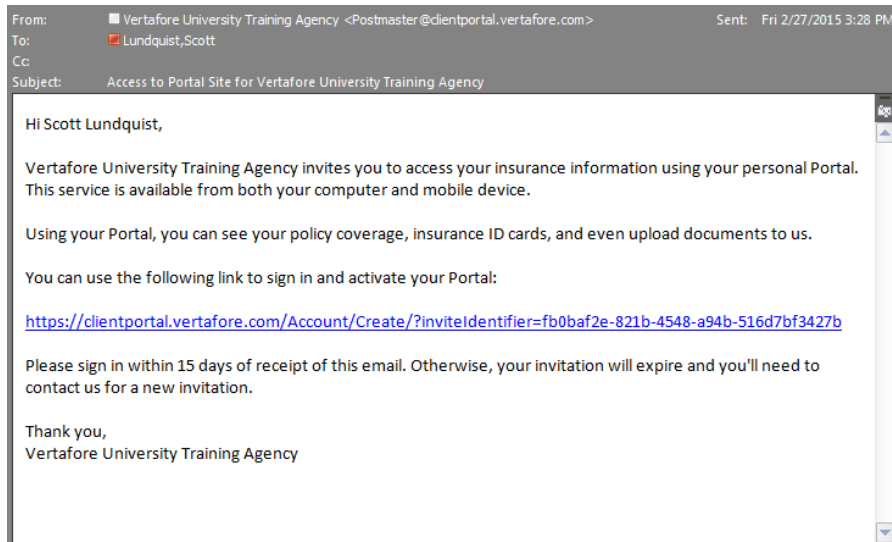


Using InsurLink

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.

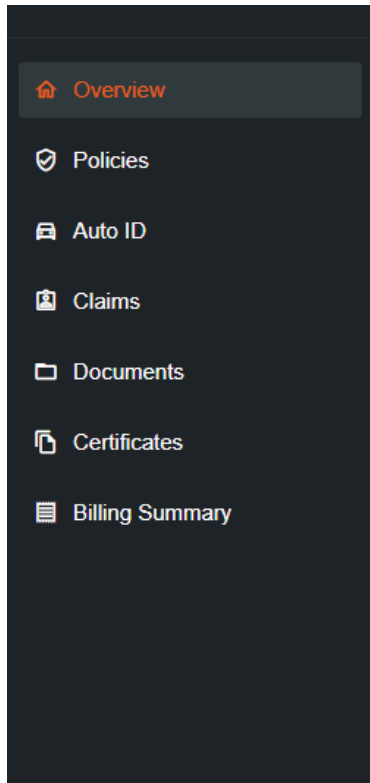
**If you have not received the email in your Inbox, check your Junk email folder.*

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.

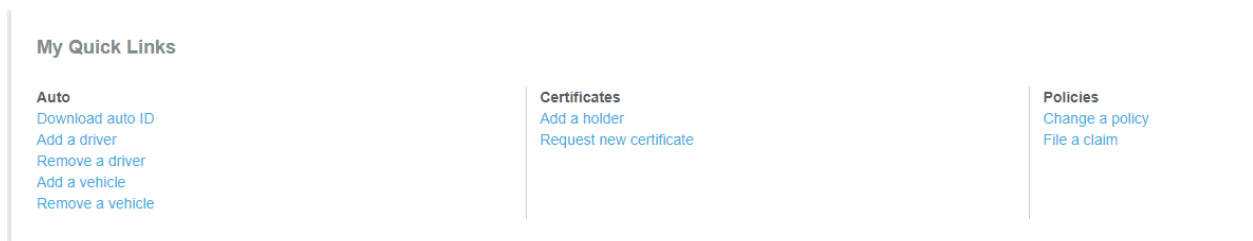
What you see may differ depending on your permissions.

Overview Tab

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



You can also access any of the functions from within the tabs in the Quick Links section. This includes functions such as adding drivers to a policy, submitting a claim, downloading an auto ID, and more.



Policies Tab

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.

# TRUCKERS Truckers	11/14/2019 - Continuous CURRENT	120251 1 (29793)	View Summary
# GARAGE AND DEALERS Garage & Dealers	11/14/2019 - Continuous CURRENT	120251 1 (29793)	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:	0001 0002 2010 CHEVROLET CAMARO SS/CAMARO SS 2 Door hardtop VIN: NYGARAGED			
Coverage	Limit 1	Limit 2	Deductible Type/Amount	Stated Amount
Bodily injury limit(s)	100000	300000		

Vehicle:	0002 0002 2014 Ford F150 Pickup truck VIN: 1FORDPICKUPTRUCK2222			
Coverage	Limit 1	Limit 2	Deductible Type/Amount	Stated Amount
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**.

