

R&R Insurance Services InsurLink Client User Guide

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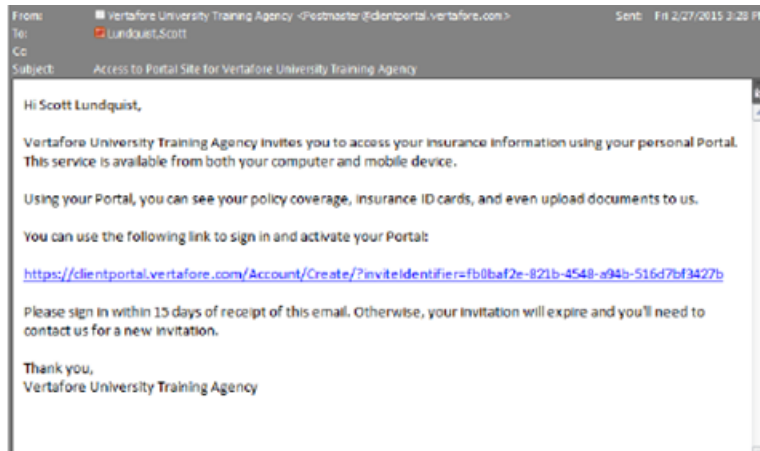
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Document Purpose

The purpose of this document is to provide an InsurLink User Guide for our R&R Insurance Clients.

Using InsurLink

R&R Insurance is 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:





INSURANCE

Use the link in the email to **open and activate** your account for the Portal. If you have not 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.

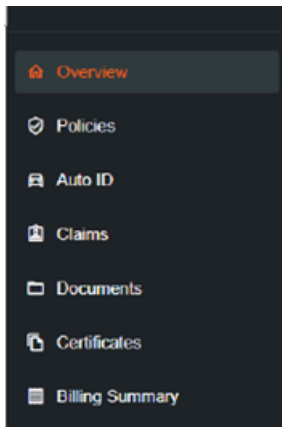
**If you have not received the email in your Inbox, check your Junk email folder.*

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 **My Quick Links** section. This includes functions such as **adding drivers to a policy, submitting a claim, downloading an auto ID, and more.**

My Quick Links

Auto

Download auto ID
Add a driver
Remove a driver
Add a vehicle
Remove a vehicle

Certificates

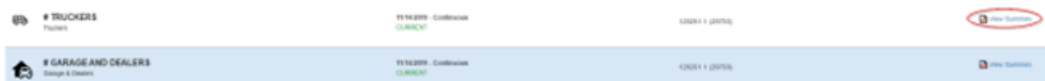
Add a holder
Request new certificate

Policies

Change a policy
File a claim

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.





INSURANCE

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:	3/15/2014 - 3/15/2017
Address:	4000 3rd St Burling, WA 98011	Date:	1/23/2015
Residence:	(987) 654-3210	Type:	POI
Cell:	(123) 456-7890	Description:	delete veh, add veh
Email:	isa@gmail.com	Company:	ABC Company1

Personal Auto

Drivers

Driver Name:	DOB:	Licensed State:	Relationship:
Regular Customer Smith, John	10/12/1960	WA	Insured

Vehicles

Vehicle: 0001 0002 2010 CHEVROLET CAMARO SS/CAMARO SS 2 Door hardtop VIN: N1G4AR6D

Coverage:	Limit 1	Limit 2	Deductible Type/Amount	Stated Amount
bodily injury limit(s)	1,000,000	300,000		

Vehicle: 0002 0002 2014 Ford F150 Pickup truck VIN: 1FORDPCHUPTRUCK2Z22

Coverage:	Limit 1	Limit 2	Deductible Type/Amount	Stated Amount
bodily injury limit(s)	1,000,000	300,000		

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

3. On the **Request Policy Change** window, enter the change you would like to make. Whether it is to **Add/Remove** a driver or **Increase/Decrease** coverage limits. Complete all information and when you are finished click **Submit**.

R&R Insurance receives a follow up.

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 completed.

