

This presentation will assist you in the process of submitting Endorsements through the Finys system.



# Welcome



**SECURITY MUTUAL  
INSURANCE COMPANY**

*Established 1887*



**SECURITY COOPERATIVE  
INSURANCE COMPANY**

*Established 1910*

# Submitting Endorsements for Finys

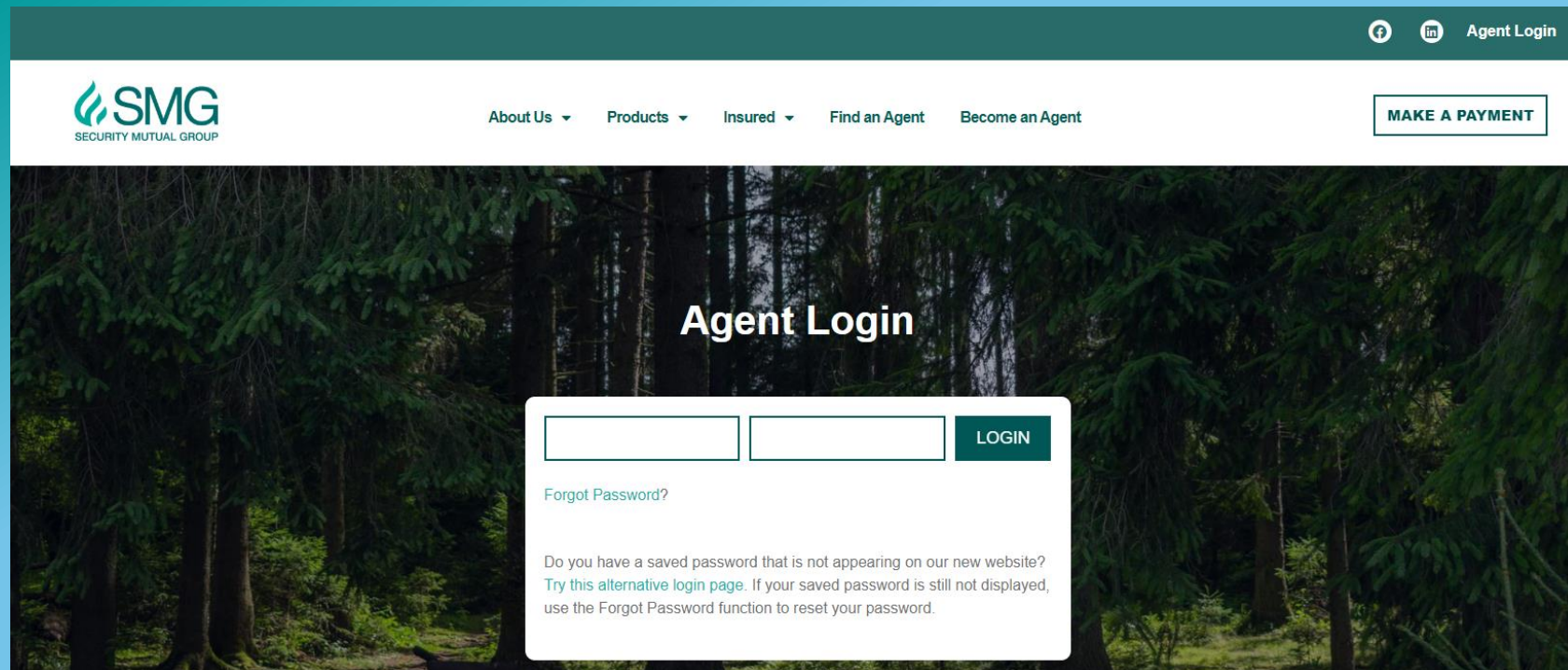
## Key Reminders

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- For your **Errors and Omissions** protection, we highly recommend that you retain a signed document of requested policy changes.
- Signed authorization is needed to remove a named insured. The person being removed must give authorization for their name to be removed.
- Please allow 5-7 business days for completion.
- Do not send duplicate requests.
- Call if an Endorsement has been submitted with an urgent status.
- ACH/Pay plan changes are **NOT** to be sent to Endorsements. They are to be sent to the Direct Bill department.
- Attach photos, documents, appraisals, or other pertinent information for a change.
- Notify Security Mutual when any change of occupancy occurs, ie: Death, Moving, Divorce, Primary or Secondary/Seasonal Change.
- Any coverage questions are to be directed to Underwriting Department.