Additional Coverages

No coverages are available to show. Please view your full policy document for all coverages, or contact your agent for details.

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

- 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**.

A follow up is sent to your 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.

Vehicles Insured
 Number of vehicles on this policy: 2
[Download vehicle list \(.csv\)](#)


Veh #	Cust Veh #	Year/Make/Model	VIN	Comp	Coll
00001	00001	2012 12 123	43212341	\$100	-- PENDING: 6/24/2019 Remove vehicle request sent
00002	00002	--	--	\$123	-- REMOVE VEHICLE

[ADD A VEHICLE](#)

Auto ID Tab

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.

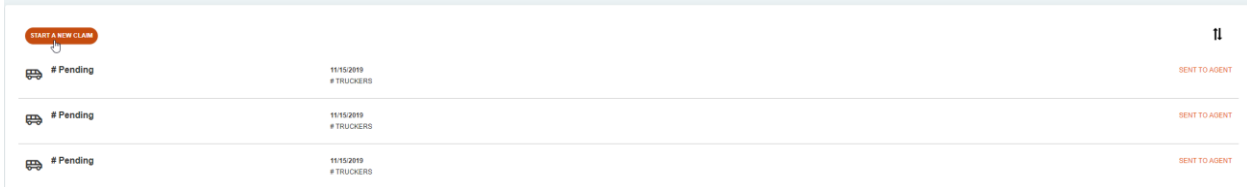
Being able to view online is handy if you need your Auto ID card, but don't have it with you. You can use your smart phone or tablet to access the Portal and produce an electronic copy of your card.

 1996 Honda Accord VIN # 123457890	1/4/2019 - 1/4/2020 # 123457890-45	ad/road Dia	ACTIONS View Download Email
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Claims Tab

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

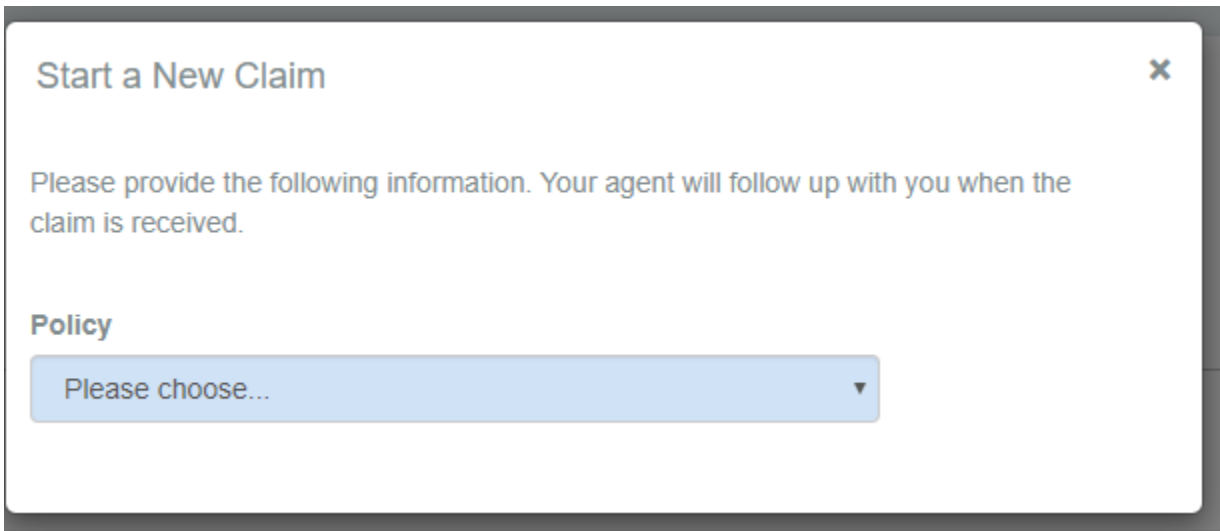
Based on your permissions you may or may not be able to enter a new claim.



START A NEW CLAIM			11
# Pending	11-15-2019 # TRUCKERS	SENT TO AGENT	
# Pending	11-15-2019 # TRUCKERS	SENT TO AGENT	
# Pending	11-15-2019 # TRUCKERS	SENT TO AGENT	

Do the following to submit a claim:

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



Start a New Claim ✕

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

Policy


Please choose... ▼


1. 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
Commercial Auto #TEST COMM AUTO 2 ▼

Date of Loss
12/18/2019 

Time of Loss
:  AM

Does Loss Involve Injury to a Person?
 Yes No

Location of Loss

Cause of Loss

Who was contacted (police, fire department, etc.)?

