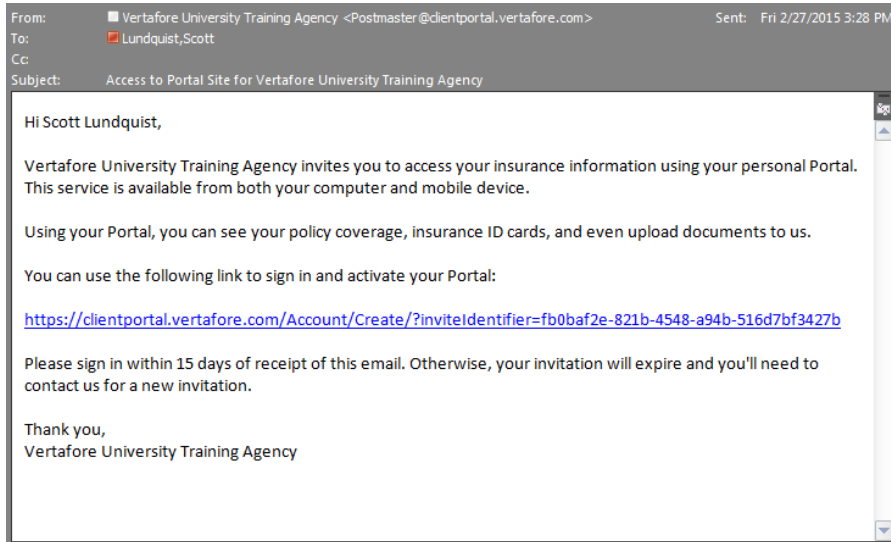


Using the Portal

We are happy to provide you with access to your insurance information anytime via the web. By now you should have received an invitation email with information to activate your Portal account. The email looks similar to the one below:



Use the link in the email to open and activate your account for the Portal. If you haven't received the email* or you didn't activate the account within 15 days of receiving the email, contact us for a new account activation email.

**If you haven't received the email in your Inbox, check your Junk email folder.*

You can access the Portal on your desktop computer, smart phone, or tablet providing you with flexibility. The Portal contains tabs of information that include an Overview, Policies, Auto ID Cards, Claims, Documents, and Certificates.

What you see may differ depending on your permissions.

The Overview tab displays your Quick Links, announcements from your agency, recent documents, and a list of your agency contacts.



The policies tab displays all of your current and future policies. Each policy includes the policy number, the type of business (such as Homeowners or Private Passenger), and the policy term, an icon for the insurance company providing the coverage, and a View Summary link, a link to a pdf file, or a Not yet available notation.

MY ACCOUNT ▾ GALACTICA CARDS ▾ MY TEAM ▾

OVERVIEW **POLICIES** AUTO ID CLAIMS DOCUMENTS CERTIFICATES ☰

↑↓

	# BOI457514 Boiler & Machinery CA Equipment	11/1/2016 - 11/1/2017 CURRENT		ACORD Form...
	# BOP COMMERCIAL LINE BOP Oregon Antique & Gift Shop	9/9/2016 - 9/30/2017 CURRENT		View Summary
	# COMMERCIAL INLAND... Commercial Articles	9/9/2016 - 9/9/2022 CURRENT	AMS Insurance Company	View Summary

Click the **View Summary** link to see the details of the policy similar to the following example:

POLICY NUMBER: PA 123002

Basic Policy Information

Named Insured		Transaction Information	
Name:	Smith, John	Term:	9/18/2014 - 9/18/2017
Address:	4000 2nd St Bothell, WA 98011	Date:	1/23/2015
Residence:	(987) 654-3210	Type:	PCH
Cell:	(123) 456-7890	Description:	delete veh, add veh
Email:	sss@gmail.com	Company:	ABC Company1

Personal Auto

Drivers

Driver Name:	DOB	Licensed State	Relationship
Regular Customer smith barbie	10/12/1963	WA	Insured