# Let's Get Started!

## Sign in



The screenshot shows the SMG (Security Mutual Group) website's Agent Login page. The page features a dark teal header with the SMG logo on the left and navigation links for 'About Us', 'Products', 'Insured', 'Find an Agent', and 'Become an Agent' in the center. A 'MAKE A PAYMENT' button is located on the right. Below the header is a large image of a forest with the text 'Agent Login' centered. A white login form is overlaid on the image, containing two input fields and a 'LOGIN' button. Below the form is a link for 'Forgot Password?' and a paragraph of text providing instructions for users with saved passwords that are not appearing on the new website.

Agent Login

SMG  
SECURITY MUTUAL GROUP

About Us ▾ Products ▾ Insured ▾ Find an Agent Become an Agent

MAKE A PAYMENT

Agent Login

LOGIN

[Forgot Password?](#)

Do you have a saved password that is not appearing on our new website?  
[Try this alternative login page.](#) If your saved password is still not displayed,  
use the Forgot Password function to reset your password.





# Select Finys Suite

Navigation: [Agent Resources](#) [Logout](#)

SMG SECURITY MUTUAL GROUP

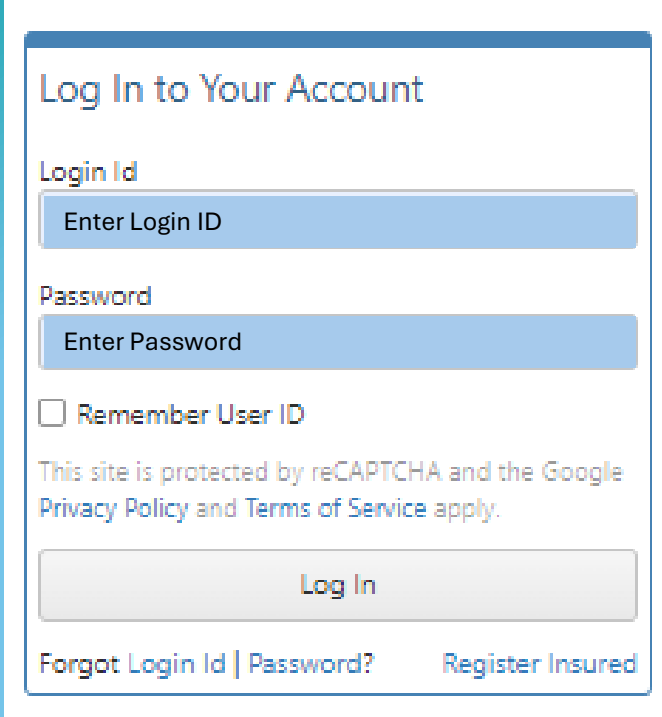
Navigation: [About Us](#) [Products](#) [Insured](#) [Find an Agent](#) [Become an Agent](#) [MAKE A PAYMENT](#)

## Agent Resources

-   
**Finys Suite**
-   
**AgentXpress**
-   
**Contact Us**
-   
**Request A Quote**

# Log Into Finys

Disclaimer! UAT screens may be different from screens agents see

A screenshot of a web login form titled "Log In to Your Account". The form contains two input fields: "Login Id" with a placeholder "Enter Login ID" and "Password" with a placeholder "Enter Password". Below the password field is a checkbox labeled "Remember User ID". A line of text states "This site is protected by reCAPTCHA and the Google Privacy Policy and Terms of Service apply." Below this is a "Log In" button. At the bottom, there are links for "Forgot Login Id | Password?" and "Register Insured".

Log In to Your Account

Login Id  
Enter Login ID

Password  
Enter Password

Remember User ID

This site is protected by reCAPTCHA and the Google Privacy Policy and Terms of Service apply.

