

Getting Endorsement MI From Whitespace

This is a guide on how to extract basic Endorsement information for MI purposes. Note this document only covers how to get common data points. If it does not cover what you are after specifically, please reach out to the Integrations team who can provide further guidance.

Getting a List of Endorsements

The first API call you want to make is the **POST /summary** call:

https://swagger.whitespace.co.uk/#/Summary/post_api_summary.

This call returns a list of the most recently updated risks that you can access. For this scenario, use the filter payload so that the call only returns risks with endorsements.

So, for example, you might use a payload of:

```
{  
  "statuses": [  
    "Endorsement"  
    "EndorsementFinalised"  
  ]  
}
```

The status of **“Endorsement”** applies to endorsements that have been completed by the broker, and **“EndorsementFinalised”** to those that are signed and awaiting completion. Depending on your needs, you may feature one, several, or all of the endorsement statuses as listed below.

Unless otherwise modified, the call returns the 60 most recently changed risks matching the filter, in this instance those with the specified endorsements on them. If you need more than those risks, you should repeat the call to page through the filtered list using the **last** / **from** query string parameters as documented in the swagger page.

Obtaining Basic Information

Each risk has a **“docs”** array, which contains relevant documents, including the MRC data for the different risk stages, line info, chats etc.

You should search the risks’ **“docs”** array for items with a **“type”** of **“RWPlacing”** and a **“status”** matching your desired endorsement stages:

- “Endorsement” – Completed endorsements
- ”EndorsementFinalised” – Signed endorsements awaiting completion
- “EndorsementPending” – Shown endorsements awaiting signing
- ”EndorsementInPreparation” – Draft endorsements not yet shown

See below for an example of an RWPlacing document for an endorsement would look:

```

{
  "channels": [
    "akhil_ALL",
    "tomyunderwriting_ALL"
  ],
  "createdAt": "2024-08-12 09:56:03",
  "createdInVersion": 21900,
  "endorsementNumber": "1",
  "id": "ICD77B5FD4-0790-42B9-BC53-65242FB96558::SIGNED::EN1",
  "insuredName": "231233",
  "isFacility": true,
  "isVertical": false,
  "lastModifiedBy": "MU9FCFC64E-7694-420A-BE61-2ABEDB3E8F52",
  "limitSummary": "",
  "lineItemCount": 6,
  "originalDocID": "ICD77B5FD4-0790-42B9-BC53-65242FB96558::SIGNED",
  "placementType": "FullContract",
  "placingBrokerChannel": "akhil_ALL",
  "rev": "4-7de5ad6401899adce7da68d8c816137b",
  "status": "Endorsement",
  "type": "RWPlacing",
  "umr": "B132432352",
  "updatedAt": "2025-02-11 15:03:05"
},

```

The key fields of interest are typically the “id” (The Whitespace identifier for this endorsement”), the “endorsementNumber” specifying this particular endorsement’s position in the list of endorsements on the risk, the “placingBrokerChannel” identifying the user and team placing the endorsement, and the “umr” uniquely identifying the risk. Additionally, if the endorsement is a mid-term participant change, there will be an additional field called “endorsementType” with a value of “mtpc”. This field is not otherwise included.

Performing this analysis for each risk returned in the /summary call will now give you a list of endorsements as well as some basic information about them.

Obtaining Agreement Information

The information returned by the filtered **POST /summary** call includes basic details about agreements. Search the “docs” array for items with the “type” of “RWEndorsementFollower” and an “id” matching that of the specific endorsement you are retrieving information for. Any and all agreeing carriers on that endorsement are recorded in these items.

The example below is one of the RWEndorsementFollower documents for the endorsement shown above, “id”: “ICD77B5FD4-0790-42B9-BC53-65242FB96558::SIGNED::EN1”.

```
{
  "agreed": true,
  "agreedAt": "2025-02-11 15:03:05",
  "id": "ICD7785FD4-0790-4289-BC53-65242FB96558::SIGNED::EN1::ENF::tomyunderwriting_ALL",
  "lastUpdatedAt": "2025-02-11 15:03:05",
  "role": "notifyParty",
  "type": "RWEndorsementFollower",
  "uwrChannel": "tomyunderwriting_ALL"
},
```

Note that the **RWEndorsementFollower** document has an “**id**” that consists of the endorsement’s “**id**” followed by “**::ENF::**{**companyID_teamID**”}, where **companyID** and **teamID** identify the carrier that the **RWEndorsementFollower** document is for.

As you can see above, the information in the **RWEndorsementFollower** document includes the fact that the carrier has agreed, the time and date of the agreement, and the carrier’s agreement role.

For more detailed information about a carrier’s agreement, pass the “**endorsementID**” in a GET call to **/api/risks/{riskID}/endorsementFollowers**:

https://swagger.whitespace.co.uk/#/Risks/get_api_risks__riskID__endorsementFollowers

This will give you additional information, such as the exact date of agreement and if this was an mtpc endorsement, details of the mid-term participant change agreement. Obviously, this call must be performed separately for each individual endorsement.

Obtaining Detailed Information

Once you have the list of endorsements that you are interested in, you can go deeper for more detailed information about their contents. You can use the **GET /v23.09/data** call to extract any tagged data (‘Defined Data’) from them:

https://swagger.whitespace.co.uk/#/Data/get_api_v23_09_data__riskID__

Alternatively, the full MRC information can be obtained with a **GET /risks/{riskID}** call:

https://swagger.whitespace.co.uk/#/Risks/get_api_risks__riskID__

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