

## Endorsement Requests

Agents have the ability to make premium and non-premium endorsement requests on all active policies located on the BriteCore system. It is preferred that changes be made through the system rather than by sending an email or fax to your underwriter. Changes made to policies and submitted through the system will be reviewed by your underwriter before being committed.

### To quote policy changes in BriteQuote:

- Go to the "Policies" module and search for the active policy you wish to quote a change.
- Click the "Quote a Change" button (blue "Q" icon) to create a change.
- Type the effective date of the policy change in the "New Policy Change" box.
- Briefly describe the change you are going to make within the "Additional Description" box located near the top of the screen.
- Make the necessary endorsements/changes to the policy.
  - **Note: The two steps above must be completed for the endorsement to be submitted correctly**
- Verify changes, then click "Submit" tab. However, if you decide not to submit the change request, simply discard the request by clicking the red "Discard a Change" icon near the top of the screen.
- A new revision will be created on the policy in BriteCore once you submit the change request.
- New revisions must be reviewed and committed by an underwriter in order to take effect on a policy

We plan to review this procedure at the Fall Agents Meeting. After that review, it will be required that all endorsements be turned in through the BriteCore system in this manner.