



AGENT PORTAL SUBMITTING ENDORSEMENT REQUESTS

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Click Portal button

MOBILE HOME, HOMEOWNERS EXWIND, HO6 EXWIND, HO4, VACANT, FLOOD, PERSONAL LIABILITY, MISC.

PERSONAL LINES RATERS AND APPLICATION SUBMISSION

GENERAL LIABILITY, GARAGE, CYBER, INLAND MARINE, CANNABIS, PACKAGE, PROPERTY, SPECIAL EVENTS, MISC.


COMMERCIAL LINES RATERS AND APPLICATION SUBMISSION

POLICY LOOKUP: PERSONAL AND COMMERCIAL

AGENT SERVICE PORTAL

There are two ways to request endorsement for a policy. The first way can be done from the ENDORSEMENT REQUEST tab.

Portal will open, click on Request Endorsement Tab



[Raters Link](#) [Policy](#) [Statement](#) [Request Endorsement](#) [Submit FNOL/Claim](#) [Upcoming Renewal](#) [Report](#)

Test Producer | [Log Out](#)
Core Agency (AGT1958)

Mobile Home and ARIC GL Rater

Type in policy number or Insured Name and hit Search.

Once you locate the policy, select the Endorsement Request Link to the far right.

[Raters Link](#) [Policy](#) [Request Endorsement](#) [Submit FNOL/Claim](#) [Upcoming Renewal](#) [Statement](#) [Report](#) [E-Certificates](#) [Agent settings](#)

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Core Agency (AGT1958)

From Date To Date Policy # Insured 0807ARIC

▼ Policy Details

Show entries: 10

Policy #	Insured	Policy Status	Coverage	Eff Date	Exp Date	Endorsement Request
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
0807ARIC	NEW PURCHASE CLAIM Q	Policy In Force	MOBILE HOME	08/07/2018	08/07/2019	Endorsement Request

A new window appears. See below.

- Select Endorsement Effective Date.
- Select Endorsement REASON in list provided.
- Provide an ENDORSEMENT DESCRIPTION.
- Upload any relevant documentation by dragging/dropping document into designated area.
- Hit Submit.

The screenshot shows a 'Request Endorsement' form with the following fields and highlights:

- Policy #:** 0807ARIC
- Insured:** NEW PURCHASE CLAIM Q
- Policy Effective Date:** 04/28/2023
- *Endorsement Effective Date:** 10/20/2023 (highlighted with a red circle)
- *Followup Reason:** Endorsement has been requested via Agent Portal
- *Followup Description:** Endorsement has been requested via Agent Portal
- *Endorsement Reason:** A list of reasons including 'AGENT PORTAL - AMEND COVERAGES: ADD OR DELETE', 'AGENT PORTAL - AMEND INSURED NAME, MAILING ADDRESS OR PHONE NUMBER', 'AGENT PORTAL - AMEND MOBILE HOME SERIAL NUMBER OR MANUFACTURER', and 'AGENT PORTAL - APPLICATION OR PHOTOS' (highlighted with a red circle)
- *Endorsement Description:** Please describe what changes need to be made to the policy for the underwriter to review and process. Also, provide your email address in case we need to contact you. (highlighted with a red circle)
- Upload Application:** Drop files here to upload (highlighted with a red circle)

At the bottom right, there are 'Close' and 'Submit' buttons, with the 'Submit' button highlighted by a red circle. A note at the bottom states: 'PLEASE NOTE : Documents with extensions '.xbap', '.vob', '.lcs', '.rpt', '.wmv', '.dat', '.rar', '.mp3', '.mp4', '.avi', '.emf' are not allowed.'

If the Endorsement Request is submitted successfully then this window will appear.

The screenshot shows a 'Success' message window with the following text:

Success

- Endorsement Details saved successfully.
- Endorsement document uploaded successfully.
- Endorsement Task Trigger saved successfully.
- Endorsement followup saved successfully.
- Endorsement request sent successfully.

Once you close out of the window above you will be able to see all the prior endorsements the agency has requested for this insured through the portal.



Helpful Tip: This screen is not confirmation of a processed endorsement, this section just keeps track of your requests via the portal. To view any processed endorsements you'll need to lookup the policy under the Policy Tab.

Policy Details

Show entries: 10

Search:

Policy #	Insured	Policy Status	Coverage	Eff Date	Exp Date	Endorsement Request
0807ARIC	NEW PURCHASE CLAIM Q	Policy In Force	MOBILE HOME	08/07/2018	08/07/2019	Endorsement Request

Showing 1 to 1 of 1 entries

First Previous 1 Next Last

Endorsement History

Show entries: 10

Search:

Policy #	Insured	Endorsement Eff Date
0807ARIC	NEW PURCHASE CLAIM Q	03/26/2019
0807ARIC	NEW PURCHASE CLAIM Q	10/04/2018
0807ARIC	NEW PURCHASE CLAIM Q	01/30/2019

Showing 1 to 3 of 3 entries

First Previous 1 Next Last

The Second way to Request an Endorsement is to Lookup the Policy on the POLICY TAB.



Helpful Tip: IMMEDIATELY Click **Advance Search Tab** to search all policies within any time frame, past/present/future effective dates.

You can search for the insured either by name or policy number. Advance search lets me see all policies that match my criteria, no matter the time frame.

Type in policy number and hit Search.



Helpful Tip: When searching by Insured name, search by last name. If you must search by full name include the insured's Middle Initial if applicable.

Once you locate the policy you want, click the ENDORSEMENT REQUEST link to the far right of the policy number.

Then the same Endorsement Request window will open and you may proceed with the same steps listed above.

Quick Search **Advance Search**

From Date: To Date:

Policy Number: MHL021215 Insured Name:

Search Clear

Show entries: 10

Search:

Policy #	Insured	Coverage	Policy Status	Carrier	Agent Name	Endorsement Request	E-Certificate
MHL021215	JANE DOE	MOBILE HOME	Policy Expired	LLOYDS OF LONDON - FL		Endorsement Request	

Questions? Please call our office at (352) 638-9400.

OCTOBER 2023