

Client Portal: Create a Location Endorsement to Make Changes to a Location



Learn how to initiate a new endorsement for an insurance policy and update contact information for a specific property location. This guide walks you through navigating the schedule settings and adjusting building coverage limits to ensure accurate records.

Endorsement Initiation

1

To make a change to an existing location, navigate to the "My Location" section of the dashboard.

Location the "In Force" policy you would like to request a change to.

If you do not see the property on the initial screen, click the hyperlink in the lower left corner of the widget.

Add a Location, Review Contact Information, and Review Invoices.

My Locations

Active Location Policies

Policy Number	Account	Status	Street1	Street2	City	State	Postal Code	Effective Date
28-000-0001		In Force			Philadelphia	Pennsylvania		06/15/2021
28-000-0002		In Force			PHILADELPHIA	Pennsylvania		07/01/2021
28-000-0003		In Force			PHILADELPHIA	Pennsylvania		07/01/2021
28-000-0004		In Force			PHILADELPHIA	Pennsylvania		07/01/2021
28-000-0005		In Force			PHILADELPHIA	Pennsylvania		07/01/2021
28-000-0006		In Force			PHILADELPHIA	Pennsylvania		07/01/2021
28-000-0007		In Force			PHILADELPHIA	Pennsylvania		07/01/2021
28-000-0008		In Force			PHILADELPHIA	Pennsylvania		07/01/2021

1 to 8 of 8

Location Policies Pending Cancellation

Policy Number	Account	Status	Street1	Street2	City	State	Postal Code	Cancellation Date	Effective Date	Expiry Date
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0 to 0 of 0

Inactive Location Policies

Policy Number	Account	Status	Street1	Street2	City	State	Postal Code	Cancellation Date	Effective Date	Expiry Date
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0 to 0 of 0

Request a Change in Coverage or Cancel your Coverage on a Location.



Tip!

- Policy Status.
 - In Force = Currently Active
 - Cancelled = Not Active
 - Renewed = Expired
 - Issued = Future Effective Date

2

Click "Create Endorsement" button to request a change to coverage and occupancy status information.

The screenshot displays the PRISCATECH web application interface. At the top, there is a navigation bar with the PRISCATECH logo and a 'Return to Dashboard' link. Below this, a header section shows the policy number '26-000' and the name 'I-0003 - Shena Holland'. Two buttons are visible: 'Generate EOI' and 'Create Endorsement', with the latter being highlighted by a red rectangular box. The main content area is divided into three sections: 'EOI', 'Endorsements', and 'Account Details'. The 'EOI' section contains a message about generating an Evidence of Insurance (EOI). The 'Endorsements' section provides instructions on how to make changes to the policy using the 'Create Endorsement' button and lists two types of endorsements: 'Endorsement' (for coverage changes) and 'Non-Premium Bearing Endorsement' (for lender or property manager information updates). The 'Account Details' section shows the account number 'NR00000' and the billing account name 'Jonathan'. A sidebar on the right side of the page shows a list of files, including 'EOI - 26-000...I-0003 - 26-27 - 20200608.pdf'.

3

There are two types of endorsements: Premium-Bearing Endorsements and Non-Premium-Bearing Endorsements.

Endorsements

Premium-Bearing Endorsements, listed simply as Endorsements, may impact the cost of the insured location. These changes typically involve updates to coverage, occupancy status, or other factors that can affect the premium.

Non-Premium-Bearing Endorsements

Non-Premium-Bearing Endorsements are limited to changes involving contacts associated with a location. Examples include:

- Lender updates
- Additional Insured changes
- Property Manager updates
- Other contact-related changes

Note: If needing to update a location schedule contact as well as coverage information, please submit as an "Endorsement."

How to Submit an Endorsement

Select the endorsement type you need and click the calendar icon to choose the date on which you would like the changes to become effective.

Once selected, click "Create Endorsement" in the upper right corner of the page.

