Chapter 2

The Client Portal Experience

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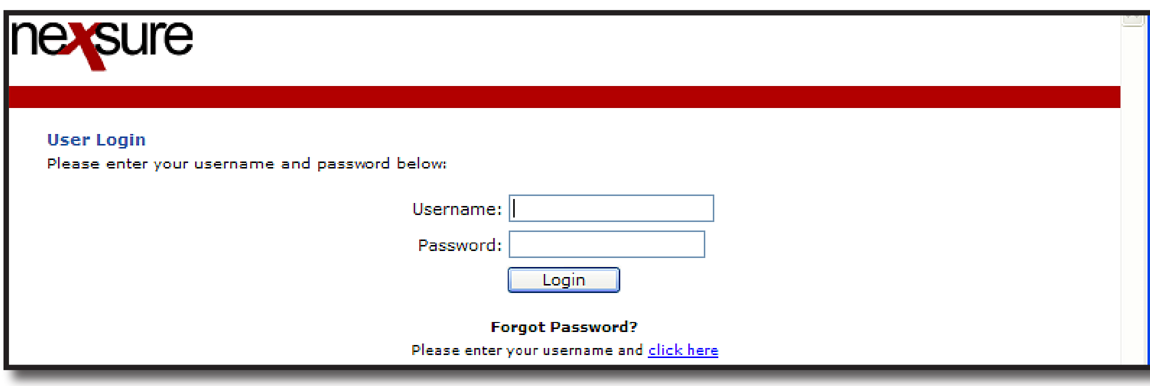
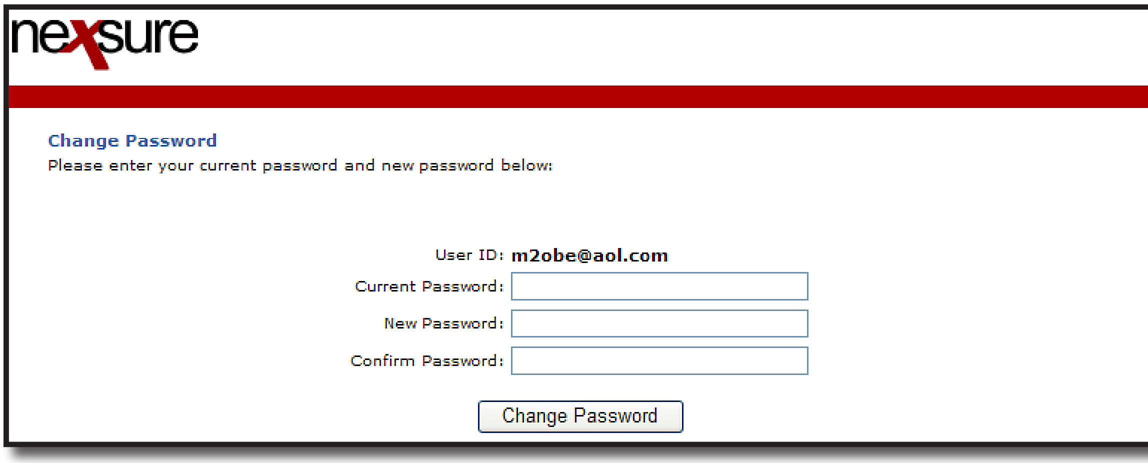
Access to the client portal is granted by adding security to the client's contact in Nexsure. The client's contact receives a system generated email containing the contact's Portal User Login information and the portal URL. The URL link provided in the email displays either the agency's website or the Nexsure portal login as added in the Org setup. For instructions on adding client logins and client portal setup, see "Client Access", Chapter 1.