Vehicles

Vehicle:	Limit 1	Limit 2	Deductible Type/Amount	Stated Amount
0001 0002 2010 CHEVROLET CAMARO SS/CAMARO SS 2 Door hardtop VIN: NYGARAGED				
Coverage				
Bodily injury limit(s)	100000	300000		
Vehicle: 0002 0002 2014 Ford F150 Pickup truck VIN: 1FORDPICKUPDTRUCK2222				
Coverage				
Bodily injury limit(s)	100000	300000		

To request a change to the policy do the following:

1. Click the policy in the grid.
2. When the Policy Summary page loads, scroll to the bottom of the page and click **Request a Change**.

POLICY SUMMARY [< BACK TO LIST](#)

 **General Liability # GL4654654646**
Effective Dates: 7/21/2015 - 7/21/2017 **CURRENT** [SafeCo Preferred](#)  [View Summary](#)
Named Insured: **Galactica Cards**

Liability Coverage Type: **Commercial General Liability**
Coverage Basis: **Occurrence**

Do you want to make a change to your policy?

If you'd like to request any changes to your policy, please give us as much information as possible and we'll contact you to verify details.

[REQUEST A CHANGE](#)

3. On the Request Policy Change window, enter the change you'd like to make. Whether it's to add/remove a driver or increase/decrease coverage limits. Complete the other information and when you're finished click **Submit**.

Policy Change Request ✕

Please provide as much information as possible about the policy change you are requesting.

Your agent may wish to contact you to gather more details. Please provide the following:

Phone Number	Ext.	Email Address
<input type="text" value="() -"/>	<input type="text"/>	<input type="text" value=""/>

Best Time of Day to Reach You


Day Evening

Other Details or Comments

A follow up is sent to our agency.

The change request date and status appear on the Policy Summary page. A member of our staff will process the change and let you know when it's done.

POLICY SUMMARY [< BACK TO LIST](#)

 **General Liability # GL4654654646**
Effective Dates: 7/21/2015 - 7/21/2017 **CURRENT** [SafeCo Preferred](#) [View Summary](#)
Named Insured: **Galactica Cards**

Liability Coverage Type: **Commercial General Liability**
Coverage Basis: **Occurrence**


Do you want to make a change to your policy?
If you'd like to request any changes to your policy, please give us as much information as possible and we'll contact you to verify details.

PENDING: 7/28/2015 test change request

[REQUEST A CHANGE](#)

Your current auto policies are examined for vehicles insured on the policy. When a vehicle is found it appears on the Auto ID tab. On this tab you can view, download, email, and print an Auto ID card for a policy.



Being able to view online is handy if you need your Auto ID card, but don't have it with you. You can use your smart phone or tablet to access the Portal and produce an electronic copy of your card.