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Return to Dashboard

New Endorsement Create Endorsement Cancel

Endorsement Details

Insured: [Blank]

Policy Number: 26-000-0003

Effective Date: 07/01/2026

Expiry Date: 07/01/2027

Select "Non-Premium Bearing Endorsement" only if you are changing Lender or Property Manager information. "Endorsement" should be used for all other change types.

Endorsement Type: Endorsement

Change Effective Date: The Change Effective Date must be on or after the first day of June. Click to select date from calendar

Contact Management

4

Navigate to the "Location Schedules" and slide the hyperlinked "Location Number" to view the location specific details.

Return to Dashboard

E-26-000 -0003-1 -

✓ Endorsement record created.

Proposal Detail

Account:

Proposal Number: E-26-000 0003-1

Effective Date: 07/01/2026

Expiry Date: 07/01/2027

Change Effective Date: 07/01/2026

Instructions

Click into the Location Schedule Below to amend your Location Questionnaire with Change Requests.
You will not be able to navigate back to this page from your Dashboard.
Ensure your changes are completely logged to the Location Schedule prior to exiting.

Location Schedules

Location Number	BillingLevel	BillingFrequency	Payment Option	Add Date	Street1	City	Code	Postal Code	Type	Status	Cause	ITV	Total Value	Cost	Cost Monthly (Est)
0C I-000003	Account Bill	Monthly				PHILADELPHIA	PA		MF	V	B	120.00	332,160.00	3,801.29	316.77
												332,160.00	3,801.29	316.77	

1 RECORDS

5

To update an Location Schedule Contact such as, adding a lender, additional insured, property manager, etc. Select "New Location Schedule Contact"

E-26-000 -0003-1

Schedule: 00 -I-000003 -

Edit Location Schedule

Location Schedule Contacts

[New Location Schedule Contact](#)

Name	Contact Type	Title	Email	Work Phone	Role
	Location Contact				Owner
	Location Contact				Additional Insured, Land Contract

General Information

Account:

Effective Date: 07/01/2026

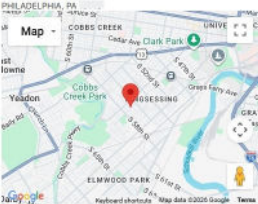
Expiry Date: 07/01/2027

Endorsement Type: Endorsement

Address Information

PHILADELPHIA, PA

Map



6 Click the magnifying glass icon to lookup or create a new contact.

6-26-000 -0003-1 -
Schedule: 00 -000003 -
Edit Location Schedule

New Location Schedule Contact

Save and Close Save Changes Cancel

Select the magnifying glass to Create a New Contact

Contact: * 

Contact Type: - None Selected -

7 Select from previously entered contacts by you or click "New Location Contact" to add a new contact.

Use the search field on the right side if you have multiple contacts to select from.

6-26-000 -0003-1 -
Schedule: 00 -000003 -
Edit Location Schedule

New Location Schedule Contact

Contact

New Location Contact

File As a	Contact Type	Is Payee	Street1	City	State	Work Phone	Email
John, Testing	Location Contact		1234 Latouche St	Anchorage	Alaska	(816) 555-8233	John@Testing.com

Filter By

Name

File As

Company Name

Last Name

First Name

Email

Work Phone

State

All

Contact Type

Location Contact

Search Clear

8 Enter the contact information for the Location Contact.

If it is a company, please check the "Is Company" box

Once Completed select "Save Changes" to continue

PRISCATECH
Return to Dashboard

Schedule: 000 -0009 - 11534 N 128th PI

New Contact

Name

File As: *

☒ Is Company

First Name: *

Middle Name:

Last Name: *

Title:

Contact Type: Location Contact

Vendor Specialty:

Contact Info

Preferred Communication: * ☐ Email ☐ Phone

Opt In for Texting: - Name Selected - *

Email: name@company.com

Email2: name2@company.com

Work Phone: (xxx) xxx-xxxx ext. Enter digits for 'US' or type + for international numbers.

Home Phone: (xxx) xxx-xxxx ext. Enter digits for 'US' or type + for international numbers.