Log In

[Forgot Login Id | Password?](#)   [Register Insured](#)

**Need Help?**

[password@securitymutual.com](mailto:password@securitymutual.com)

**call your Territory Manager**

# Submit an Endorsement

Enter the Policy Number or you can search by the Insured's name.



Policy

Quote Number	<input type="text"/>	Insured Name	<input type="text"/>	Search
Policy Number	<input type="text"/>	Insured Name	<input type="text"/>	Search

Select the Amend button for the correct policy term.



Policy Summary | Billing Summary | Claims Summary | Diary Summary | Document Summary

Policy Number:  Search

Account Number: 1003062  
2417 N TRIPHAMMER RD  
ITHACA NY 14850-1013

TEST AMENDMENT 1  
A/C ASSOCIATES OF NY INC

Policy Number: 0111004573  
Term: 1  
11/26/2024 to 11/26/2025  
ACTIVE  
Renewable

Paid In Full  
Nothing Due

Payment History  
1  
in the last 30 days  
View Payments

Last Payment  
\$1,289.93  
paid on November 26, 2024

	Term	Effective	Expiration	Premium	
Amend	1	11/26/2024	11/26/2025	\$1,289.93	Active

	Change	Effective	Date	Term Premium
Select	Inquire	NEW BUSINESS	11/26/2024 3:57 PM	\$1,289.93

Enter effective date of Change and confirm



Effective Date

Effective Date

Confirm



# Make Your Changes

## NOTE on Address changes:

When doing an address change, the **Insured's address** should be entered as the **LOCATION/RISK** address and the **Mailing address** should be entered as the **MAILING** address.

You will also have to make sure to select the **postal icon** to standardize the addresses.

Make sure to check the box within the mailing address if the addresses are the same.

You will have to standardize the addressed by selecting the postal icon.

Remember to go to the Location Tab to update location address if changed.

The screenshot shows a software interface for a policy amendment. At the top, there are navigation tabs: Insured (selected), Policy, Location, Premises, Pricing, Reports, and Amend. Below the tabs, the header displays 'TEST AMENDMENT 1', 'Policy : 0111004573', 'Term : 11/26/2024 - 11/26/2025', and 'Change Eff. Date : 01/01/0001'. On the right side of the header, there are buttons for 'Save and Close', 'Undo Amendment', and 'Continue'. The main form area is divided into sections: 'Effective Date' (12/2/2024), 'Expiration Date' (11/26/2025), 'Policy Term' (12 Months), and 'Inception Date' (11/26/2024). Below this is the 'Primary Insured' section with fields for 'Insured Type' (Business), 'Legal Entity' (Individual), 'Business Name' (TEST AMENDMENT 1), and several phone number and email fields. At the bottom, there are two columns for 'Insured's Address' and 'Mailing Address'. The 'Insured's Address' column has a red label 'location' and the 'Mailing Address' column has a green label 'mailing'. A red arrow points to a checkbox labeled 'Mailing same as insured?' in the top right of the mailing address section.

Insured's Address	Mailing Address	Mailing same as insured?
Address Type <b>location</b>	Address Type <b>mailing</b>	<input type="checkbox"/>
Address Name	Address Name	<input type="checkbox"/>
Street Address	Street Address	<input type="checkbox"/>
Apartment, Suite, Etc.	Apartment, Suite, Etc.	<input type="checkbox"/>
City	City	<input type="checkbox"/>
State/Territory	State/Territory	<input type="checkbox"/>
Zip code	Zip code	<input type="checkbox"/>
Country	Country	<input type="checkbox"/>

# Current Endorsements

A PDF of the forms are available by selecting the



You may also search for a form by entering the form number in the search Endorsement field.

You can remove a form by simply select the Remove button.

If you are unsure of the correct form numbers to be used, please contact the Underwriting department.