MY ACCOUNT ▾ GALACTICA CARDS ▾ MYTEAM ▾

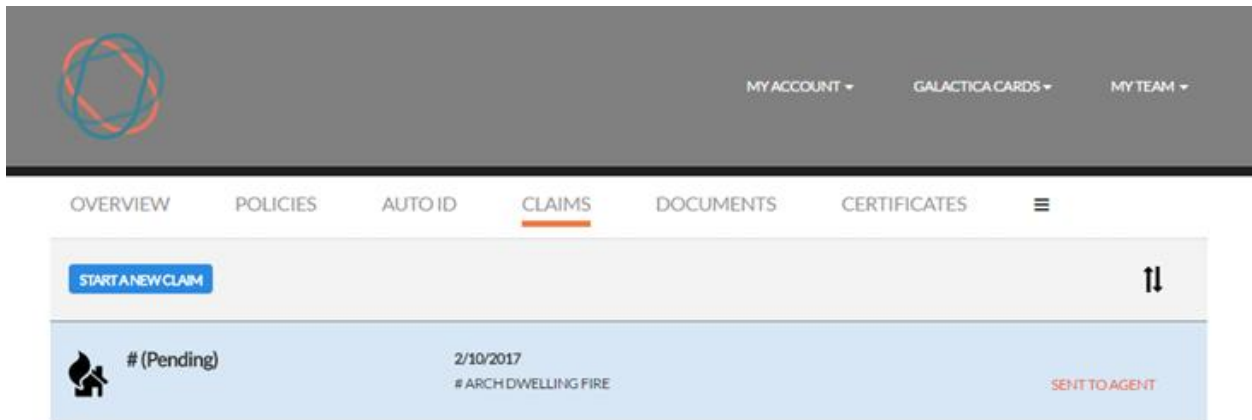
OVERVIEW POLICIES **AUTO ID** CLAIMS DOCUMENTS CERTIFICATES ≡

Search by year, make, model, VIN, or policy # 🔍 ⌵

 2008 Chrysler 300 VIN # AZ	10/4/2016 - 10/4/2017 # ARCH AUTO 4515	Galactica Cards	ACTIONS ▾ View Download Email
 2005 Ford F150 VIN # AR	10/4/2016 - 10/4/2017 # ARCH AUTO 4515	Galactica Cards	

On this tab you can view claims entered by our agency as well as submit a claim.

Based on your permissions you may or may not be able to enter a new claim.



Do the following to submit a claim:

1. On the Claims tab click **Start a New Claim**.
2. The first thing you need to do is choose the policy for which you are filing the claim.

A screenshot of a modal window titled 'Start a New Claim'. The modal has a dark grey header with the title and a close button. The main content area is white and contains the text: 'Please provide the following information. Your agent will follow up with you when the claim is received.' Below this text is a section titled 'Policy' with a dropdown menu. The dropdown menu is currently open and shows the text 'Please choose...' and a downward arrow icon.

3. Complete the fields on the Claim form. Some selections you choose from a list while others you type in the information.

Start a New Claim ✕

Please provide the following information. Your agent will follow up with you when the claim is received.

Policy

Homeowners #APHYD0120 ▼

Date of Loss

08/12/2015 📅

Time of Loss

: **AM**

Does Loss Involve Injury to a Person?