Vehicles Insured

Number of vehicles on this policy: 2
Download vehicle list (.csv)

Ins #	Cost Ref #	Year/Make/Model	VIN	Comp	Cell
0001	0001	2010 10 100	40012345	\$100	REMOVED: 03/03/15 Remove Vehicle request sent
0002	0002	--	--	\$120	REMOVE REQUEST

ADD A VEHICLE

Auto ID Tab

The **Auto ID Tab** lists all vehicles insured on your policy. 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 do not have it with you. You can use your smart phone or tablet to access the Portal and produce an electronic copy of your card.



INSURANCE



Claims Tab

On the **Claims 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.

Status	Policy	Action
# Pending	XXXXXXXXXX	START NEW CLAIM
# Pending	XXXXXXXXXX	START NEW CLAIM
# Pending	XXXXXXXXXX	START 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.

Start a New Claim



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

Policy

Please choose...

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



INSURANCE

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

12/16/2019

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

Cell: (555) 555-5555

Email Address

alf@clp.com

Other Details or Comments

4. 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

5. After submitting the claim, you will see the claim you have entered with a **status** of **Pending** and a notation of **Sent to Agent**.
6. When an agent reviews and enters the claim in the management system, the **status** will change to **Open**.
7. 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 have already submitted a claim for that policy. You can still choose to submit the new claim, but a warning message will appear first.



INSURANCE

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.

All Files ▾

ADD DOCUMENT

NEW FOLDER

SHARE IN EMAIL

ImageRight
CREATED BY my contact

Use the **Actions Drop-Down** to **open, move, rename, delete or share** a link to the document in an email.

All Files ▾

ADD DOCUMENT

NEW FOLDER

SHARE IN EMAIL

Search for Folders and Documents

Archived CREATED BY my contact	CREATED ON 11/15/2019	0 Items	ACTIONS ▾
ImageRight CREATED BY my contact	CREATED ON 8/23/2019	5 Items	Open Move Rename Delete Share in Email
Policy Info CREATED BY my contact	CREATED ON 7/31/2019	1 Items	

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

All Files ▾

ADD DOCUMENT

NEW FOLDER

SHARE IN EMAIL

Certificates Tab

If you have commercial lines policies and use certificates with us, you may see the **Certificates Tab**. The certificates in the list are **Master Certificates** because they contain all the information 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 06392	ISSUED 10/21/2019	JOB #	DESCRIPTION OF OPERATIONS This coverage allows for a single limit of ins...
			ACTIONS ▾ View Download Email



INSURANCE

If you have permission to add holders, you are able to add holders directly to a Certificate by clicking the **Add Holders** button. The prompt requests you to **fill in** the necessary information (**required fields are in blue**):

Holder 1

Choose from list or start typing a name.

Holder Information

Name

Address

City

State/Province

Postal Code

Contact

Method of Distribution

Fax

Email

Certificate Details

Job Type

Job Number

Project End Date

Description of Operations

Same as Master

Additional Information or Remarks

Comments for Your Agent

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

The **Billing Summary Tab** 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

\$100,049,933.00

SHOWING ACTIVITY DURING

10/24/2019 - 01/22/2020

Transaction Summary

DATE	POLICY #	POLICY TYPE	INVOICE #	DESCRIPTION	BALANCE
11/5/2019	028CAU708	Commercial Automobile	1100002102		\$1,900.00
11/5/2019	102CRIP01	Commercial Property	1100002103		\$2,000.00
11/16/2019	1918ME01181	Retirees/Ret	1100002106		\$300.00

Header

The **Header** includes important menus.

Hi (username)

Test Customer Firm

My Team

My Account

- Change Password
- Manage Users
- Email Settings
- Log Out

BACK TO LIST



INSURANCE

Here is where you can **Change your Password, Manage Users, Change your Email Settings or Log Out**. The **Manage Users** option allows you to add users who have access to your Portal. When you click **Manage Users**, you will see a list of **Contacts** that we have entered for your account. If you do not see the name and email you are 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 have made on the web site.

Email Settings

Do you want to receive email confirmations of requests and submissions you've made via this website? This will apply to all your agencies.

Yes
 No

SAVE AND CLOSE

My Team

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

