

## SECTION 5: Make a Policy Change — Auto

### “Make a Policy Change.”

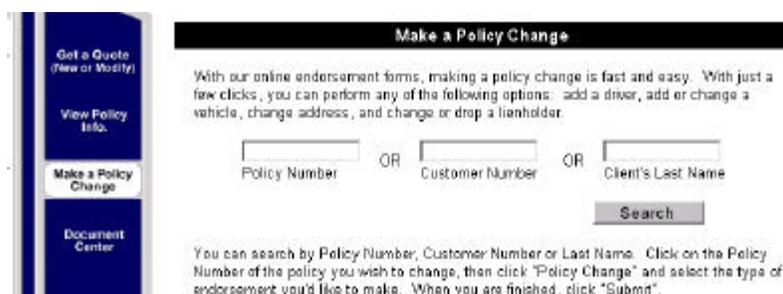
This function allows the producer to submit change requests for existing policies.



Enter the applicable state. This enables the producer to submit changes or look at previously submitted endorsement requests.



This screen allows the producer to search by policy number, customer number, or the client's last name.



## SECTION 5: Make a Policy Change — Auto... Continued

This screen allows the producer to choose the type of change. Here the producer is able to view the change or changes being requested.

- Add/Delete drivers
- Exclude drivers
- Add/Delete vehicles
- Increase/Decrease coverages
- Add/Delete loss payees or additional interests
- Insured's request to cancel
- Address Changes
- Add/Delete FR filing

The screenshot shows the Arrowhead Exchange website interface. At the top, there is a navigation bar with links for Menu, News & Updates, Help, Agency Setup, and Log Out. Below this, the main content area is divided into two tabs: "Policy Information" and "Policy Change". The "Policy Change" tab is active, and it contains a dropdown menu labeled "Please choose an endorsement category" with the option "Add Lienholder or Additional Insured" selected. Below the dropdown are two buttons: "<< Back" and "Next >>". On the left side of the page, there is a sidebar with a blue background containing the text "Get a Quote (New or Modify)" and "View Policy Info."

NOTE: Insured's signatures are still mandatory requirements for endorsements that involve decreasing coverages, deleting/excluding drivers or vehicles and cancellations. **However, the producer is responsible for obtaining the signatures and retaining them in their file.**

This is where the information for the requested change(s) is entered.

Policy Information	Policy Change
<b>To add a lienholder and/or additional interest to this policy, we need to obtain the following information.</b>	
What is the model year of the vehicle?	<input type="text" value="2003"/>
What is the make of the vehicle?	<input type="text" value="Chevrolet"/>
What is the model of the vehicle?	<input type="text" value="Tahoe"/>
What is the name of the lienholder or additional insured?	<input type="text" value="Julie Ramirez Credit Union"/>
How should this company be listed?	<input type="text" value="Lienholder"/>
What is their mailing address?	<input type="text" value="PO BOX 1234"/>
What is their City?	<input type="text" value="San Diego"/>
What is their State?	<input type="text" value="CA"/>
What is their Zip?	<input type="text" value="92121"/>

## **SECTION 5: Make a Policy Change — Auto... Continued**

This screen allows the producer to view the change(s) being requested. It also allows the producer to submit more than one request by selecting “Request another change to this policy.”

**Note:** The endorsement request must be submitted to complete the transaction by clicking on the “**Submit**” button at the bottom of the screen.

**Endorsement Entries for policy 60d0691552**

- Endorsements listed below have not yet been submitted to Arrowhead.
- Submit multiple endorsements for this policy by clicking the “Request another change to this policy” button.
- After all endorsements for this policy have been entered, submit them to Arrowhead by clicking the “Submit” button at the bottom of this screen.

**- Add Lienholder or Additional Insured -**

**Type:** Lienholder  
**Name:** Julie Ramirez Credit Union  
**Year:** 2003  
**Make:** Chevrolet  
**Model:** Tahoe  
**Address:** PO BOX 1234  
**City:** San Diego  
**State:** CA  
**ZipCode:** 92121

After submitting the endorsement request, this screen allows the producer to print a copy of the endorsement to keep in the client’s file.

## SECTION 5: Make a Policy Change — Auto... Continued

**Endorsement Complete**

You have successfully requested a change to policy 60D345123 for MELINDA JUAREZ.

Thank you for using Arrowhead's online endorsement service. Your confirmation number is 62099.

Please print out a copy of your endorsement request by clicking on the "Print" button located at the bottom of this screen. A copy of this request must be kept in the producer file.

Your request should be processed in a few days.

Click [here](#) to make another endorsement.

After clicking on the “**print**” button, this is the endorsement page that is printed. At the bottom of the page, the insured and producer are to sign and date the request(s). **The producer is responsible for retaining all endorsement requests with the required signatures.**

Policy Change Request Confirmation - 62929			
Policy/Customer #:	60D0691552	Change Effective Date:	05/16/2003 10:36 AM PST
Insured Name:	MELINDA JUAREZ	Current Policy Status:	UNKNOWN
Insured License No:		Source System:	UNKNOWN
<b>Producer Information:</b>			
Name:	ARROWHEAD GENERAL INSURANCE AGENCY	Transmit Date:	05/16/2003 10:36 AM PST
Code:	000000	Mailing Address:	402 W. BROADWAY, STE 1600 SAN DIEGO, CA 92101
Submitted by:	QATEST		
Phone:	(337)669-1889		
<b>Change 1 of 1 - Add Lienholder or Additional Insured</b>			
Type:	LIENHOLDER		
Name:	JULIE RAMIREZ CREDIT UNION		
Year:	2003		
Make:	CHEVROLET		
Model:	TAHOE		
Address:	TEST 1234		
City:	TEST		
State:	CA		
ZipCode:	92121		
<p>Please sign the appropriate line and hold onto this form for your records. Please have these forms completed and retained in your file.</p> <p>I agree to the aforementioned endorsements.</p> <p>Applicant's signature X _____ Date _____ Time _____ am/pm</p> <p>Producer's signature X _____ Date _____ Time _____ am/pm</p>			