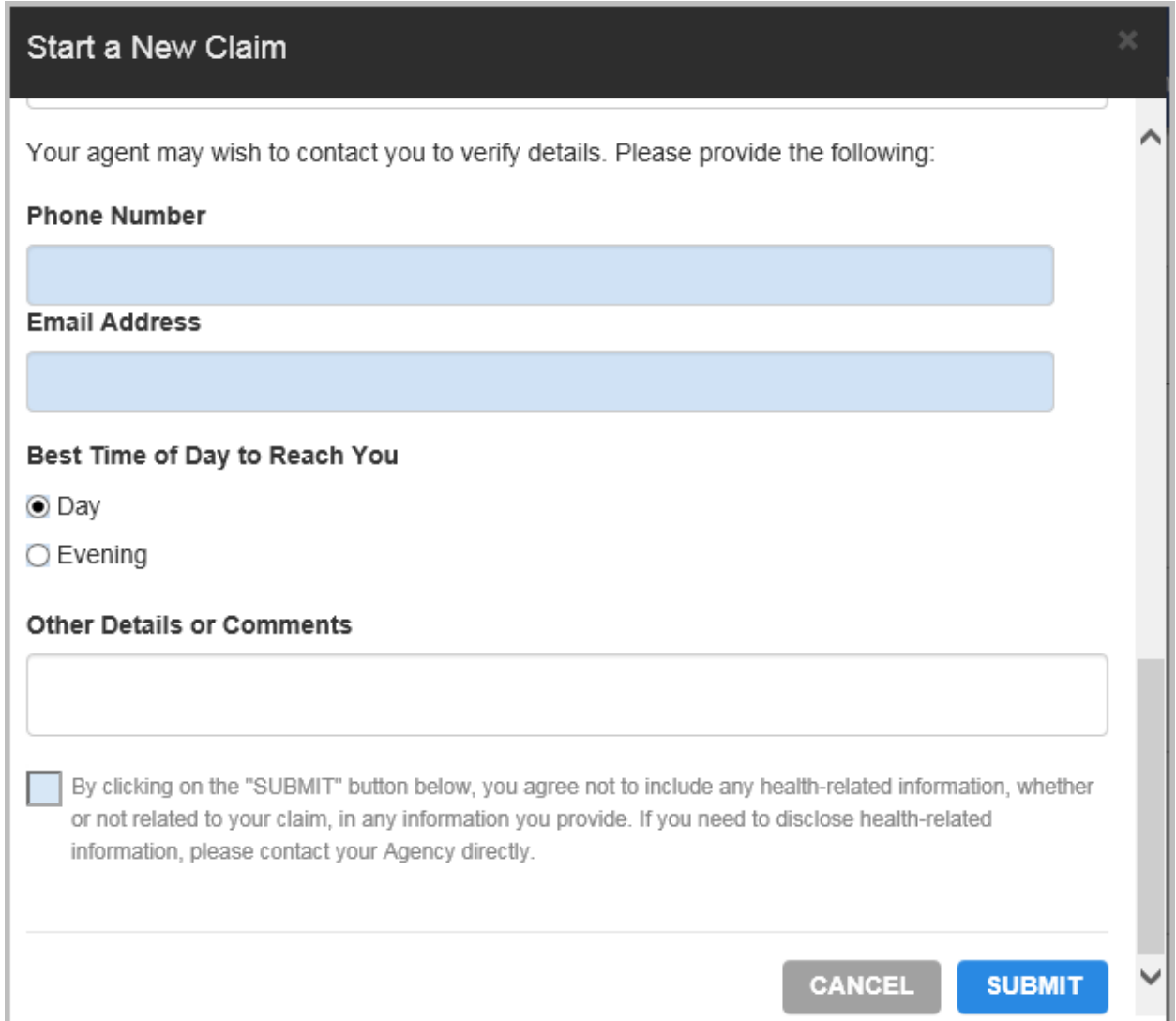
Yes No

Location of Loss

Cause of Loss

▼

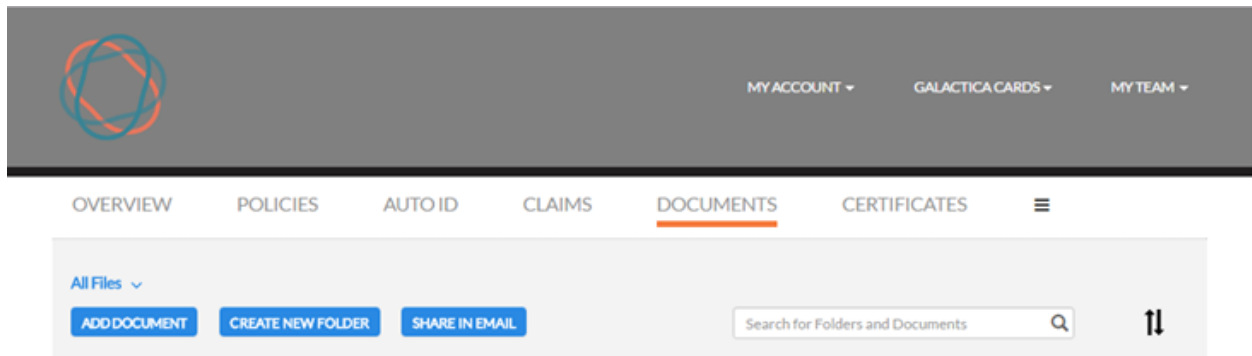
4. When you have finished entering all the information, click **Submit**.