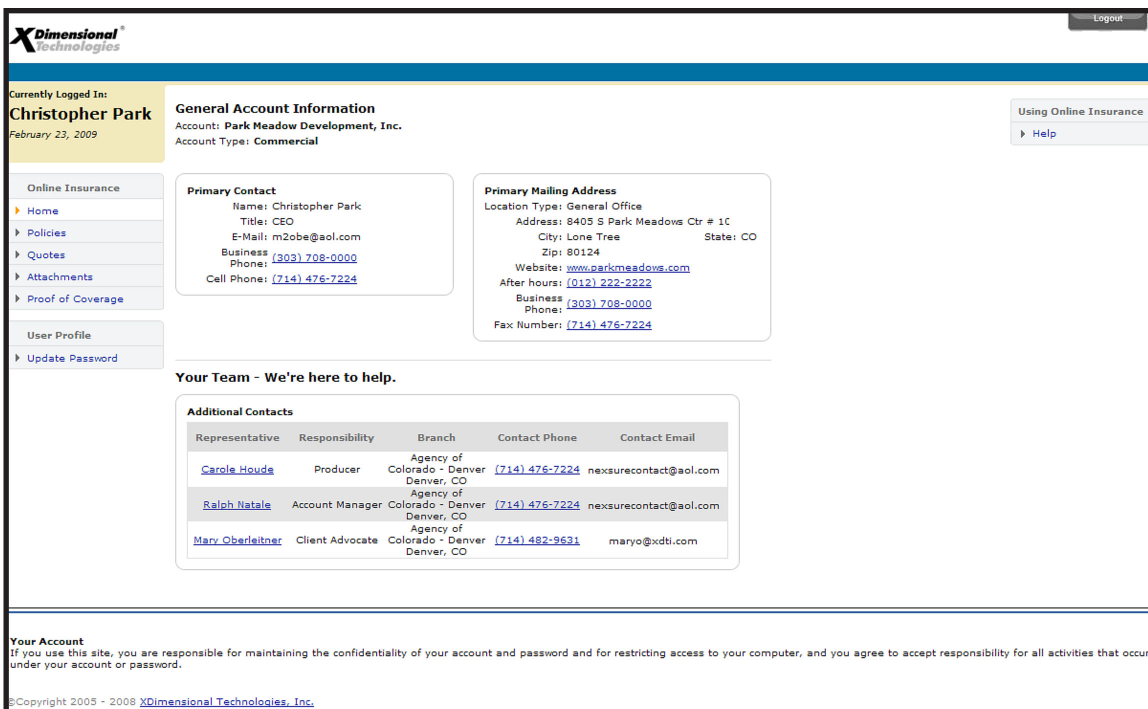
> **Note**: The first email address on the client contact's record is used for client portal user system notifications and must be accurate.



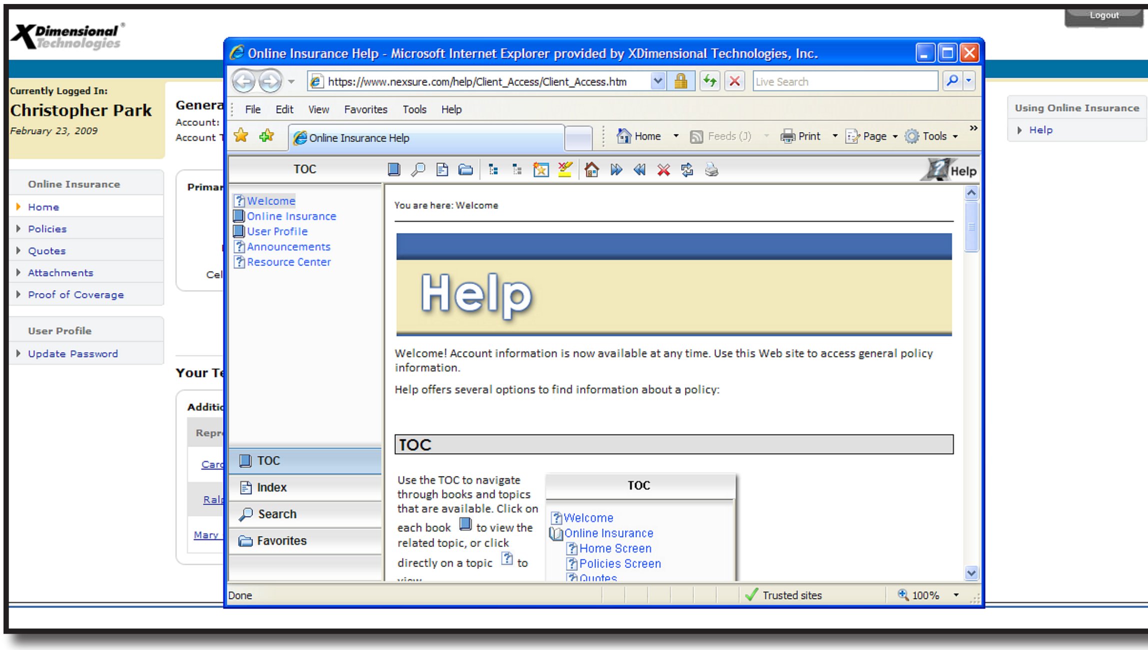
The first time the client's contact logs in to the portal, the temporary password provided in the User Login information email must be changed. After clicking the **Login** button the **Change Password** dialog box displays. A **Forgot Password?** link is provided on the login screen to use if the portal user's password is forgotten. A new temporary password is created and sent to the email address for the portal user name entered.



