R&R Insurance Services
InsurLink Client User Guide

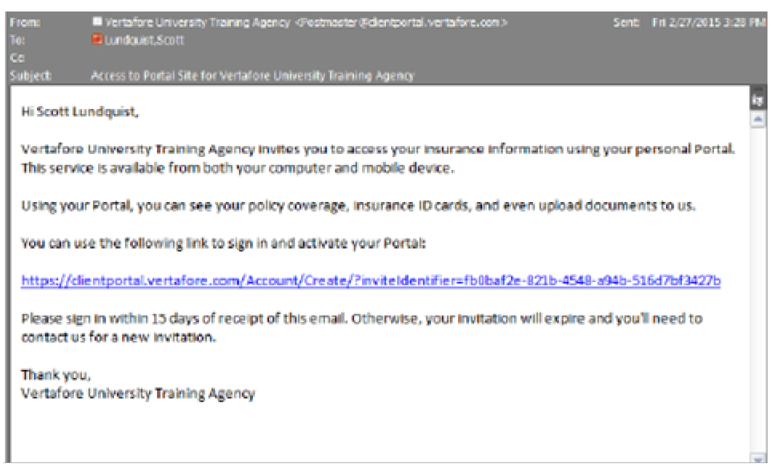
Contents

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:



From: Vertafore University Training Agency <Postmaster@clientportal.vertafore.com> Sent: Fri 2/27/2015 3:28 PM
To: Lundquist,Scott
Cc:
Subject: Access to Portal Site for Vertafore University Training Agency

Hi Scott Lundquist,

Vertafore University Training Agency invites you to access your insurance information using your personal Portal. This service is available from both your computer and mobile device.

Using your Portal, you can see your policy coverage, insurance ID cards, and even upload documents to us.

You can use the following link to sign in and activate your Portal:

https://clientportal.vertafore.com/Account/Create/?inviteIdentifier=fb0baf2e-821b-4548-a94b-516d7bf3427b

Please sign in within 15 days of receipt of this email. Otherwise, your invitation will expire and you'll need to contact us for a new invitation.

Thank you,
Vertafore University Training Agency

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.

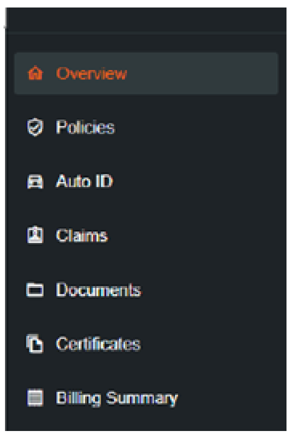
**If you have not received the email in your Inbox, check your Junk email folder.*

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.**

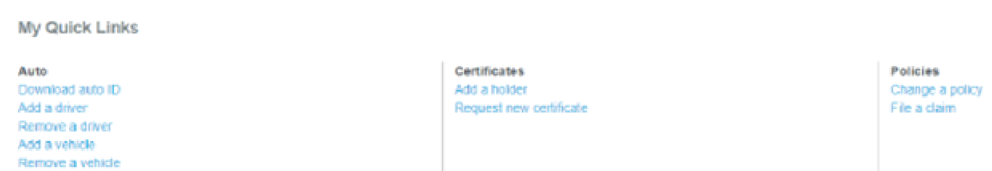
What you see may differ depending on your permissions.

Overview Tab

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

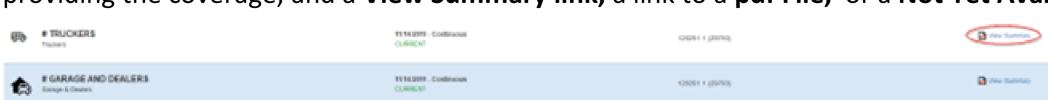


You can also access any of the functions from within the tabs in the **My Quick Links** section. This includes functions such as **adding drivers to a policy, submitting a claim, downloading an auto ID, and more**.



Policies Tab

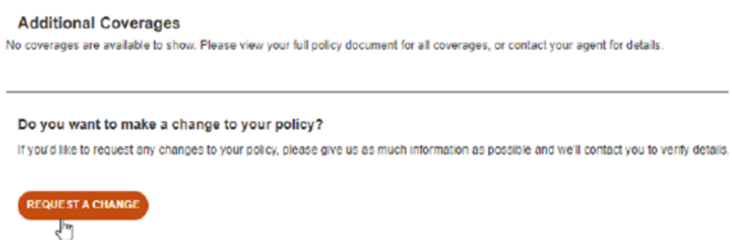
The **Policies Tab** displays all of your current and future policies. Each policy includes the policy number, the type of business (such as Homeowners or Private Passenger), and the policy term, an icon for the insurance company providing the coverage, and a **View Summary link,** a link to a **pdf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



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

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**.



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**.

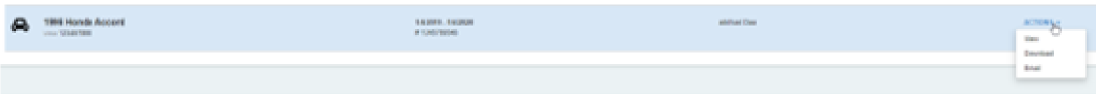
R&R Insurance receives a follow up.

