

# MORTGAGEE CHANGE

JUST 3 STEPS ON THE SSIU PORTAL

## STEP 1 - SELECT THE POLICY TO ENDORSE

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

RATER LINK POLICIES STATEMENTS **REQUEST ENDORSEMENT** SUBMIT CLAIM UPCOMING RENEWAL REPORTS INSURED STATEMENT

From Date  To Date  Policy # / Insured  Search Clear

Policy Details

Show entries: 10 Search:

Policy #	Insured	Policy Status	Coverage	Eff Date	Exp Date	Endorsement Request
Search	Search	Search	Search	Search	Search	Endorsement Request
856941	Ricky v Test	Policy In Force	Homeowners	03/31/2020	03/31/2021	Endorsement Request

## 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



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Questions/Assistance:  
endorse@ssiuw.com

\* **Tool Tip:** Many Mortgagees are pre-populated in our database. Start typing the Mortgagee information, and select 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.

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	Community Trust Bank dba Cimarron Mortgage	PO Box 12830	Jackson,MS,39236	123456	12/28/2020		(850)123-4569	Yes	

Interest Type:

\*Name:

\*Address:

\*City/State/Zip:

Loan No:

\*Endorsement Effective Date:

Description:

Fax:

Primary/Bill To:

**CLICK SUBMIT... THAT'S IT!**

- Upon clicking **Submit**, an email confirmation including a copy of the Endorsement and new Declaration Page will be sent to you and submitted to SSIU for the policy record. The endorsement document will also be available for download on our Portal.