

# INSTANT MORTGAGEE CHANGES

## JUST 3 STEPS ON THE SSIU PORTAL

### STEP 1 - Select the Policy Record

- Login to the portal and click **Request Endorsement** from the main navigation menu.
- Locate the Policy record using the search criteria.
- Click **Endorsement Request** next to the selected policy in the grid (see illustration below).

Policy #	Insured	Policy Status	Coverage	Eff Date	Exp Date	Endorsement Request
856941	Ricky v Test	Policy In Force	Homeowners	03/31/2020	03/31/2020	Endorsement Request

## CONTACT US

P 251.923.4474  
F 251.923.4486  
E info@ssiuw.com

**RATER & AGENT PORTAL**  
portal.ssiuw.com

**SUBMISSIONS TEAM**  
submissions@ssiuw.com

**BINDING TEAM**  
binder@ssiuw.com

**ENDORSEMENTS TEAM**  
endorse@ssiuw.com

**CLAIMS TEAM**  
claims@ssiuw.com

**ACCOUNTING TEAM**  
accounting@ssiuw.com

**INSPECTIONS TEAM**  
inspections@ssiuw.com

[www.ssiuw.com](http://www.ssiuw.com)

### STEP 2 - Start the Endorsement

- The Request Endorsement window will open and ask *Is this a Mortgagee Change Endorsement*. Click **Yes** to begin the endorsement.

Is this a Mortgagee Change Endorsement?

No Yes

### STEP 3 - Add, Change or Delete Mortgagees

- **Note the message regarding Direct Billed Policies and Open Claims!**
- Review the current Mortgagee Detail in the grid. Click to delete the current Mortgagee.
- Select the **Interest Type** from the drop down menu.
- Enter the Mortgagee Name, Address, Loan Number, etc. in the fields  
*TOOL TIP! Many Mortgagees are pre-populated in our database. Start typing the Mortgagee information, and select the Mortgagee from the drop-down to auto-populate the details.*
- Enter the **Endorsement Effective Date**.
- Is the policy Billed to the Mortgagee? Select **Yes** or **No** for Primary/Bill To.
- Review your entry, click **Save**. The new Mortgagee information will populate in the grid at the top of the screen.
- If needed, add a Second and/or Third Mortgagee using these same steps.
- Review the information for correctness, click **Submit** to finalize the endorsement.

### Click Submit... That's it!

- Upon clicking **Submit**, an email confirmation including a copy of the Endorsement will be sent to you and submitted to SSIU for the policy record. The endorsement document will also be available for download in our Portal.
- Note, a new declarations page does not populate when using this automated process. Please generate an EOI if proof of coverage is required by the lender.

# INSTANT MORTGAGEE CHANGES

JUST 3 STEPS ON THE SSIU PORTAL

## CONTACT US

P 251.923.4474  
F 251.923.4486  
E info@ssiuw.com

RATER & AGENT PORTAL  
portal.ssiuw.com

SUBMISSIONS TEAM  
submissions@ssiuw.com

BINDING TEAM  
binder@ssiuw.com

ENDORSEMENTS TEAM  
endorse@ssiuw.com

CLAIMS TEAM  
claims@ssiuw.com

ACCOUNTING TEAM  
accounting@ssiuw.com

INSPECTIONS TEAM  
inspections@ssiuw.com

www.ssiuw.com

Is this a Mortgagee Change Endorsement?

No Yes

## Request Endorsement

Endorsement Reason Mortgage Detail

This policy's current mortgagee(s) appears below. To change a mortgagee, click Delete next to the current mortgagee, then enter the new mortgagee details below. Click Save, then click Submit.

**DIRECT BILLED POLICIES** - If this policy is direct billed and is expiring within the next 45 days, please email [directbilling@ssiuw.com](mailto:directbilling@ssiuw.com) to advise the update of the mortgagee so the renewal can be properly billed.

**OPEN CLAIMS** - If there is an open claim on this policy, please email [claims@ssiuw.com](mailto:claims@ssiuw.com) to advise of the update in mortgagee so claim settlements are issued to the correct parties.

Interest Type	Name	Address	City/State/Zip	LoanNo	Endorsement Eff. Date	Description	Fax	Primary/Bill To	Delete
MORTGAGEE	Client c/o LoanCare, LLC ISAOA/ATIMA	PO Box 202049	Florence,SC,29502	123456	01/04/2021			No	

Interest Type:

MORTGAGEE

\*Name:

Additional Interest Name

\*Address:

Address

\*City/State/Zip:

City/State/Zipcode

Loan No:

Reference no.

\*Endorsement Effective Date:

Description:

Description

Fax:

Fax

Primary/Bill To:

Yes No

Save

Clear

Submit