Please provide a report, ticket, or case number

Please describe the Loss

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

Phone Number	Email Address
Cell: (555) 555-5555 ▼	alf@clp.com ▼

Other Details or Comments

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

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

Phone Number

Cell: (555) 555-5555

Email Address

alf@clp.com

Other Details or Comments

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.

CANCEL

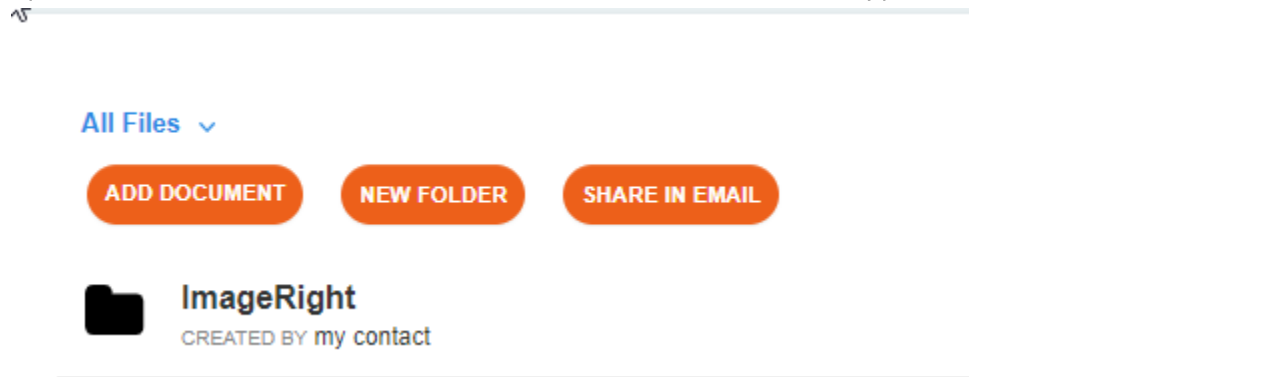
SUBMIT

3. After submitting the claim, you'll see the claim you've entered with a status of Pending and a notation of Sent to Agent.
4. When an agent reviews and enters the claim in the management system, the status will change to Open. They can then continue to change the status as they work through the claim.
5. Once the agent closes the claim, the status will change to Closed.

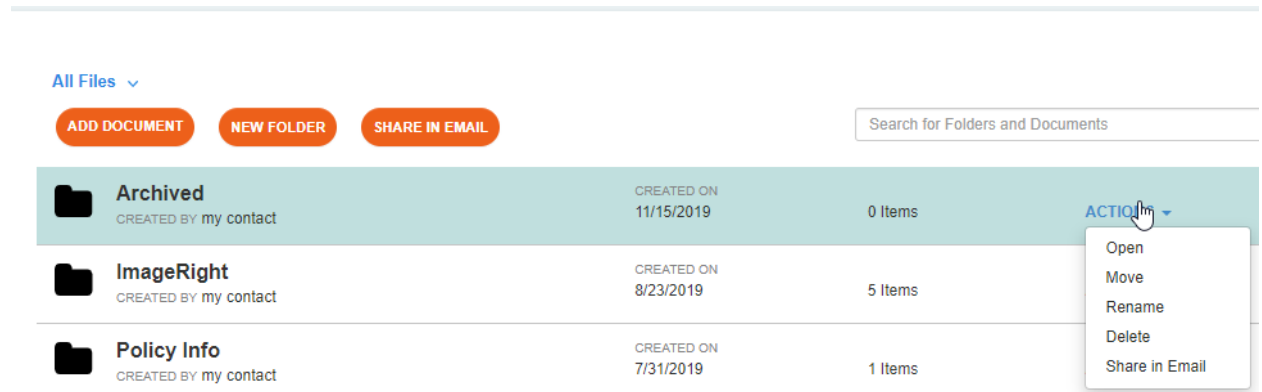
***Note:** If you submit more than one claim on the same policy, you will receive a notification that you've already submitted a claim for that policy. You can still choose to submit the new claim, but a warning message will appear first*

Documents Tab

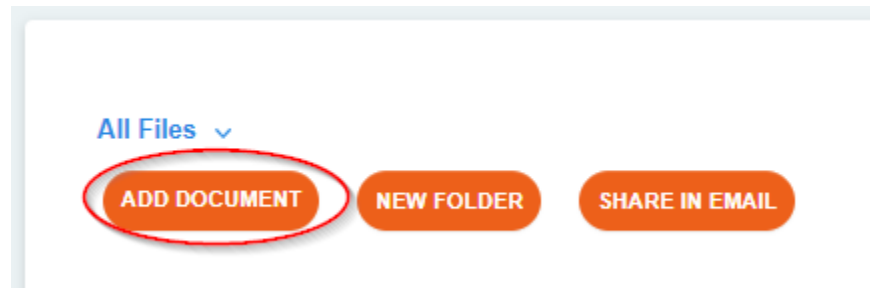
On the Documents tab you will see documents we have shared with you as well as any you have uploaded to the Portal. The documents are stored in a secure encrypted form.