Current Endorsements							
Filter by Details...		Filter by Category...		Search Endorsements...		Search	Clear
Form Code	Id	Edition	Description	Category	Premium		
LS-12	31	08/12	Waiver of Subrogation ⓘ	N/A	\$0.00		✕ Remove
Name of Person or Organization:			EQUIPMENTSHARE.COM INC				
LS-141A-DISC	26	06/22	Policyholder Disclosure Notice: Employer's Liability Exclusion Third Party Action Over ⓘ	N/A	\$0.00		
LS-141A	25	06/22	Employer's Liability Exclusion ⓘ	N/A	\$0.00		
LS-139A	24	06/22	Communicable Disease Exclusion Clarification ⓘ	N/A	\$0.00		
LS-93	23	05/97	Employment Practices Exclusion ⓘ	N/A	\$0.00		
LS-88	22	05/97	Discrimination Clarification ⓘ	N/A	\$0.00		



# Available Endorsements

Adding Endorsements.

Select the form, then  
Select Add Selected  
Endorsements.

The form will then move  
under Current  
Endorsements

If a form requires  
information, the entry  
field will be yellow. All  
fields that are yellow will  
need to be completed.

Available Endorsements								
+ Add Selected Endorsements			Filter by Category...	Search Endorsements...	Search	Clear		
	Form Code	Edition	Description	Category	Add	Allowed	Info.	Required
<input type="checkbox"/>	THIRD-PARTY	2.0	Third-Party Notification Program ⓘ	N/A	1	1		✓
<input type="checkbox"/>	LS-23	01/88	Additional Insured (Club Members) ⓘ	N/A	1	99		
<input checked="" type="checkbox"/>	LS-25A	05/17	Additional Insured State or Political Subdivision ⓘ	N/A	1	99		✓

Current Endorsements								
			Filter by Details...	Filter by Category...	Search Endorsements...	Search	Clear	
	Form Code	Id	Edition	Description	Category	Premium		
▲	LS-25A	37	05/17	Additional Insured State or Political Subdivision ⓘ	N/A	\$0.00		X Remove
				<b>State or Political Subdivision:</b>	<input type="text"/>			

# Attaching Documents

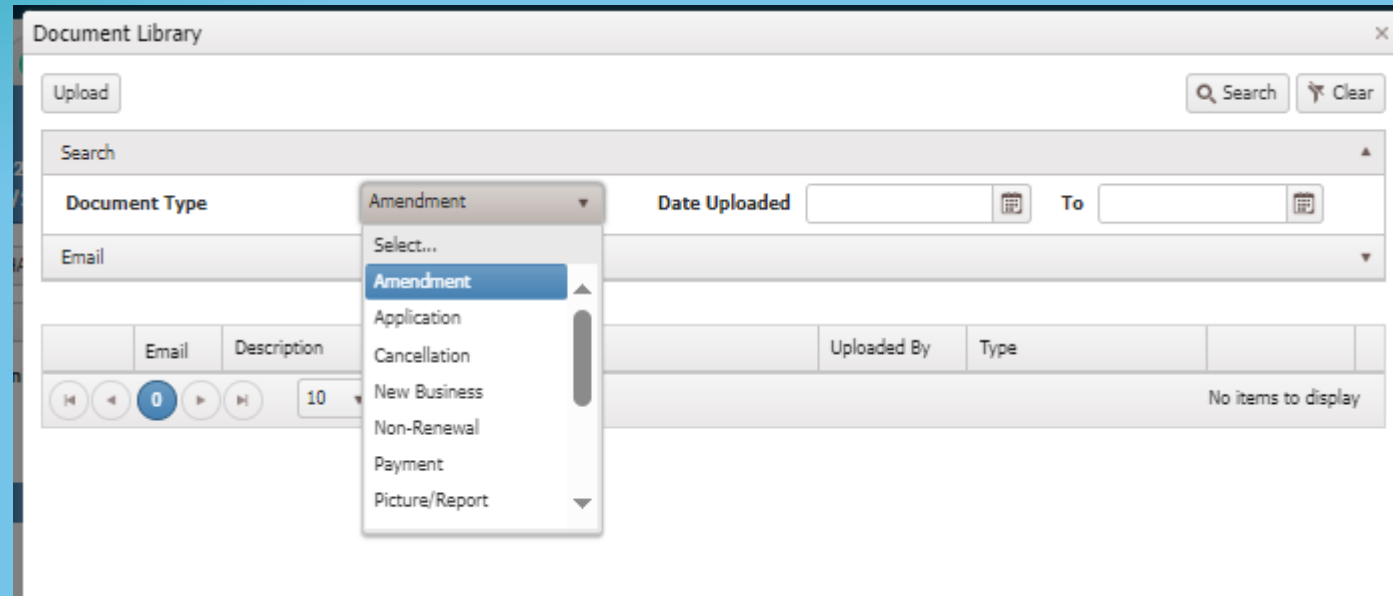
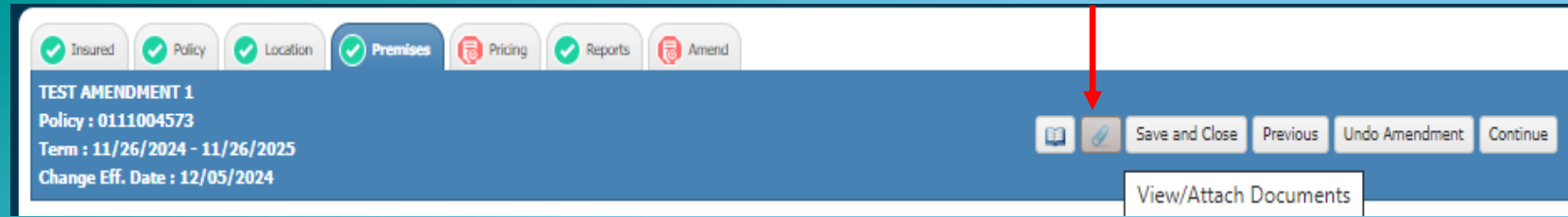
To attach documents to support endorsement changes.

