

# Additional Insured Endorsement

## Quick Card



### Overview

This quick card will outline how to add an additional insured to an existing policy. Access your policy through GreatBuilderUSA. **NOTE – only one endorsement may be processed at a time.**

<p>1.) Click <b>Endorse</b> on the left side of the screen. Click <b>Next</b>.</p>	<p>The screenshot shows a software interface with a left-hand navigation menu. Under the 'Actions' section, the 'Endorse' option is highlighted in yellow. The main content area contains instructions: 'To begin an ENDORSEMENT or POLICY EXTENSION, please select Endorse from the Actions widget in the left corner of your screen.' and 'To request a CANCEL, please select Send E-mail from the Actions widget in the left corner of your screen. Select and Complete the 'Agent Cancel Request' and send to RC.Referal@GAIG.com.' Below this, there is a field for 'Policy Effective Date' with the value 'January 23, 2023'. At the bottom right, there are 'Save &amp; Refresh' and 'Next &gt;' buttons.</p>
<p>2.) Select <b>Additional Insured</b> and then click the right arrow to move the selection over. Click <b>Next</b>.</p>	<p>The screenshot shows a software interface with a dropdown menu for 'Endorsement Type'. The options listed are: Mortgagee, Named Insured - Amend Mailing Address, Amend Risk Location, Limit Change, Policy Extension, Coverages, Other, and Loss Payee. The 'Additional Insured' option is highlighted in yellow. A red arrow points from the 'Additional Insured' option to the right, indicating the next step. At the bottom right, there are 'Save &amp; Refresh' and 'Next &gt;' buttons.</p>
<p>3.) Complete the Endorsement Effective Date Override if need be. Then choose the Additional Insured type from the drop-down options. Answer loss history question. Click <b>Next</b>.</p>	<p>The screenshot shows a software interface with a heading 'PLEASE COMPLETE THE FOLLOWING INFORMATION AND CLICK 'NEXT''. Below this, there are several fields: 'Policy Effective Date' (January 10, 2023), 'Policy Expiry Date' (January 10, 2024), 'Endorsement Effective Date' (April 12, 2023), and 'Endorsement Expiry Date' (January 10, 2024). There is a date picker for 'Endorsement Effective Date Override' with the format 'M/d/yyyy'. Below this is a dropdown menu for 'Additional Insured' with the text '-- Please Select --'. At the bottom, there is a question 'Has a loss occurred at this risk location?' with radio buttons for 'Yes' and 'No'. At the bottom right, there are '&lt; Previous', 'Save &amp; Refresh', and 'Next &gt;' buttons.</p>

4.) Click **Add**.

The screenshot shows a table titled 'Additional Insured' with columns: Name, ATTN, Address, Address Line..., City, State, Zip/Postal C..., Status, and Activity This... The table is currently empty. Below the table, there is a 'Ready.' status and a yellow 'Add' button. Navigation buttons for '< Previous', 'Save & Refresh', and 'Next >' are also visible.

5.) Enter **Name, Address, City, State, and Zip Code** for the Additional Insured. Once all the information is entered click **Save & Close**.

The screenshot shows the 'Additional Insured' form with the following fields: Name \*, ATTN, Address \* [?] (with a help icon), Address Line 2, City \* [?] (with a help icon), State \* (dropdown menu), Zip/Postal Code \*, and Status [?] (with a help icon). The Status field is set to 'Active'. At the bottom, there are buttons for 'Save', 'Save & New', 'Save & Close' (highlighted in yellow), and 'Close'.

6.) Click **Save & Refresh**.

The screenshot shows the 'Additional Insured' table with one row containing the name 'Active'. The 'Add' button is now greyed out. The 'Save & Refresh' button is highlighted in yellow. Navigation buttons for '< Previous', 'Save & Refresh', and 'Next >' are visible.

7.) Endorsement will move into Quoted status. Premium should show \$0 for this endorsement type. Click **Submit to Issue**.

The screenshot shows the 'Additional Insured' screen with a sidebar on the left containing 'Common Screens' and 'Actions'. The 'Submit to Issue' button is highlighted in yellow. A red callout box with an arrow points to the 'Premium (USD)' field, which displays '\$0.00'. The status of the endorsement is 'Endorsement - Quoted'. Navigation buttons for '< Previous', 'Submit to Issue', 'Save & Refresh', and 'Next >' are visible.

8.) Click **Print Document** on the left side of the screen to pull endorsement form.

The screenshot shows the 'Additional Insured' screen with a sidebar on the left containing 'Common Screens' and 'Actions'. The 'Print Document' button is highlighted in yellow. A red callout box with an arrow points to the 'Premium (USD)' field, which displays '\$0.00'. The status of the endorsement is 'Endorsement - Bound and Issued'. Navigation buttons for '< Previous', 'Print Document', 'Save & Refresh', and 'Next >' are visible.