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

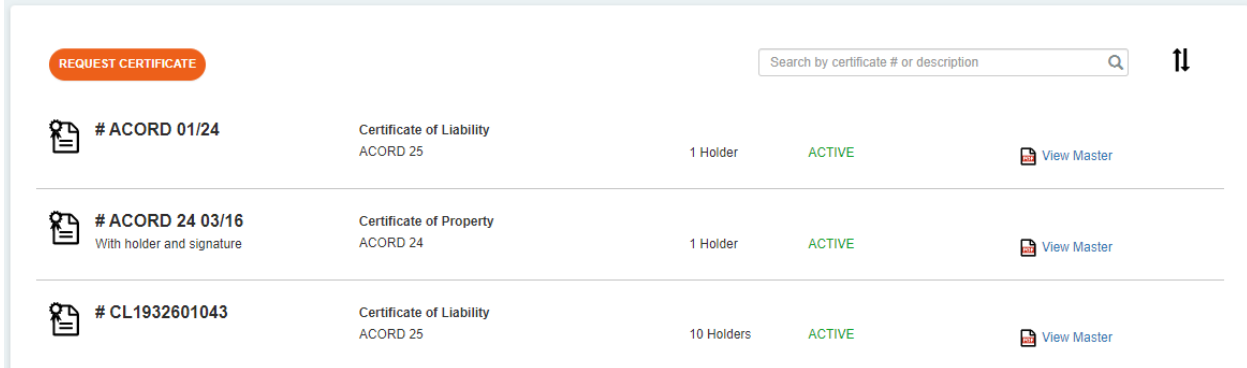








To add a document, click Add Document above the document list.



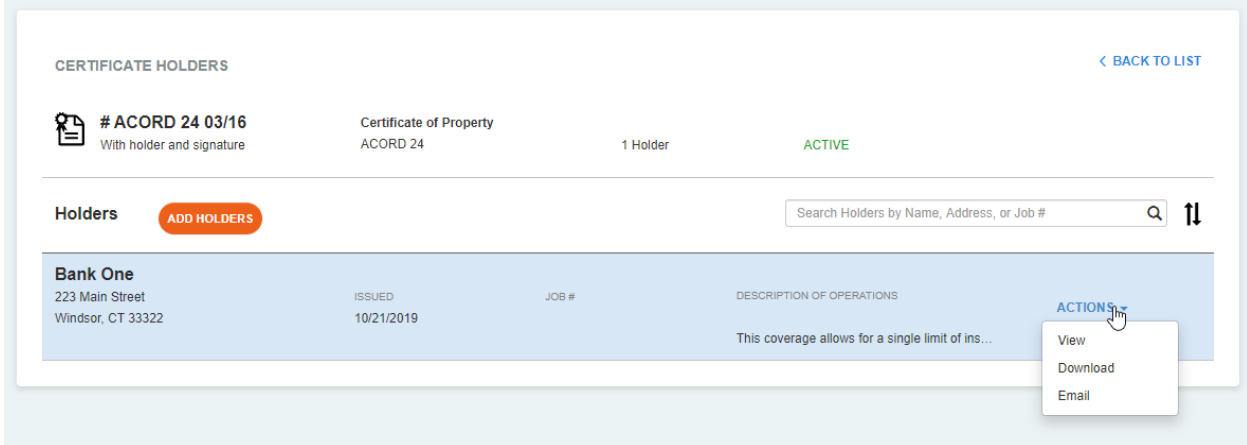
Certificates Tab


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.



REQUEST CERTIFICATE		Search by certificate # or description		
 # ACORD 01/24	Certificate of Liability ACORD 25	1 Holder	ACTIVE	 View Master
 # ACORD 24 03/16 With holder and signature	Certificate of Property ACORD 24	1 Holder	ACTIVE	 View Master
 # CL1932601043	Certificate of Liability ACORD 25	10 Holders	ACTIVE	 View Master

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.




