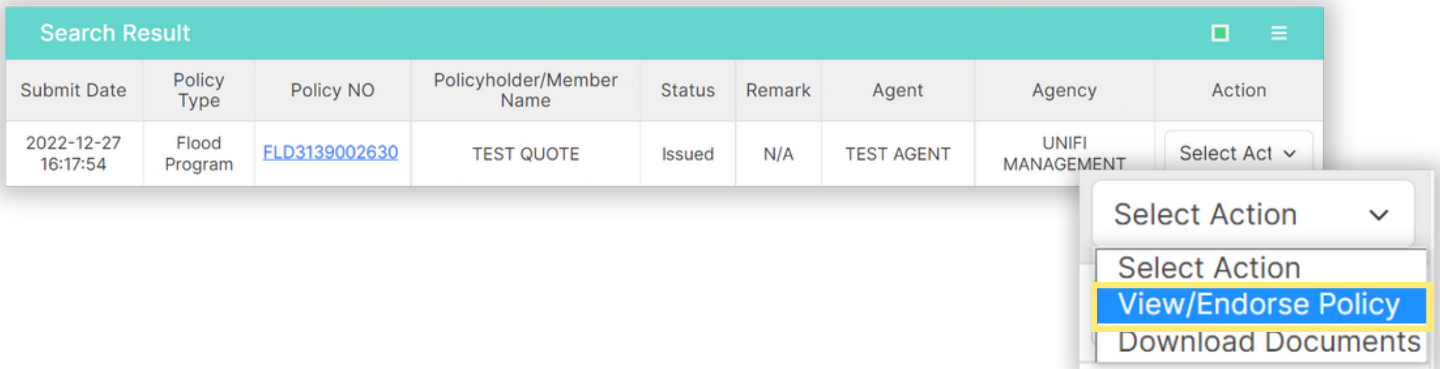
This is a close-up of the 'Search Result' table from the previous screenshot. The 'Policy NO' cell, containing the blue hyperlinked text 'FLD3139002641', is highlighted with a yellow box.

Submit Date	Policy Type	Policy NO	Policyholder/Member Name	Status	Remark	Agent	Agency	Action
2022-12-27 16:17:54	Flood Program	FLD3139002641	TEST QUOTE	Issued	N/A	TEST AGENT	UNIFI MANAGEMENT	Select Act ▾

Select the Create Endorsement from within the policy

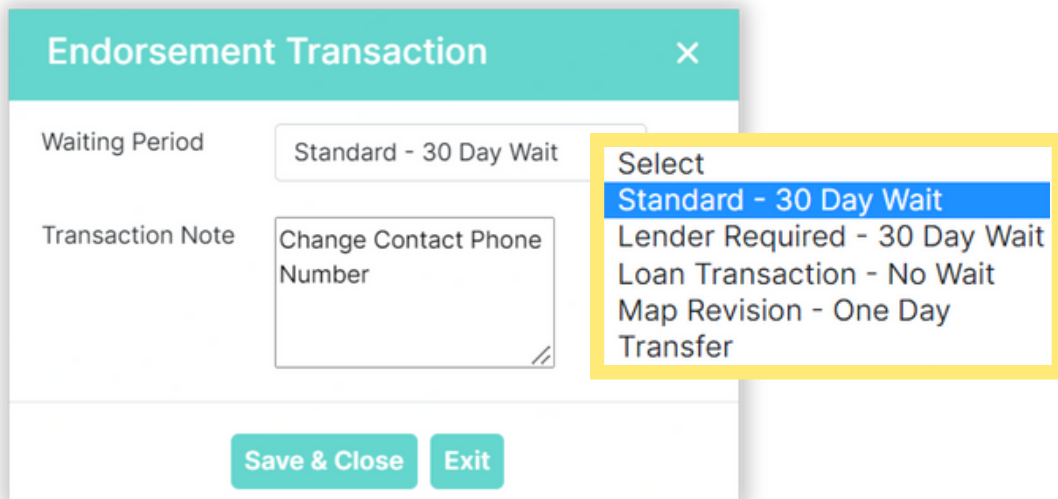


Alternatively, to directly open the endorsement transaction window of the policy, select View/Endorse Policy from the Select Action dropdown menu of the Search Policy page



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 appropriate section banner to proceed to the fields needed to make the change. (For example, to make a contact number change, click on the Insured Information Banner where the Phone Number information is displayed. Make all of the desired changes and then press the Review button.

The screenshot shows a form with several expandable sections. The 'Insured Information' section is expanded, showing a 'Mailing Address' section. Within this section, the 'Phone Number' field is highlighted with a yellow box. Below the form are two buttons: 'Cancel Transaction' and 'Review'.

Review the Endorsement summary to ensure that the information as well as the effective date is correct and then press Submit.

The screenshot shows the 'Endorsement Details' section of the form. It includes fields for 'Waiting Period', 'Effective Date', 'Quoted Premium', and 'Total Premium Change'. Below these is a 'Summary of Changes' section, which contains a table comparing 'Current' and 'New' information. The table is highlighted with a yellow border. Below the form are two buttons: 'Cancel Transaction' and 'Submit'.

	Current	New
Phone	(111)111-1111	(813)333-3333

Note: If the update requires any supporting documentation, a message will be displayed and an option to upload will be provided. Upload any required supporting documentation before pressing the Submit button.

Name	Is Attached	Action
Proof Of Residency	N	

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 the field that was endorsed to ensure the field now reflects the updated information.

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

FLD3139002620

Policy #/Holder Name	FLD3139002620/1/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	\$1,733.00	Product Name	Flood Program
Total Premium	\$1,733.00	U/writer	TABITHA GUINN'
Total Claim	0 Policyholder/Member Copy Agent Copy	Transaction Note	Change Contact Phone Number
Serv Rep	CATHERINE POLLARD		

Agency Name	UNIFI MANAGEMENT	Agency Code	U0001
Producer Name	TEST AGENT	Agency Fax #	(111) 111-1111
Agency Address		DOB	2022-12-28 18:51:11
Agency Phone #	(111) 111-1111	Occupation	
Agency Email		Mailing Address	2616 Marconi St, Tampa, FL, 33605
Policyholder/Member Name	TEST QUOTE	Email	<input type="text" value="test@test.com"/> Update
Name(s) On Dec	TEST QUOTE		
Policy Address	2616 MARCONI ST, Tampa, FL, 33605		
Prior Address			
Policyholder/Member Phone #	(813)333-3333		



UniFi
GROUP

PROPERTY ADDRESS #: 2616 MARCONI ST, Tampa, FL, 33605 POLICY #: FLD3139002620 NFIP POLICY #: 3139002620 POLICY TERM: 01-26-2023 - 01-26-2024 (12:01 a.m.) POLICY ISSUED BY: PAYOR: TEST QUOTE	ENDORSEMENT EFFECTIVE DATE: 12-28-2022 REASON FOR CHANGE: Phone Number POLICY FORM: Dwelling form POLICY DECLARATIONS TYPE: Revised Policy Declarations RATE CATEGORY : RatingEngine
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