Cell Phone: (xxx) xxx-xxxx ext. Enter digits for 'US' or type + for international numbers.

Other Phone: (xxx) xxx-xxxx ext. Enter digits for 'US' or type + for international numbers.

Fax: (xxx) xxx-xxxx ext. Enter digits for 'US' or type + for international numbers.

Address

Company Name:

DEA:

Street: * Begin typing address to pull up list:

City: *

Mailing Address

Mailing Street1:

Mailing Street2:

Mailing City:

Mailing State:

Mailing Postal:

Save Changes **Cancel**

9 Select the contacts role.

Please Note: Please include 'Bill To' if the location is escrow billed by the lender.

Click "Save Changes" to continue.

PRISCATECH
Return to Dashboard

Schedule: 000 -0009 - 11534 N 128th PI

Select the magnifying glass to Create a New Contact

Contact: * John, Testing

Contact Type: Location Contact

Role: *

☐ Property Manager ☐ Lender ☐ Additional Interest ☐ Land Contract

☐ Owner ☐ Additional Insured ☐ Loss Payee ☐ Bill To

Save Changes **Cancel**

Property Detail Updates

10 You should see the contact listed on the page, select "New Location Schedule" Contact again if needing to add multiple contacts.

Click "Edit Location Schedule" to modify property details such as deductibles, occupancy status, coverage amounts and underwriting questions.

E-26 000 - -00001

Schedule: 00 -000003 -

Edit Location Schedule

Click 'Edit Location Schedule' in the top right corner to amend your Location Questionnaire with Change Requests.

You will not be able to navigate back to this page from your Dashboard.

Ensure your changes are completely logged to the Location Schedule prior to exiting.

Location Schedule Contacts

New Location Schedule Contact

Name	Contact Type	Title	Email	Work Phone	Role
	Location Contact				Owner
	Location Contact				Additional Insured, Land Contract
Testing, Jack	Location Contact		Jack@testimg.com	(816) 555-6233	Lender

General Information

Account:

Effective Date:

Expiry Date:

Endorsement Type:

07/01/2026

07/01/2027

Endorsement

Address Information

Map

11 Navigate through the questionnaire and update any details needed.

Click "Save Changes" when completed.

Schedule: 00

-000003 -

Save Changes

Type *

Multi Family

Number of Units *

3

Does the client own all units in the complex?

☐ Yes
 ☒ No

Square Feet ⓘ

2,750

Override Square Feet?

None Selected

Construction Type:

None Selected

Status *

Vacant

Number of Stories *

1.0

Year Built *

1920

Year Roof:

1920

Year Electric:

1920

Year Plumbing:

1920

Year HVAC:

1920

Property Coverage

*

Yes

Coverage Form (Cause) *

Basic

Note: Basic coverage does not include Water or Theft Coverage.

Click [HERE](#) to see the full list of covered perils.

Named Windstorm ⓘ +

Included

Ordinance or Law ⓘ

☐

Deductible (AOP) *

2,500

Valuation Type: *

RCV

Building Limit: *

332,150.00

Contents Limit: *

0.00

12

Once completed, this will be sent to your CSA for review. They will reach out with any additional questions and to finalize the change.

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Return to Dashboard

E-26-000 -0003-1-
Schedule: 00 -000003 - !

Edit Location Schedule

☒ Thank you for your request. This has been sent to your CSA for review and processing. Please reach out to your CSA with any questions.

Instructions

Click 'Edit Location Schedule' in the top right corner to amend your Location Questionnaire with Change Requests.
You will not be able to navigate back to this page from your Dashboard.
Ensure your changes are completely logged to the Location Schedule prior to exiting.

Location Schedule Contacts ⓘ [+ New Location Schedule Contact](#)

Name	Contact Type	Title	Email	Work Phone	Role
	Location Contact				Owner
	Location Contact				Additional Insured, Land Contract
Testing Jack	Location Contact		Jack@testing.com	(816) 555-6233	Lender

General Information

Account:

Effective Date: 07/01/2026

Expiry Date: 07/01/2027

Endorsement Type: Endorsement