

How to Endorse a Policy in InsureScan's Policy Admin System

Beginning the Endorsement

Policy Search

Search Criteria: Policy # / Name Ins. Address Phone

Search For:

Policy Type:

Line Options: Driver Name / Lic Num Vehicle VIN
 Recent Policies Only

Total Policies (3)

Policy #	Status	Insured	Address	
AL-GIS-0000100118-00	08/08/22 - 02/08/23	Ins : BRENDA BONES	2151 BOSS AVE CLIO AL 36017	AWAITING ESIGNATURE
AL-GIS-0000100125-00	03/06/22 - 09/06/22	Ins : BARTY CROUCH	789 TEST DR WETUMPKA AL 36093	
AL-GIS-0000100131-00	08/17/22 - 02/17/23	Ins : GINA QUOTE	45 TEST WAY ALEX CITY AL 35010	

To begin an endorsement, log on to the PAS and click Policy at the top of the screen. Enter the first two letters of the policy holder's first name and their last name, or the last four digits of the quote/policy number, in the search bar and click Search. Click on the correct policy number.

Policy Info

BRENDA BONES
2151 BOSS AVE CLIO, AL 36017 | (496) 456-1516

AL-GIS-0000100118-00
08/08/2022 - 02/08/2023

Summary

Personal Auto Policy

Policy: AL-GIS-0000100118-00
Status: **Bound**
Effective: 08/08/2022
Expiration: 02/08/2023

Policy Term: 6 Month
Rated State: AL
Tenure: 0 Years
Claims Free: 0 Years

Last Endorsement: 08/17/2022 - Coverage Added
Claims: No claims exist for this policy.

Financial Summary

Total Prem / Fees / Third Party: \$721.00 + \$25.00 + \$0.00
Amount Due: \$149.20
Future/Renewal Term(s): \$0.00

Payment Plan: Direct Bill 20% Down 5 Pay
Installments: 5 Remaining

Last Pmt Rcvd: N/A - N/A
Method: Insured Bill
Acct: Setup Recurring

The next screen is a break down of the policy's info. To begin the endorsement, click the E-Quote button at the top of the screen.

Endorsement Quote

E-Quote **AL-GIS-0000100118-00 - Bound**
BRENDA BONES - GATEWAY INSURANCE COMPANY - Personal Auto

Policy
Insured
Location
Coverages
Drivers
Vehicles
App Questions

ADDRESS - GARAGING ADDRESS CHANGE
ADDRESS CHANGE
AUTO ADDED
AUTO DELETED
AUTO INFO CHANGE
AUTO SUBSTITUTE
AUTO SURCHARGE CHANGE
AUTO VIN# CHANGE
BUSINESS USE VEHICLE
COVERAGE - ADDITIONAL EQUIPMENT ADDED
COVERAGE - ADDITIONAL EQUIPMENT DELETED
 Reason not listed above.

Endorsement Date: 08/18/2022

Endorsement Description:

Policy Information

Policy Term: 6
Effective Date: 8/8/2022
Expiration Date: 2/8/2023

Please correct the missing or invalid information.
Endorsement Reason must be selected or Reason not Listed above checked and a description provided.

Continue

On first screen, you will choose the endorsement reason. If you cannot find the reason for the endorsement on the list highlighted in yellow, click the checkbox below and type the reason into the description box. Click Continue. You will then go through all the same screens as you do when you quote a policy. Change, add, or delete any of the information being endorsed, then click Acknowledge and Rate when you get to the App Questions screen (you will not be asked the app questions again).

Decline Endorsement Process Endorsement Return to Policy

INSURESCAN MGA, LLC Pending Endorsement Review Q00001253

Policy Coverages:

Bodily Injury	\$25,000 / \$50,000
Property Damage	\$25,000 per accident
Medical Payments	\$1,000

Change in Premium:

\$145.64

Above change in premium does not include:
Endorsement Fee: \$10.00

Details

Min. Required AP Down: \$39.13 *

Policy Payment Due: \$0.00
Total Due Now: \$39.13 *

Estimated change to your installments: \$23.30
Estimated new installment amount: \$143.66
* This does not include an Installment Fee of \$6.00

Total Premium: \$866.64
Endorsement Date: 08/18/2022
Change Reason: Auto Added

After you click Rate, you will get a breakdown of the new Premium. If the Insured agrees, click Process Endorsement. If the Insured is unhappy with the new rate, Decline the Endorsement. Return to Policy if the Insured would like to leave the quote and come back to it at a later time.

Finishing the Endorsement

Click a payment amount or enter a different amount below.

Payment Method: CC/BANK DRAFT

Payment Amount: \$ 32.13

Minimum	In Full	Other
\$29.13	\$145.64	\$

* Applicable fees being charged:
Electronic Payment Fee: \$3.00



Next »


If the Insured chooses to go ahead with the endorsement, they will need to make a payment. This process is the same as when you bind policies.

GINA QUOTE
45 TEST WAY ALEX CITY, AL 35010 | (546) 546-4546

AL-GIS-0000100131-00
08/17/2022 - 02/17/2023

Personal Auto Policy

Policy:	AL-GIS-0000100131-00	Policy Term:	6 Month	
Status:	Active	Rated State:	AL	
Effective:	08/17/2022	Tenure:	0 Years	
Expiration:	02/17/2023	Claims Free:	0 Years	

Last Endorsement: 08/18/2022 - Auto Added 

Claims



No claims exist for this policy.

After completing the payment, you will be returned to the Policy Info page. The endorsement will now show in the top section of the page, listing the date and reason for the endorsement.

GINA QUOTE
45 TEST WAY ALEX CITY, AL 35010 | (546) 546-4546

AL-GIS-0000100131-00
08/17/2022 - 02/17/2023

Personal Auto Policy

Policy:	AL-GIS-0000100131-00	Policy Term:	6 Month	
Status:	Active	Rated State:	AL	
Effective:	08/17/2022	Tenure:	0 Years	
Expiration:	02/17/2023	Claims Free:	0 Years	

Last Endorsement: Eff: 08/18/2022 [View Quote]

Claims



No claims exist for this policy.

If the Insured chooses to decide later, you will immediately be taken back to the policy info screen. The endorsement quote will show in the same spot as mentioned above. You may return to the quote and complete it by clicking View Quote.

BRENDA BONES
2151 BOSS AVE CLIO, AL 36017 | (496) 456-1516

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08/08/2022 - 02/08/2023

Personal Auto Policy

Policy:	AL-GIS-0000100118-00	Policy Term:	6 Month	
Status:	Bound	Rated State:	AL	
Effective:	08/08/2022	Tenure:	0 Years	
Expiration:	02/08/2023	Claims Free:	0 Years	

Last Endorsement: 08/17/2022 - Coverage Added

Claims

No claims exist for this policy.

If you click Decline Endorsement, you will be brought back to the policy info page as well. The new endorsement will not be shown, and the area aforementioned will either be blank, or show the latest endorsement made prior to the one you just quoted.