

Agent Portal Key Features

Access Policy Documents

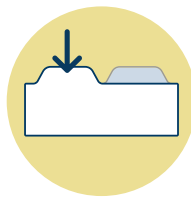
Recent policy activity is available on the Recent Policy Documents tile of the Agent Portal homepage.

Access your in-force policy documents at any time by navigating to Inforce/Future Policies under the Policy Information tab, selecting your policy and choosing **More Policy Details**. Save or email a pdf of your policy, endorsements and auto ID cards.

You can sign up for portal or email alerts to receive a notification when billing or policy activity occurs. This feature will let alert you when a new policy is issued, endorsements are made or you have a new notice of cancellation or rescission. To turn on your policy or billing notification preferences refer to the [Notification Quick Card](#).



Login to Agent Portal to view tools



Find information under the Policy Information tab



Sign up for email alerts

Obtain Loss Runs

You can always obtain loss runs for an individual policy, or for all policies for a client, by selecting an insured name under Inforce/Future Policies and choosing either **Policy Loss Runs** or **Client Loss Runs**.

Submit a Claim

Reporting a claim is easy through Agent Portal. Simply select the policy for which you need to report a claim under Inforce/Future Policies and choose **Submit A Claim**. A fillable form will pop-up with pre-populated policy information.



Select the policy you need to report a claim



A fillable form will pop-up pre-populated

Request an Endorsement

Submit basic endorsement requests by selecting the Services tile from the homepage and choosing **Email Us – Endorsement Requests**. Basic requests include adding, removing or amending mortgagees, loss payees, and lien holders; changes to billing plans; correction requests; mailing changes; adding or deleting vehicles, and more.

*Additional Insured Note: The General Liability Broadening Endorsement provides automatic AI coverage for contractual obligations including primary and non-contributory wording and waiver of subrogation where required.



Select Services tile on homepage



Choose Email Us - Endorsement Request

View Billing & Payment Information

Check your account billing details when you choose **View Billing Info** for a selected policy under Inforce/Future Policies. From here you can view balances and projected installment & commission schedule. You can also email a billing representative directly or Go to MyBilling*.

You can view...



Balances



Projected Installment



Commission Schedule

Download Common Forms and Questionnaires

Find common policy forms like frequently request broadening endorsements along with supplemental questionnaires needed to submit a complete application by selecting **Applications, Questionnaires and Forms** under Doing Business with Us.



Download supplemental questionnaires