CERTIFICATE HOLDERS				← BACK TO LIST
 # ACORD 24 03/16 With holder and signature	Certificate of Property ACORD 24	1 Holder	ACTIVE	
Holders		ADD HOLDERS		Search Holders by Name, Address, or Job #
Bank One 223 Main Street Windsor, CT 33322	ISSUED 10/21/2019	JOB #	DESCRIPTION OF OPERATIONS This coverage allows for a single limit of ins...	ACTIONS View Download Email


If you have been given permission to add holders, you will be able to add holders directly to a Certificate by clicking the "Add Holders" button. You will then be prompted to fill in the necessary information (required fields are in blue):

Add Holders x

Holder 1

Choose from list or start typing a name. ▼

Holder Information	Certificate Details
Name <input type="text"/>	Job Type <input type="text"/>
<input type="text"/>	Job Number <input type="text"/>
Address <input type="text"/>	Project End Date <input type="text" value="mm/dd/yyyy"/> 
<input type="text"/>	Description of Operations <input checked="" type="checkbox"/> Same as Master
City <input type="text"/>	<input type="text"/>
State/Province <input type="text" value="Choose..."/> ▼	Additional Information or Remarks <input type="text"/>
Postal Code <input type="text"/>	
Contact <input type="text"/>	Comments for Your Agent <input type="text"/>
Method of Distribution <input type="text" value="Choose..."/> ▼	
Fax <input type="text" value="() - - - -"/> Ext. <input type="text"/>	
Email <input type="text"/>	



Once you add the holder, they will immediately add to the list of holders on that certificate. You can then download or view the sub-cert immediately.

Billing Summary Tab

This is where you can see a summary of all open invoices on your account. You will always see your open account balance on the top left, and then you can filter by any date range to see invoices within that time period.

Account Summary

ACCOUNT BALANCE ⓘ
\$5,709.00

Please note that recent payments may not be reflected in the Account Balance or the Open Agency Bill Invoices list. These will update as soon as your agency processes your payment.

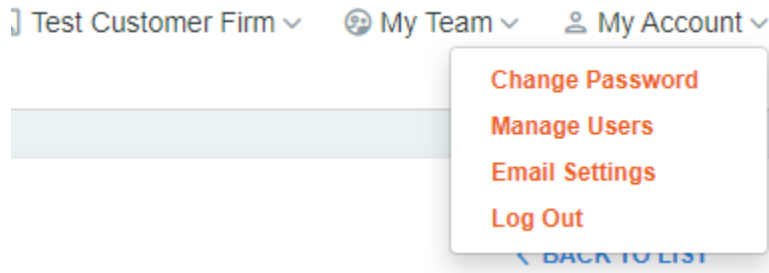
Open Agency Bill Invoices

INVOICE DATE	DUE DATE	POLICY #	POLICY TYPE	INVOICE #	BALANCE
8/8/2020	7/23/2020	ALLAMERICANCOMMERCIAL	Business Auto	1330	\$1,000.00
7/8/2020	7/23/2020	ALLAMERICANCOMMERCIAL	Business Auto	1329	\$1,000.00
6/1/2020	7/23/2020	ALLAMERICANCOMMERCIAL	Business Auto	1328	\$1,000.00
5/3/2020	6/23/2020	TRUCKERS	Truckers	1324	\$1.00
8/3/2020	6/19/2020	TRUCKERS	Truckers	1327	\$205.00
7/3/2020	5/19/2020	TRUCKERS	Truckers	1326	\$209.00
11/11/2019	5/8/2020	HO 6789900	Homeowners	1316	\$964.00

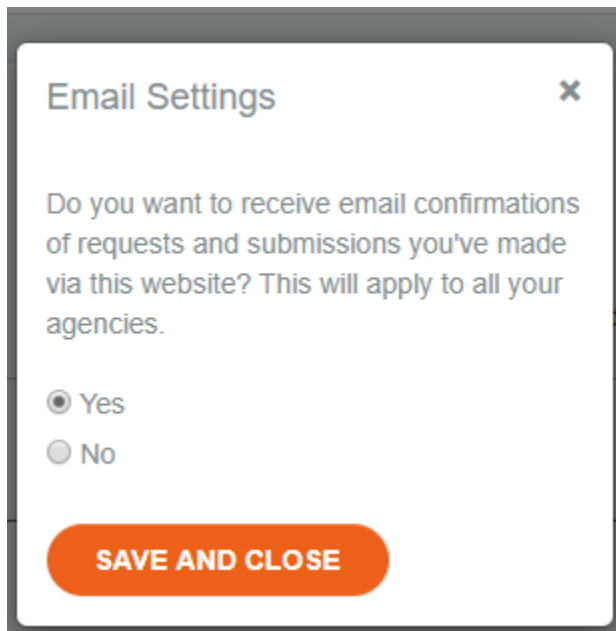
Header

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.