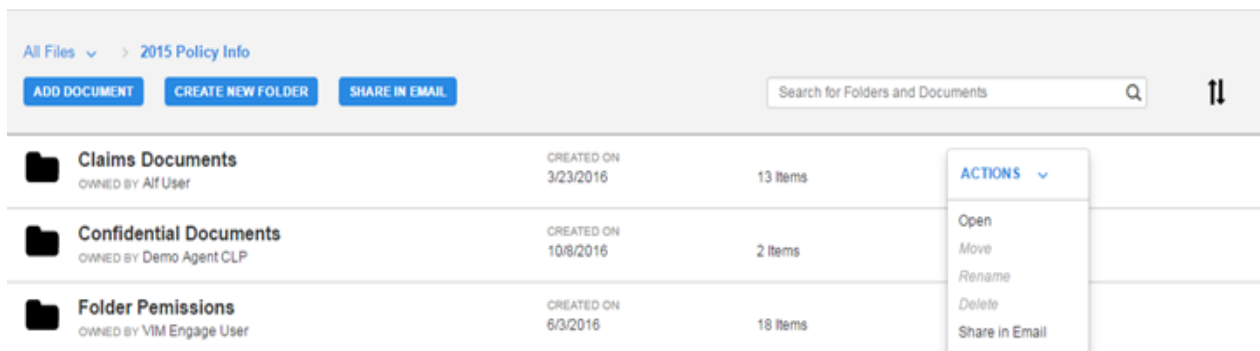
The screenshot shows a web form titled "Start a New Claim" with a close button (X) in the top right corner. Below the title, there is a message: "Your agent may wish to contact you to verify details. Please provide the following:". The form contains several sections: "Phone Number" with a light blue input field; "Email Address" with a light blue input field; "Best Time of Day to Reach You" with two radio button options: "Day" (selected) and "Evening"; "Other Details or Comments" with a large empty text area; and a checkbox with the text: "By clicking on the 'SUBMIT' button below, you agree not to include any health-related information, whether or not related to your claim, in any information you provide. If you need to disclose health-related information, please contact your Agency directly." At the bottom right, there are two buttons: "CANCEL" (grey) and "SUBMIT" (blue). A vertical scrollbar is visible on the right side of the form.

5. After entering the claim you'll see the claim you've entered with a status of Pending and a notation of Sent to Agent.
6. When your claim has been reviewed by our staff, the status changes to Open.

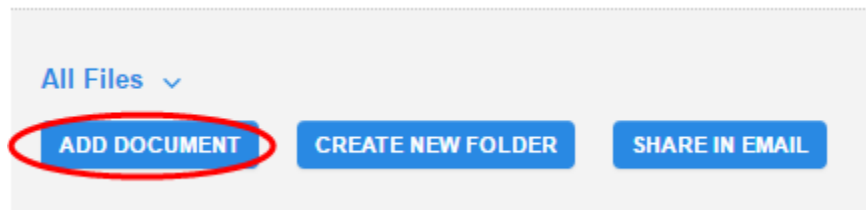
On the Documents tab you'll see documents we have shared with you as well as any you have uploaded to the Portal. The documents are stored in a secure encrypted form.



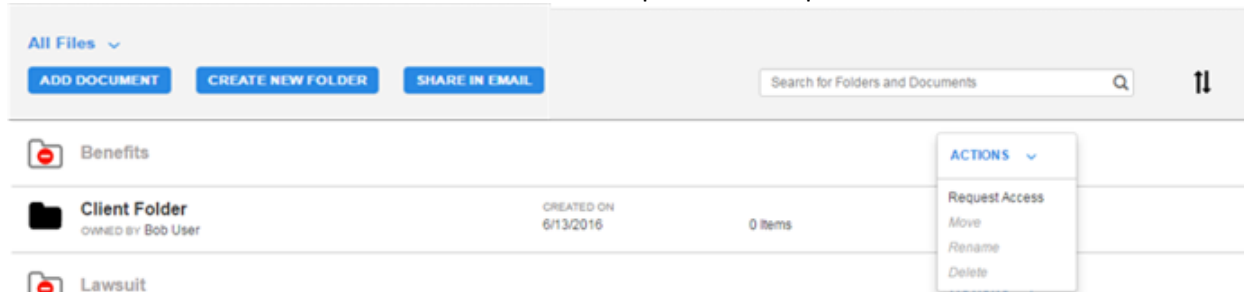
Use the Actions drop-down to open, move, rename, delete, or Share a link to the document in an email.