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.

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.

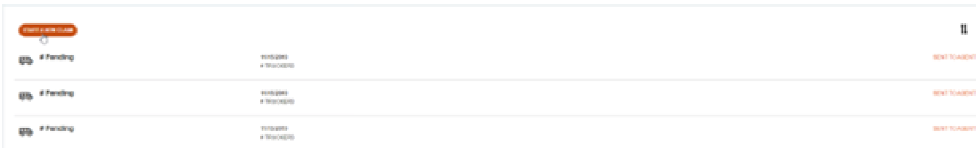
Being able to view online is handy if you need your Auto ID card, but do not have it with you. You can use your smart phone or tablet to access the Portal and produce an electronic copy of your card.



Claims Tab

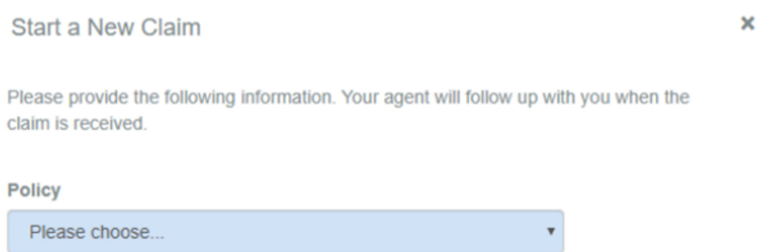
On the **Claims Tab**, you can **view** claims entered by our agency as well as **submit** a claim.

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

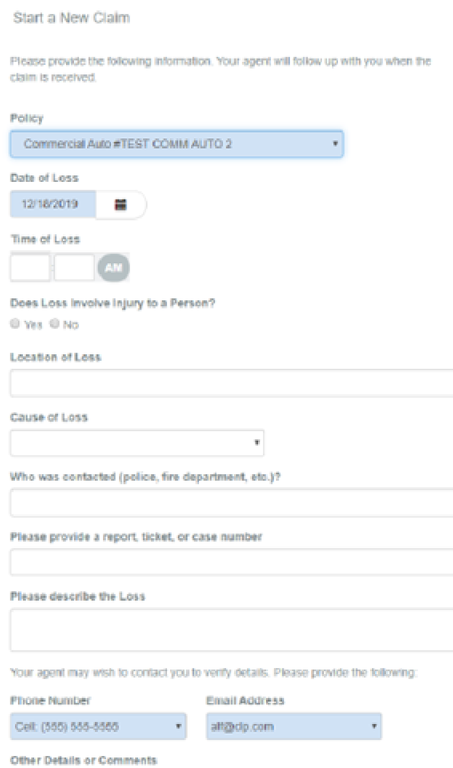


Do the following to submit a claim:

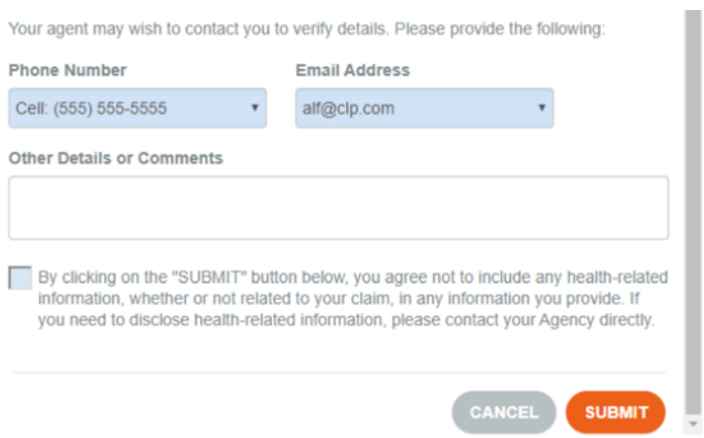
1. On the **Claims Tab** click **Start a New Claim**.
2. The first thing you need to do is choose the policy for which you are filing the claim.



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



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

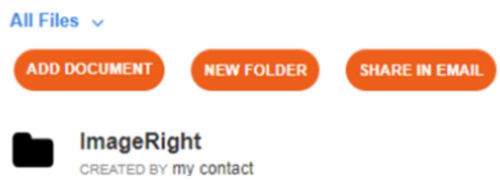


5. After submitting the claim, you will see the claim you have entered with a **status** of **Pending** and a notation of **Sent to Agent**.
6. When an agent reviews and enters the claim in the management system, the **status** will change to **Open**.
7. Once the agent closes the claim, the **status** will change to **Closed**.

