



YOUR HANDY GUIDE TO
DOCUMENTS ON THE
BROKER PORTAL



DISTINGUISHED
SELF-SERVICE

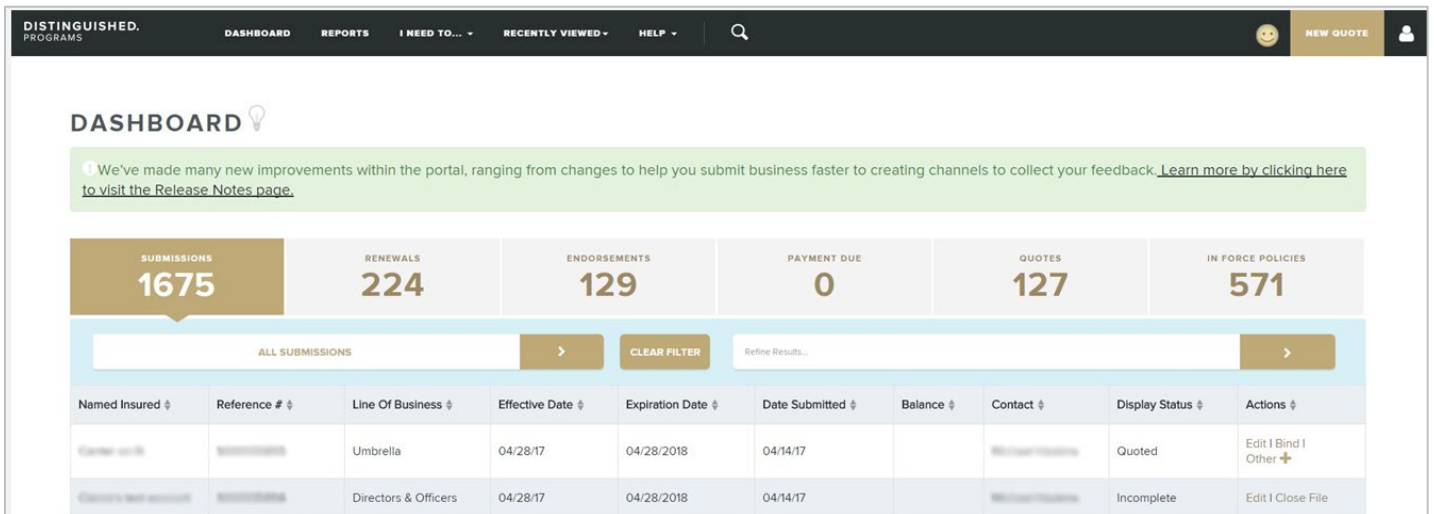
Document Retrieval

Through the Broker Portal, you can view and save documents associated with your account(s). Open an account, click “All Documents” and you’ll find documents related to that account. Follow the steps below to locate your policy and all associated documents.

You will find the following types of documents within the portal:

- Policies
- Invoices
- Quotes
- Completed Applications
- Cancellation Notices
- Rescission Notices

1. Go to the **Broker Portal Dashboard**.



DASHBOARD

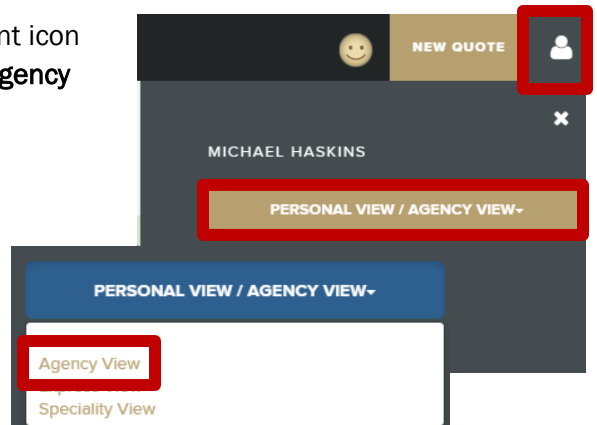
We've made many new improvements within the portal, ranging from changes to help you submit business faster to creating channels to collect your feedback. [Learn more by clicking here to visit the Release Notes page.](#)

SUBMISSIONS	RENEWALS	ENDORSEMENTS	PAYMENT DUE	QUOTES	IN FORCE POLICIES
1675	224	129	0	127	571

ALL SUBMISSIONS CLEAR FILTER Refine Results...