Select the paper clip icon.

Once selected you will get the Document Library.

Select from the Document Type dropdown menu what you are attaching.

Select the Date Uploaded.



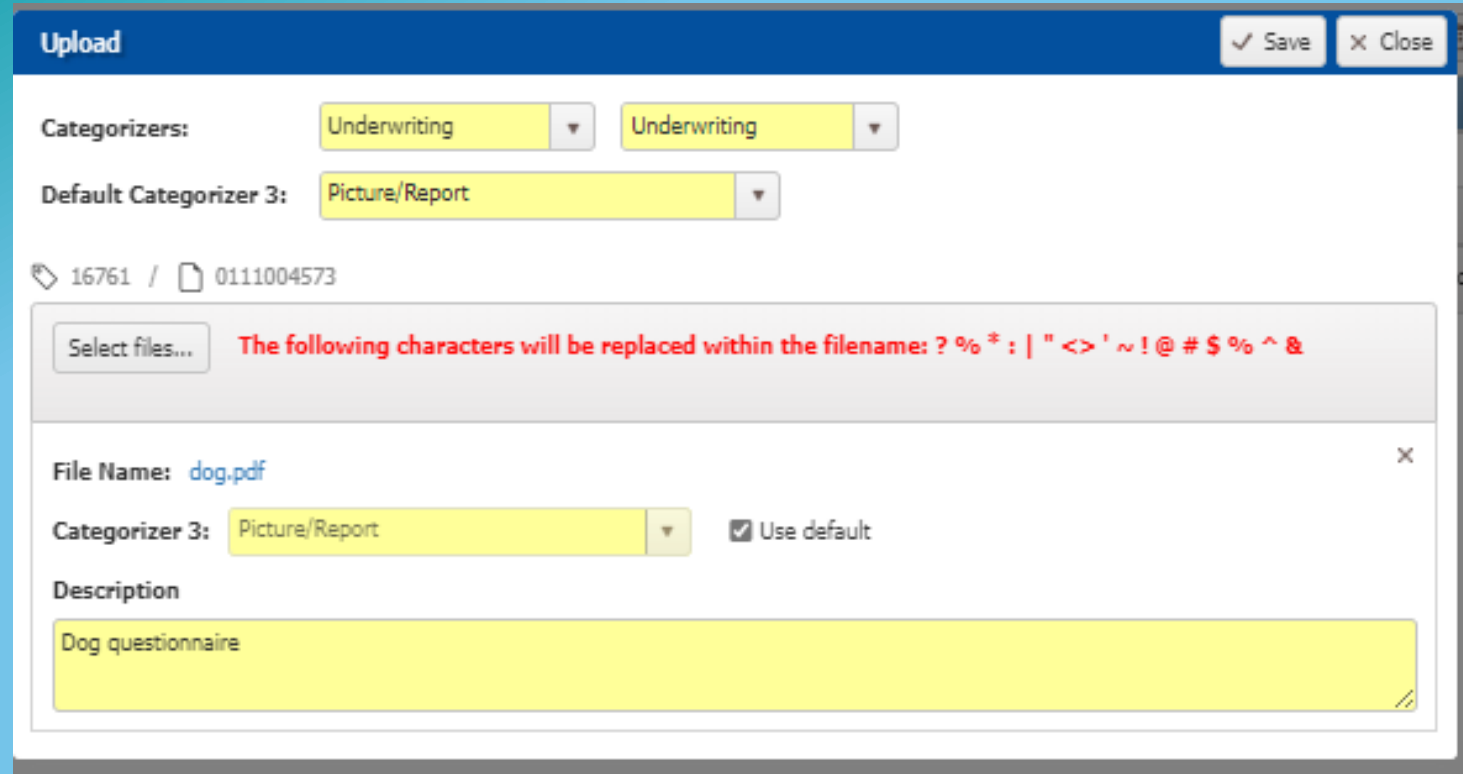
# Attaching Documents

Select Underwriting from the Dropdown  
Select Picture/Report from the dropdown

Drag and Drop your PDF document into  
the red wording area.

In the Description field, type what you are  
attaching.

Save and “x” out.



The screenshot shows an 'Upload' dialog box with a blue header bar containing 'Upload', 'Save', and 'Close' buttons. Below the header, there are three dropdown menus for categorization: 'Categorizers' (two instances, both set to 'Underwriting') and 'Default Categorizer 3' (set to 'Picture/Report'). A red warning message states: 'The following characters will be replaced within the filename: ? % \* : | " < > ' ~ ! @ # \$ % ^ &'. Below this, the 'File Name' field contains 'dog.pdf'. The 'Categorizer 3' dropdown is set to 'Picture/Report' with a checked 'Use default' checkbox. The 'Description' field contains the text 'Dog questionnaire'.

Once you are done making your changes, review the Navigation Tabs at the top.



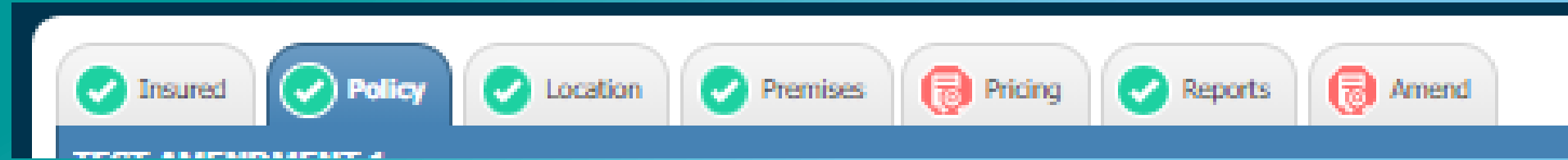
**Green Checkmark:** No more work is required for that screen

**Red Dollar Sign:** screen is missing required information, or a rule is preventing rating or application submission.

**Orange Silhouette:** Underwriter Referral is triggered by a rule that is related to that screen

# Pricing

Make any changes needed to make all Tabs **Green** except the Pricing Tab and the Amend Tab.