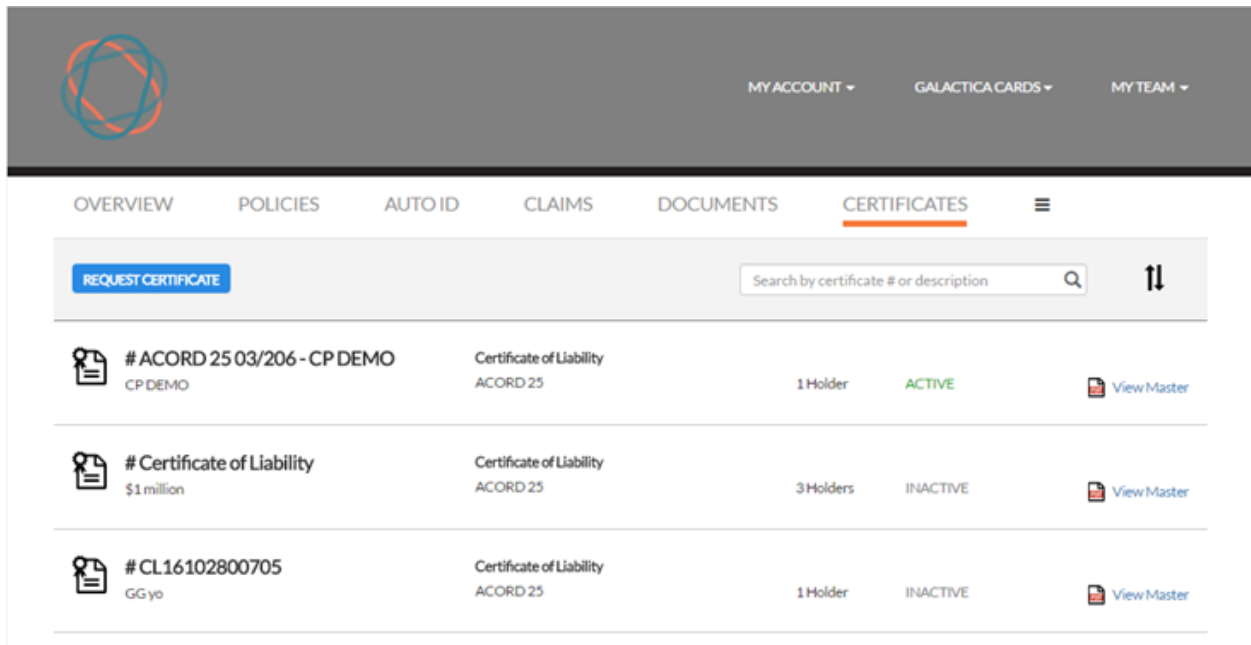
To add a document, click **Add Document** above the document list.