Named Insured	Reference #	Line Of Business	Effective Date	Expiration Date	Date Submitted	Balance	Contact	Display Status	Actions
Company A	123456789	Umbrella	04/28/17	04/28/2018	04/14/17		Michael Haskins	Quoted	Edit Bind Other
Company B	987654321	Directors & Officers	04/28/17	04/28/2018	04/14/17		Michael Haskins	Incomplete	Edit Close File

2. To see all accounts toggle to **Agency View**. From the account icon drop down, click **Personal View / Agency View** and select **Agency View**.



NEW QUOTE

MICHAEL HASKINS

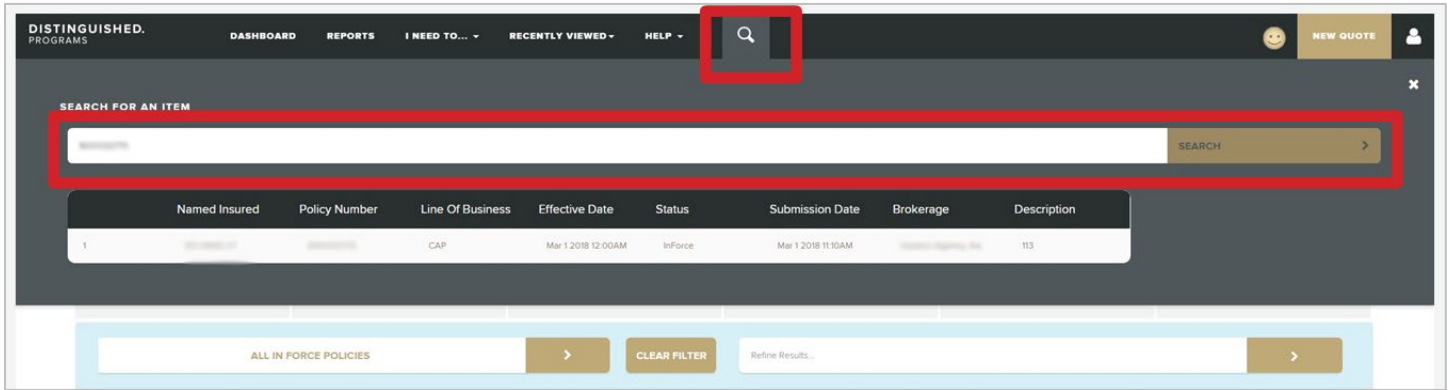
PERSONAL VIEW / AGENCY VIEW-

PERSONAL VIEW / AGENCY VIEW-

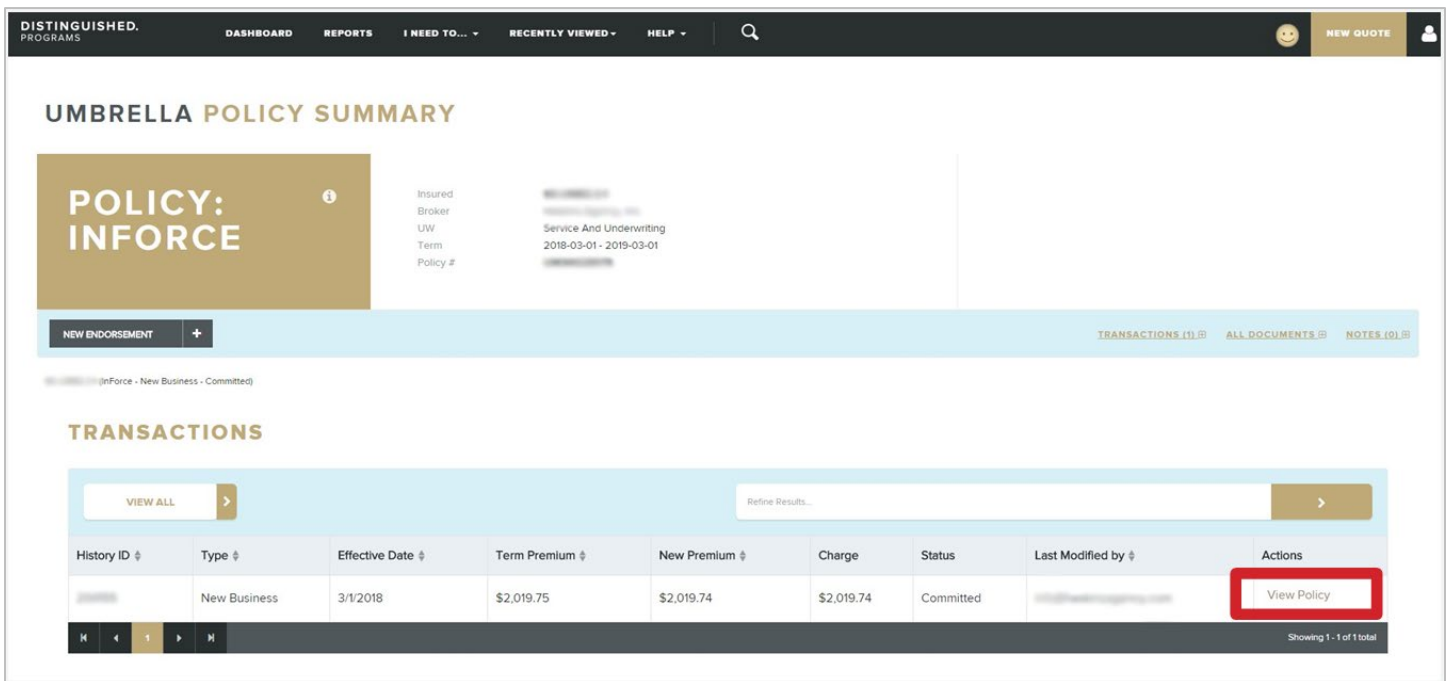
Agency View

Speciality View

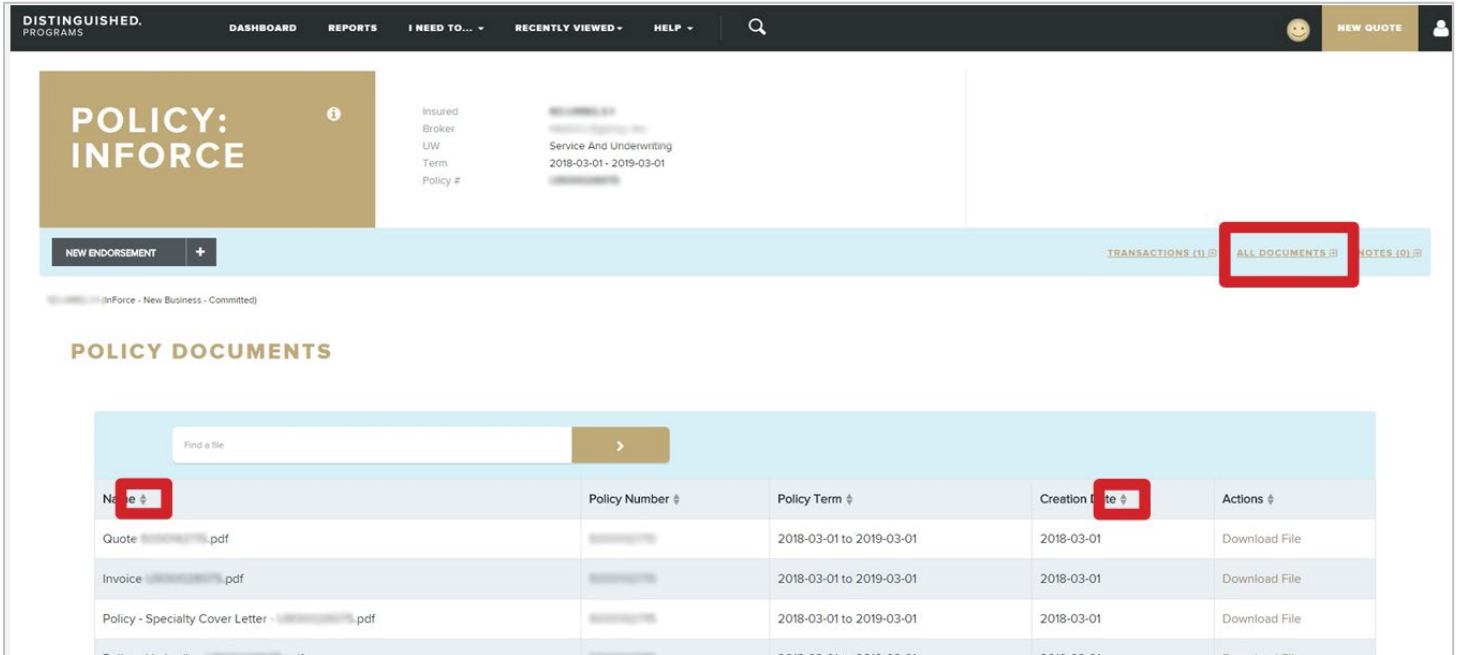
3. Click the magnifying glass to search for your **Submission** or **Policy**.



