



EPPS ENDORSEMENT QUICK GUIDE

THE ENDORSEMENT MODULE

The Endorsement Module will allow the user to perform any changes to the policy since the moment that policy was issued in ePPS. The module will print the endorsement to be delivered to the insured.

With the Endorsement Module the user will be able to:

1. Add, Modify or Delete a Vehicle
2. Add, Modify or Delete an Additional Coverage
3. Add, Modify or Delete an Additional Insured
4. Add, Modify or Delete an Additional Driver
5. Edit Vehicle Information: License Plate, Vin Number, Vehicle Value, among other changes.

The user can also combine all the changes needed for a specific Policy in one Endorsement.

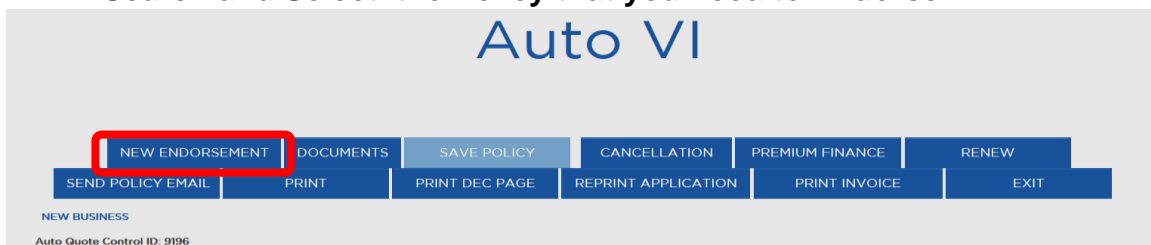
Endorsements can result in:

- a. Additional Premium calculation
- b. Return Premium
- c. No Change in Premium

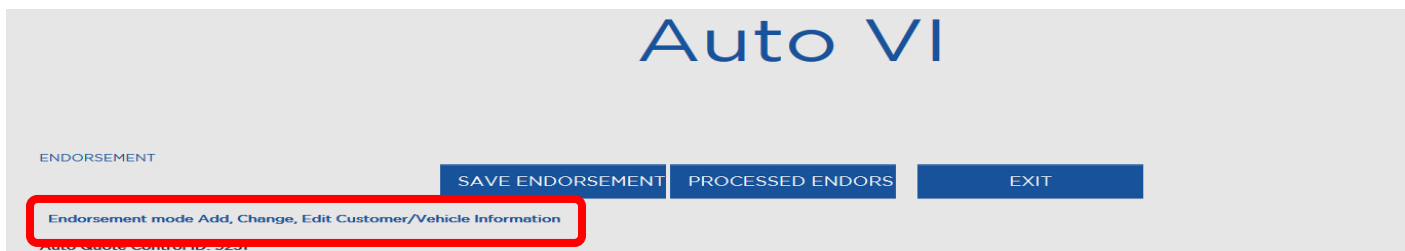
At the End of the Process the user should be able to print the Endorsement whenever needed.

ENDORSEMENT MODULE PROCESS

1. Search and Select the Policy that you need to Endorse



2. Click on **New Endorsement** Button



3. The user should make sure that the **Endorsement Mode Add, change, Edit Customer/Vehicle Information** message is displayed in the screen.

4. Click on **Exit** If the user wants to Exit without doing any changes

Endorsement mode Add, Change, Edit Customer/Vehicle Information

SAVE ENDORSEMENT
PROCESSED ENDORS
EXIT

Auto Quote Control ID: 9251

5. Example on how to **Add a New Vehicle** :
 - a. Open the **Vehicle Information Section**

VEHICLE INFORMATION

Is this a Motorcycle / Scooter?

☐ Yes ☒ No

Is this vehicle:

☐ New ☒ Used

Is this a repaired Salvage Vehicle:

☐ Yes ☒ No

Vehicle Year

2013

Vehicle Make

TOYOTA

Vehicle Model

RAV-4

Island

ST. THOMAS

Vehicle Use

PRIVATE

Insured Value

\$20,000

VIN #

12345EWQASD

License Plate#

123456

Loss Payee

SELECT

- b. **Enter the New Vehicle Information** details: Year, Make, Model, Insured Value, deductibles and coverages
 - c. Go to **Vehicle List**