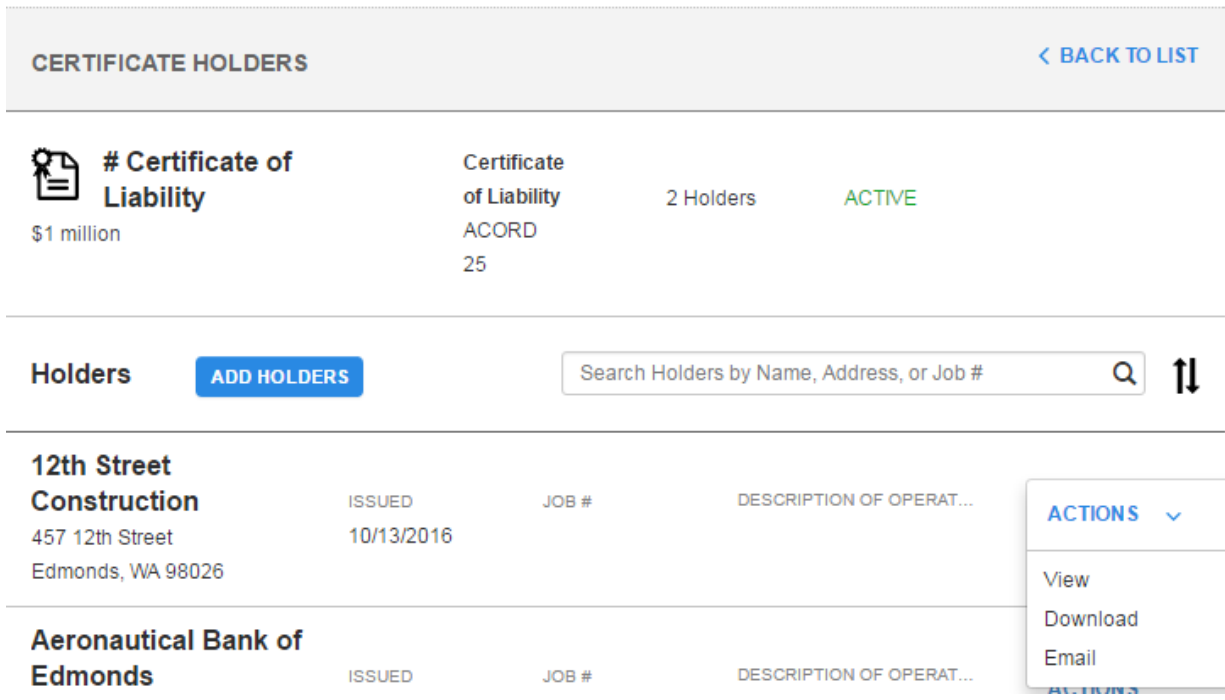
Some folders may require you to have certain permissions in order to access their contents. These folders will be marked restricted. Use the Actions drop-down to request access to the folder.



If you have commercial lines policies with us and you use certificates you may see the certificates tab. The certificates in the list are called Master Certificates because they contain all the information that may be required by multiple certificate holders.

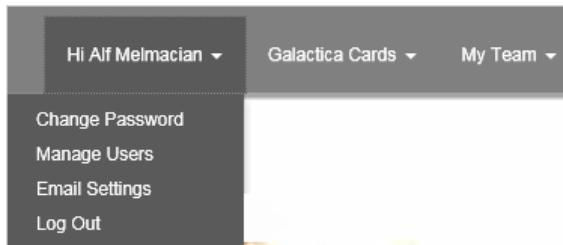


When you click a certificate in the grid, another web page opens showing all the current certificate holders. You can print an existing certificate, request a certificate for a new holder, or email a certificate.

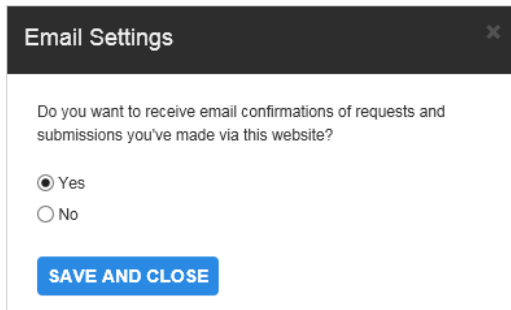


The Header includes important menus.

Hi (username)



Here is where you can Change your Password, Manage Users, change your Email Settings, and Log Out. The Manage Users option allows you to add users who will have access to your Portal. When you click **Manage Users** you will see a list of Contacts that we've entered for your account. If you don't see the name and email you're looking for, contact our office and ask us to add the contact and email address. The Email Settings selection allows you to opt out of email confirmations for requests and submissions you've made on the web site.



My Team

The information listed is the people in our agency responsible for your account. With this information so convenient, you can easily contact us if needed.