Select the Pricing tab. This will show the new Premium amount for the endorsement submitted

The screenshot shows the 'Pricing' tab selected. The interface includes a navigation bar with tabs: 'Insured', 'Policy', 'Location', 'Premises', 'Pricing', 'Reports', and 'Amend'. Below the navigation bar, there is a header section with the following information: 'TEST AMENDMENT 1', 'Policy : 0111004573', 'Term : 11/26/2024 - 11/26/2025', and 'Change Eff. Date : 12/05/2024'. To the right of this information are buttons for 'Save and Close', 'Previous', 'Undo Amendment', and 'Continue'. Below the header is a 'Refresh Rate' button. The main content area displays 'Total Premium: \$1,289.93'. Below this is a table with the following data:

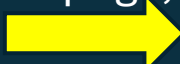
Description	Premium
Coverage A - Building Premium	\$1,269.00
Asbestos Exclusion	(\$1.00)
Silica Exclusion	(\$1.00)
Equipment Breakdown Enhancement Endorsement	\$40.00
Loss Of Income Special Limitations	(\$25.00)
Fire Fee Premium	\$7.93

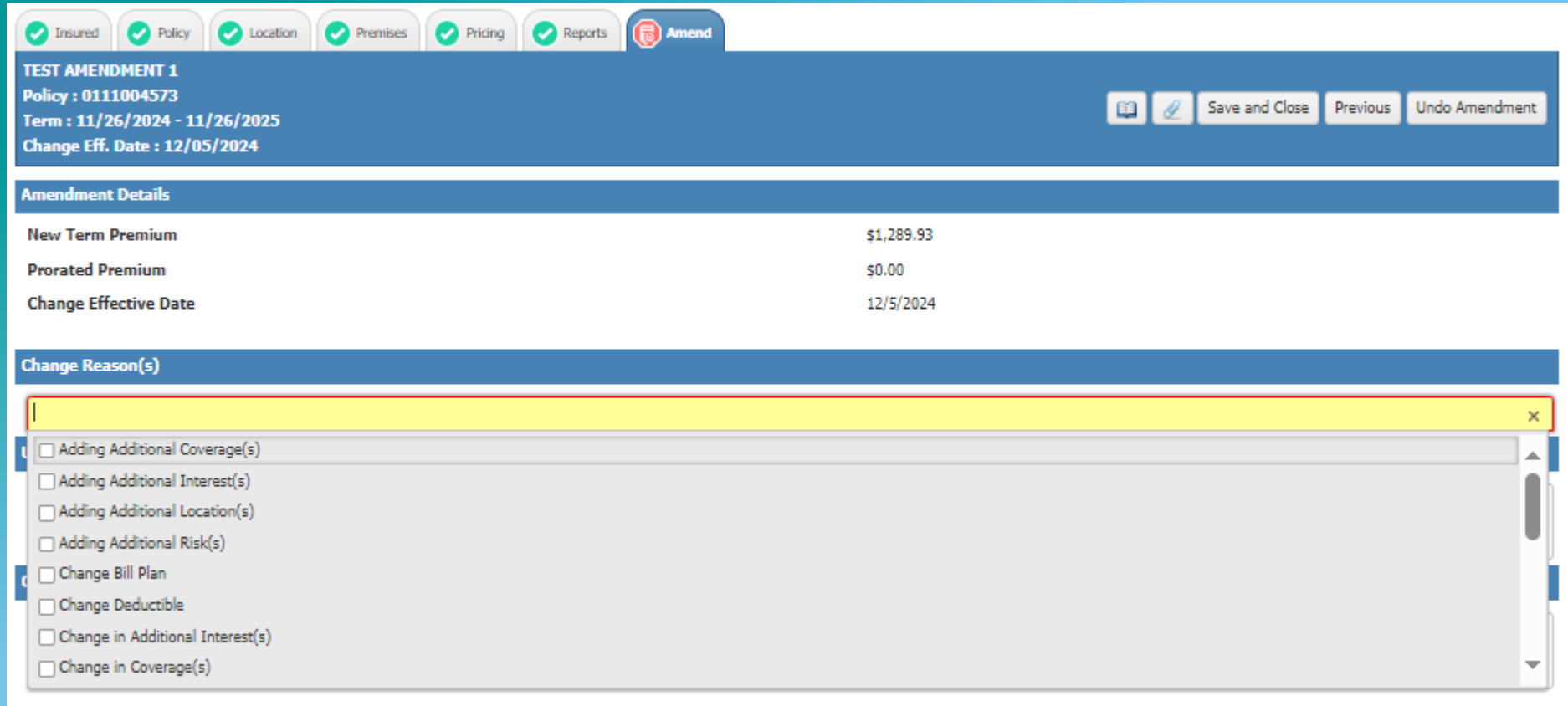
At the bottom of the interface, there are buttons for 'Save and Close', 'Previous', 'Undo Amendment', and 'Continue'.