4. Click **View Policy** to open your submission or policy.



6. Click **All Documents** and sort the list to find what you need.
 - Click the **Creation Date** sort button twice to pull up the most recent date.



POLICY: INFORCE

Insured: [REDACTED]
Broker: [REDACTED]
UW: [REDACTED]
Term: 2018-03-01 - 2019-03-01
Policy #: [REDACTED]

NEW ENDORSEMENT +

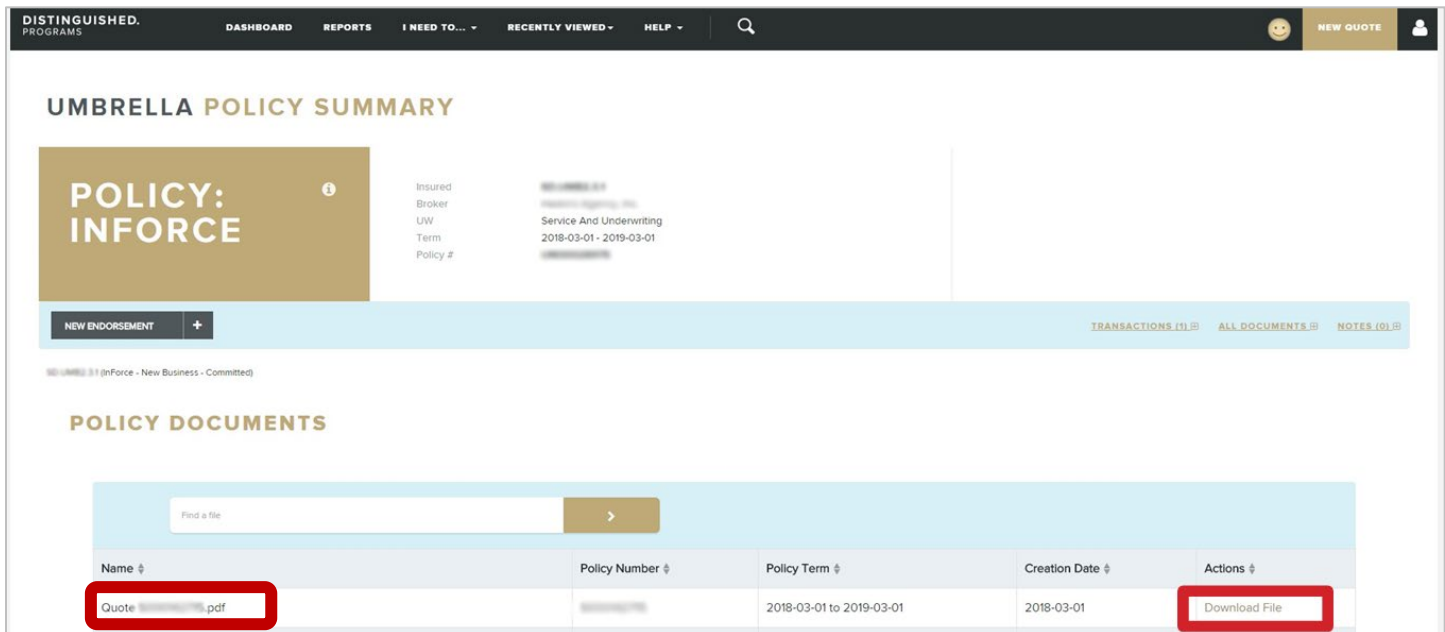
TRANSACTIONS (1) | **ALL DOCUMENTS** | NOTES (0)

POLICY DOCUMENTS

Find a file

Name	Policy Number	Policy Term	Creation Date	Actions
Quote [REDACTED].pdf	[REDACTED]	2018-03-01 to 2019-03-01	2018-03-01	Download File
Invoice [REDACTED].pdf	[REDACTED]	2018-03-01 to 2019-03-01	2018-03-01	Download File
Policy - Specialty Cover Letter [REDACTED].pdf	[REDACTED]	2018-03-01 to 2019-03-01	2018-03-01	Download File

7. Choose your document and click **Download File**.



UMBRELLA POLICY SUMMARY

POLICY: INFORCE

Insured: [REDACTED]
Broker: [REDACTED]
UW: [REDACTED]
Term: 2018-03-01 - 2019-03-01
Policy #: [REDACTED]

NEW ENDORSEMENT +

TRANSACTIONS (1) | ALL DOCUMENTS | NOTES (0)

POLICY DOCUMENTS

Find a file

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