ADDITIONAL COVERAGES

Modify	Vehicle Year	Vehicle Make	Vehicle Model	VIN	License Plate #	Comprehensive	Collision	BI	PD	MP	Motorist	AD-D	Rental Reim.	Total Premium	Delete
<input type="checkbox"/>	2019	INFINITI	J30	9718TJHXG5TE7TOGH	000111	\$227.00	\$378.00	\$159.00	\$160.00	\$38.00	\$0.00	\$0.00	\$0.00	\$962.00	<input type="checkbox"/>
<input type="checkbox"/>	2019	BHW	328i	RRRRLUUUJ222222	AAXX55	\$966.00	\$1,610.00	\$138.00	\$139.00	\$38.00	\$0.00	\$0.00	\$0.00	\$2,891.00	<input type="checkbox"/>

ADD VEHICLE
CANCEL

- d. Click the Add **Vehicle** button.

ADDITIONAL COVERAGES

Modify	Vehicle Year	Vehicle Make	Vehicle Model	VIN	License Plate #	Comprehensive	Collision	BI	PD	MP	Motorist	AD-D	Rental Reim.	Total Premium	Delete
<input type="checkbox"/>	2019	INFINITI	J30	9718TJHXG5TE7TOGH	000111	\$227.00	\$378.00	\$159.00	\$160.00	\$38.00	\$0.00	\$0.00	\$0.00	\$962.00	<input type="checkbox"/>
<input type="checkbox"/>	2019	BHW	328i	RRRRLUUUJ222222	AAXX55	\$966.00	\$1,610.00	\$138.00	\$139.00	\$38.00	\$0.00	\$0.00	\$0.00	\$2,891.00	<input type="checkbox"/>
<input type="checkbox"/>	2013	TOYOTA	RAV-4	12345EWQASD	123456	\$440.00	\$680.00	\$138.00	\$139.00	\$38.00	\$0.00	\$0.00	\$0.00	\$1,415.00	<input type="checkbox"/>

Add Vehicle
CANCEL

- e. Verify that the correct Vehicle information was added to the list.

6. **Example on how to endorse the policy by Deleting a Vehicle:**
 - a. Go to **Vehicle List**.
 - b. The user must identify in the list the vehicle that needs to be deleted.

ADDITIONAL COVERAGES


Modify	Vehicle Year	Vehicle Make	Vehicle Model	VIN	License Plate #	Comprehensive	Collision	BI	PD	MP	Motorist	AD-D	Rental Reim.	Total Premium	Delete
<input checked="" type="checkbox"/>	2020	INFINITI	J30	97BTJHXGSTE7TQGH	000T2	\$227.00	\$378.00	\$158.00	\$180.00	\$38.00	\$0.00	\$0.00	\$0.00	\$962.00	<input checked="" type="checkbox"/>
<input type="checkbox"/>	2018	TOYOTA	RAV-4	12345EWGASD	123456	\$440.00	\$660.00	\$138.00	\$139.00	\$38.00	\$0.00	\$0.00	\$0.00	\$1,416.00	<input type="checkbox"/>
<input type="checkbox"/>	2019	BMW	328i	RRRLLLLUJ222222	AAXX55	\$886.00	\$1,328.00	\$138.00	\$139.00	\$38.00	\$0.00	\$0.00	\$0.00	\$2,529.00	<input type="checkbox"/>
<input type="checkbox"/>	2010	DODGE	CALIBER 2WD	GRRTRRRRRRRRRRR	YYY777	\$0.00	\$0.00	\$138.00	\$139.00	\$38.00	\$0.00	\$0.00	\$0.00	\$316.00	<input type="checkbox"/>

Add Vehicle

CANCEL

- c. Click on the **Delete** button on the **Right Side** of the row that belongs to the vehicle that the user needs to delete.

ADDITIONAL COVERAGES

Modify	Vehicle Year	Vehicle Make	Vehicle Model	VIN	License Plate #	Comprehensive	Collision	BI	PD	MP	Motorist	AD-ID	Rental Reim.	Total Premium	Delete
	2019	INFINITI	J30	97BTJXGSTE7TQGH	000T1	\$227.00	\$378.00	\$159.00	\$180.00	\$38.00	\$0.00	\$0.00	\$0.00	\$962.00	
	2019	BMW	328i	RRRLLLLUUJ222222	AAXX55	\$886.00	\$1,328.00	\$138.00	\$139.00	\$38.00	\$0.00	\$0.00	\$0.00	\$2,591.00	
	2018	TOYOTA	RAV-4	12345EWGASD	123456	\$440.00	\$660.00	\$138.00	\$139.00	\$38.00	\$0.00	\$0.00	\$0.00	\$1,416.00	

Add Vehicle

CANCEL

- d. Once deleted it will disappeared from the Vehicle List.