# Entering Change Reasons

Select the Amend Tab

Select from the dropdown menu what change has been made. This reason code may get changed if the wrong one is selected when we review the Endorsement.

The Change Reason will show on the Dec page, as seen here. 



The screenshot displays the 'Amend' tab in a software interface. At the top, there are navigation tabs for 'Insured', 'Policy', 'Location', 'Premises', 'Pricing', 'Reports', and 'Amend'. Below these, the header shows 'TEST AMENDMENT 1' with details: 'Policy : 0111004573', 'Term : 11/26/2024 - 11/26/2025', and 'Change Eff. Date : 12/05/2024'. Action buttons include 'Save and Close', 'Previous', and 'Undo Amendment'. The 'Amendment Details' section contains a table:

New Term Premium	\$1,289.93
Prorated Premium	\$0.00
Change Effective Date	12/5/2024

Below this is the 'Change Reason(s)' section, which features a dropdown menu. The dropdown is currently open, showing a list of options with checkboxes:

- Adding Additional Coverage(s)
- Adding Additional Interest(s)
- Adding Additional Location(s)
- Adding Additional Risk(s)
- Change Bill Plan
- Change Deductible
- Change in Additional Interest(s)
- Change in Coverage(s)

Declaration Type: Amendment

Amendment Effective Date: 12/03/2024

Description of Change: **Adding Additional Coverage(s)**



Continuing with the Change reason page...

Next you will select a more detailed description of the change.

User Change Made field needs to be filled in.

Whatever you put in this area will show on the Dec page, as seen here.



NOTE: This is **NOT** where you put your requested reason explanations,

Insured Policy Location Premises Pricing Reports Amend

TEST AMENDMENT 1  
Policy : 0111004573  
Term : 11/26/2024 - 11/26/2025  
Change Eff. Date : 12/05/2024

Save and Close Previous Undo Amendment Submit Referral

Amendment Details

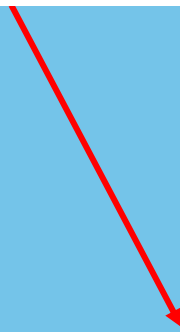
New Term Premium	\$1,289.93
Prorated Premium	\$0.00
Change Effective Date	12/5/2024

Change Reason(s)

Adding Additional Coverage(s) x

User Changes Made

SMIC- SF-532 ADDED Classification Contractor NOC



Declaration Type: Amendment  
Amendment Effective Date:  
12/03/2024 Description of Change:  
Adding Additional Coverage(s) - **SMIC-  
SF-532 ADDED Classification: 35028 -  
Contractor NOC**

# Submitting Referral

Finally, time to submit your Endorsement Referral.

Select the Submit Referral button.

Once selected you will receive this box. This is where you are to put any notes regarding the change request. Basically, whatever you would send in an email for the endorsement, is what should be entered here. An example is shown here.

Select OK –Referral has been submitted.  
Select Ok one more.

Amendment Details	
New Term Premium	\$1,289.93
Prorated Premium	\$0.00
Change Effective Date	12/5/2024

Change Reason(s)

Adding Additional Coverage(s)

User Changes Made

SMIC- SF-532 ADDED Classification Contractor NOC

SubmitReferral

Please provide any comments to the underwriter

Add additional coverage

Insured is now doing snow removal part time please add snow removal coverage.

OK Cancel

Message

Referral has been Submitted

Ok

Thank you for watching.

Should you have any questions, please contact  
your Territory Manager, Underwriting or  
Endorsement Department.