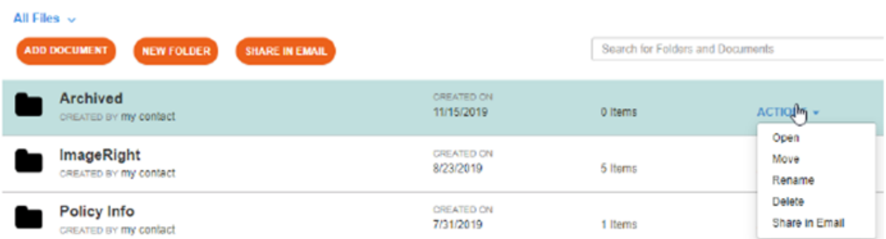
Note: If you submit more than one claim on the same policy, you will receive a notification that you have already submitted a claim for that policy. You can still choose to submit the new claim, but a warning message will appear first.

Documents Tab

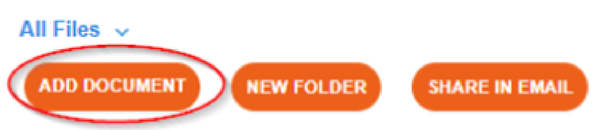
On the Documents tab, you will see documents we have shared with you as well as any you have uploaded to the Portal. The documents are stored in a secure encrypted form.



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

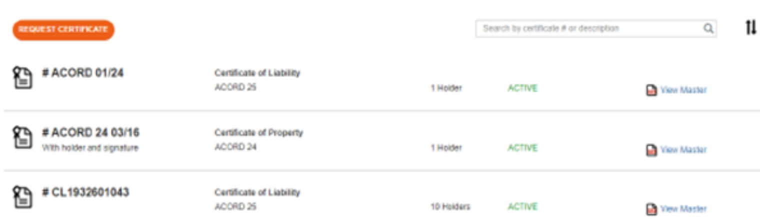


To add a document, click **Add Document** above the document list.

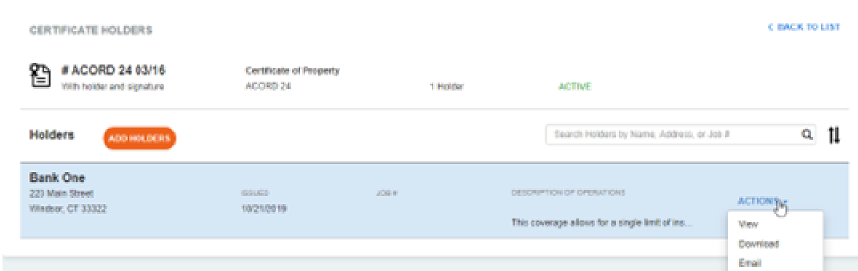


Certificates Tab

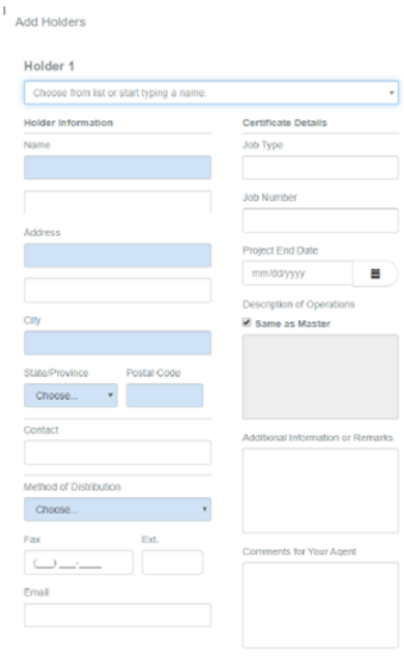
If you have commercial lines policies and use certificates with us, you may see the **Certificates Tab**. The certificates in the list are **Master Certificates** because they contain all the information required by multiple certificate holders.



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.



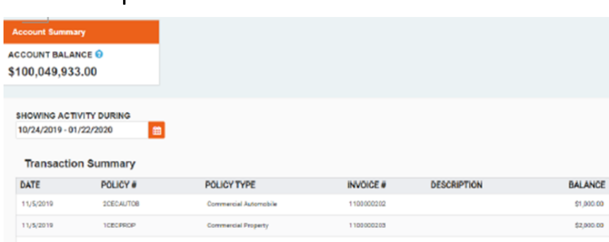
If you have permission to add holders, you are able to add holders directly to a Certificate by clicking the **Add Holders** button. The prompt requests you to **fill in** the necessary information (**required fields are in blue**):



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.

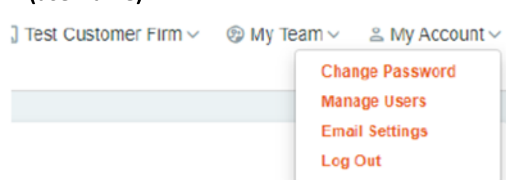
Billing Summary Tab

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.

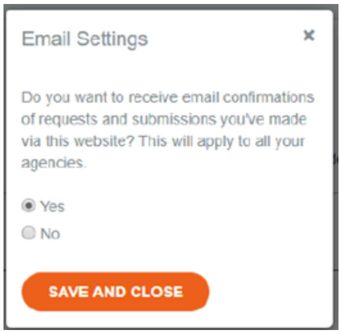


Header

The Header includes important menus.
Hi (username)



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.



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.