7. Example on how to endorse a policy by Modify Any Existing Vehicle:

- a. Go to the **Vehicles List**

ADDITIONAL COVERAGES

Modify	Vehicle Year	Vehicle Make	Vehicle Model	VIN	License Plate #	Comprehensive	Collision	BI	PD	MP	Motorist	AD-D	Rental Reim.	Total Premium	Delete
<input checked="" type="checkbox"/>	2020	INFINITI	J30	97BTJHXGSTE7TQGH	000T2	\$227.00	\$378.00	\$159.00	\$180.00	\$38.00	\$0.00	\$0.00	\$0.00	\$962.00	<input checked="" type="checkbox"/>
<input type="checkbox"/>	2013	TOYOTA	RAV-4	12345EWGASD	123456	\$440.00	\$660.00	\$138.00	\$139.00	\$38.00	\$0.00	\$0.00	\$0.00	\$1,416.00	<input type="checkbox"/>
<input type="checkbox"/>	2019	BMW	328i	RRRLLLLUUJ222222	AAXX55	\$886.00	\$1,328.00	\$138.00	\$139.00	\$38.00	\$0.00	\$0.00	\$0.00	\$2,529.00	<input type="checkbox"/>
<input type="checkbox"/>	2010	DODGE	CALIBER 2WD	GRRTRRRRRRRRRRR	YYY777	\$0.00	\$0.00	\$138.00	\$139.00	\$38.00	\$0.00	\$0.00	\$0.00	\$315.00	<input type="checkbox"/>

Add Vehicle

CANCEL

- b. Click on **Modify** Button at the **Left Side** of the row corresponding to the vehicle to Modify.

ADDITIONAL COVERAGES

Modify	Vehicle Year	Vehicle Make	Vehicle Model	VIN	License Plate #	Comprehensive	Collision	BI	PD	MP	Motorist	AD-ID	Rental Reim.	Total Premium
<input checked="" type="checkbox"/>	2020	INFINITI	J30	97BTJHXGSTE7TQGH	000T2	\$227.00	\$378.00	\$159.00	\$180.00	\$38.00	\$0.00	\$0.00	\$0.00	\$962.00
<input type="checkbox"/>	2018	TOYOTA	RAV-4	12345EWGASD	123456	\$440.00	\$660.00	\$138.00	\$139.00	\$38.00	\$0.00	\$0.00	\$0.00	\$1,416.00
<input type="checkbox"/>	2019	BMW	328i	RRRLLLLUJ222222	AAXX55	\$886.00	\$1,328.00	\$138.00	\$139.00	\$38.00	\$0.00	\$0.00	\$0.00	\$2,529.00
<input type="checkbox"/>	2010	DODGE	CALIBER 2WD	GRRTRRRRRRRRRR	YYY777	\$0.00	\$0.00	\$138.00	\$139.00	\$38.00	\$0.00	\$0.00	\$0.00	\$315.00

Save Vehicle

CANCEL

- c. A Red Square appears around the Vehicle List to let the user know that the system will allow any modification to the selected vehicle.

VEHICLE INFORMATION

Is this a Motorcycle / Scooter?

☐ Yes ☒ No

Is this vehicle:

☐ New ☒ Used

Is this a repaired Salvage Vehicle:

☐ Yes ☒ No

Vehicle Year:

Vehicle Make:

Vehicle Model:

Island:

Vehicle Use:

Insured Value:

VIN #:

License Plate#:

Loss Payee:

d. The user can perform all the **necessary changes** in the **Vehicle Information**.

ADDITIONAL COVERAGES

Modify	Vehicle Year	Vehicle Make	Vehicle Model	VIN	License Plate #	Comprehensive	Collision	IR	PD	RP	Motorist	AD-D	Rental Reim.	Total Premium
<input type="checkbox"/>	2009	BMW	JSD	978TJ80G5TE710GH	0000H	\$227.00	\$376.00	\$159.00	\$160.00	\$38.00	\$0.00	\$0.00	\$0.00	\$962.00
<input type="checkbox"/>	2013	TOYOTA	RAV-4	12345EWGASD	123456	\$440.00	\$660.00	\$138.00	\$139.00	\$38.00	\$0.00	\$0.00	\$0.00	\$1,415.00
<input type="checkbox"/>	2019	BMW	328i	RRRLLLLUUJ222222	AAXX55	\$886.00	\$1,328.00	\$138.00	\$139.00	\$38.00	\$0.00	\$0.00	\$0.00	\$2,529.00
<input type="checkbox"/>	2010	DODGE	CALIBER 2WD	GRRTTRRRRRRRRRRR	YYY777	\$0.00	\$0.00	\$138.00	\$139.00	\$38.00	\$0.00	\$0.00	\$0.00	\$315.00

e. Click on **Save Vehicle**.

