

1. Pull up the policy & click on “activity”

POLICY INFO

Summary
Accounting
Status
Activity
Audit

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Policy: Status: Effective Expiratic Carry Da
Last Enc Pending
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a.

2. Click on the “note” button:

Notes/Suspenses

Notes & Suspenses - 10 Total	ADD: Note Suspense
Attachments - 3 Total	ADD: Attachment
App Attachments - 0 Total	

Policy Documents

E-Signature Document Link
POS Docs Link

a.

3. Type in the endorsement rationale and then hit “submit” to save the note to the policy.

Add Note

Note Type: Phone

Note Subject: EXAMPLE

Note Date: 07/13/2018 (mm/dd/yyyy)

Note Body: EXAMPLE

Characters Remaining 2993

Internal Note

Submit

b.