ADDITIONAL COVERAGES

Modify	Vehicle Year	Vehicle Make	Vehicle Model	VIN	License Plate #	Comprehensive	Collision	IR	PD	RP	Motorist	AD-D	Rental Reim.	Total Premium	Update
<input type="checkbox"/>	2009	BMW	JSD	978TJ80G5TE710GH	0000H	\$227.00	\$376.00	\$159.00	\$160.00	\$38.00	\$0.00	\$0.00	\$0.00	\$962.00	<input type="checkbox"/>
<input type="checkbox"/>	2013	TOYOTA	RAV-4	12345EWGASD	123456	\$440.00	\$660.00	\$138.00	\$139.00	\$38.00	\$0.00	\$0.00	\$0.00	\$1,415.00	<input type="checkbox"/>
<input type="checkbox"/>	2019	BMW	328i	RRRLLLLUUJ222222	AAXX55	\$886.00	\$1,328.00	\$138.00	\$139.00	\$38.00	\$0.00	\$0.00	\$0.00	\$2,529.00	<input type="checkbox"/>
<input type="checkbox"/>	2010	DODGE	CALIBER 2WD	GRRTTRRRRRRRRRRR	YYY777	\$0.00	\$0.00	\$138.00	\$139.00	\$38.00	\$0.00	\$0.00	\$0.00	\$315.00	<input type="checkbox"/>

f. Verify that all the changes are presented correctly in the vehicle row with the corresponding Vehicle Information. Verify that the Total Premium amount is correct.

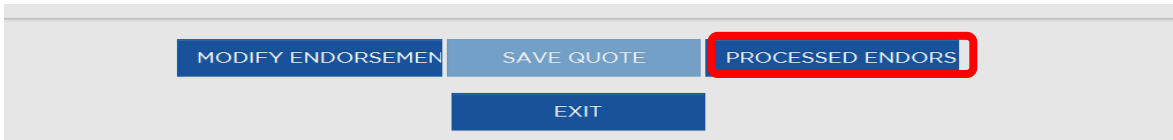
HOW TO COMPLETE THE ENDORSEMENT

Once you have finished all your Endorsement Changes:

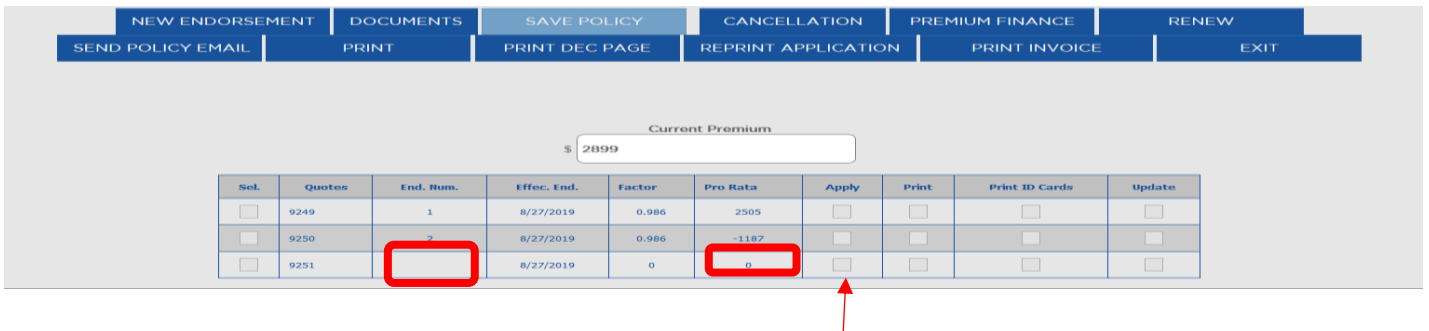
- ✓ Make sure you verify that all the new information is correct before you go to the next step.
**Once you click on Save Endorsement there is no way to go back.*



1. Click on **Save Endorsement** Button



2. Click on **Processed Endors**, this will take the user back to the previous screen to complete the process.



3. Scroll to the Bottom of the Page to look for the **Endorsements List**. The endorsement are identified by a sequential number assigned once the transaction is applied.
4. Look for the **Latest Endorsement on the Bottom of the List that doesn't have an Endorsement Number (End. Num.) Assigned to it yet.**
5. Click on the **Apply** button on the line of the endorsement the user is about to create. Once Applied, an endorsement number is assigned by the system. Also after applied the endorsement, the endorsement detail information is displayed in the screen.

NEW ENDORSEMENT | DOCUMENTS | CANCELLATION | PREMIUM FINANCE | RENEW | SEND POLICY EMAIL

PRINT | PRINT DEC PAGE | REPRINT APPLICATION | PRINT INVOICE | EXIT

ENDORSEMENT SECTION

Effective Date: 08/27/2019

Factor: 0.986

ProRata: 1070

Sections	Actual	Previous	Difference
Auto	3,984.00	2,899.00	1,085.00
Total	3,984.00	2,899.00	1,085.00

Endorsement Premium: 1,070.00

Comments: The following vehicle has been added: 2013 TOYOTA RAV-4 12345EWQASD
Insured Value (ACV): \$20,000.00
With coverage and limits as shown below:
Bodily Injury: \$10,000/\$20,000
Property Damage: \$10,000

Cancel Update

6. The **Endorsement Section will be displayed** showing detailed information such as Effective Date, Factor, Actual and Previous Premium and Difference if applies and a Comments field showing all the endorsement changes made to that specific Policy.

7. Click on **Update**

Sel.	Quotes	End. Num.	Effec. End.	Factor	Pro Rata	Apply	Print	Print ID Cards	Update
<input type="checkbox"/>	9249	1	8/27/2019	0.986	2505	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	9250	2	8/27/2019	0.986	-1187	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	9251	3	8/27/2019	0.986	1070	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

8. On the **Endorsement List**, now the **Endorsement has a Number** assigned to it.

Sel.	Quotes	End. Num.	Effec. End.	Factor	Pro Rata	Apply	Print	Print ID Cards	Update
<input type="checkbox"/>	9249	1	8/27/2019	0.986	2505	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	9250	2	8/27/2019	0.986	-1187	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	9251	3	8/27/2019	0.986	1070	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

9. On the same row with your new Endorsement, click on **Print** and a PDF version of the endorsement will be available and ready to be printed.

Endosos - EndorsementEDUARD9196-523.pdf - Mozilla Firefox

192.168.21.11:84/ExportFiles/EndorsementEDUARD9196-523.pdf

Guardian
INSURANCE

The Guardian Building
P.O. Box 9109
St. Thomas, U.S. Virgin Islands 00801
Telephone (340) 776-8050 • Facsimile (340) 774-8830

Customer **103728**: This endorsement, effective **Tuesday, August 27, 2019** forms part of policy no. **PAP332149-00** issued to.

EDUARD MUNCH
202 ELSEWHERE UNIT 2 ST.
THOMAS 00915 VI


The following vehicle has been added: **2013 TOYOTA RAV-4 12345EWQASD**

Insured Value (ACV): **\$20,000.00**

With coverages and limits as shown below:
Bodily Injury: \$10,000/\$20,000
Property Damage: \$10,000
Medical Payments: \$1,000/\$5,000
Comprehensive & Collision Deductible: \$500/\$1,000

All other term and conditions remain unchanged.

Total Premium for the above amendments to Policy **\$1,070.00**

Authorized Signature  Date: **8/27/2019**

10. Validate that the Endorsement Document Contains all the necessary details:

- Customer Number of the Insured
- Endorsement Date
- Policy Number
- Insured Name and Address
- Endorsement Changes contains all the changes made to the Policy
- Endorsement Premium change if applies

Sel.	Quotes	End. Num.	Effec. End.	Factor	Pro Rata	Apply	Print	Print ID Cards	Update
<input type="checkbox"/>	9249	1	8/27/2019	0.986	2505	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	9250	2	8/27/2019	0.986	-1187	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	9251	3	8/27/2019	0.986	1070	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

11. On the same row with your new Endorsement, click on **Print ID Cards** to print the Vehicle id card in case a New Vehicle has been added through the endorsement process.