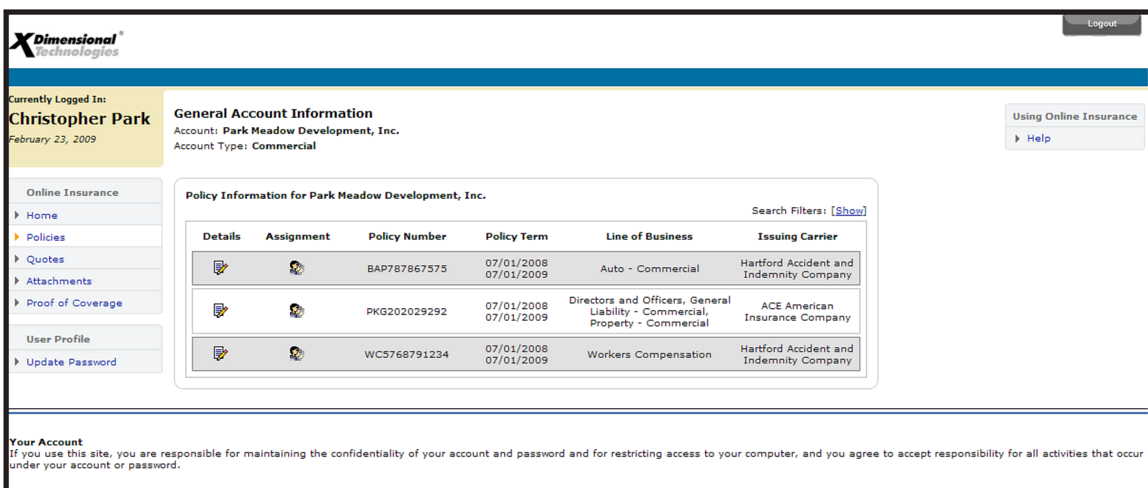
On the **Change Password** screen, the portal user must type in the **Current Password**, New **Password** and **Confirm Password**. Once login is completed by clicking the **Change Password** button, the **Home** screen is displayed. The **Change Password** screen will display each time the Portal User logs in using a temporary password.



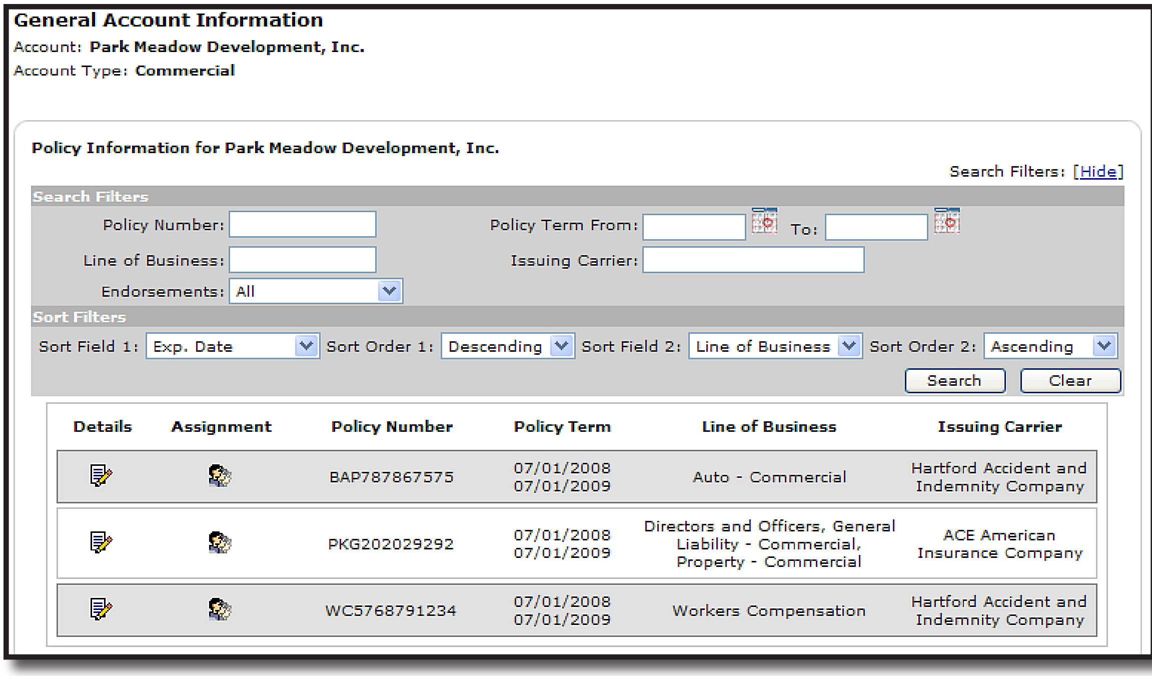
The **Home** screen shows part of the client's card file information including the active links for the phone numbers, website and assignment links. Clicking the **Help** link (which is on the right side of the screen) will launch **Online Insurance Help**. The first screen displayed provides instructions for using **Online Help**.



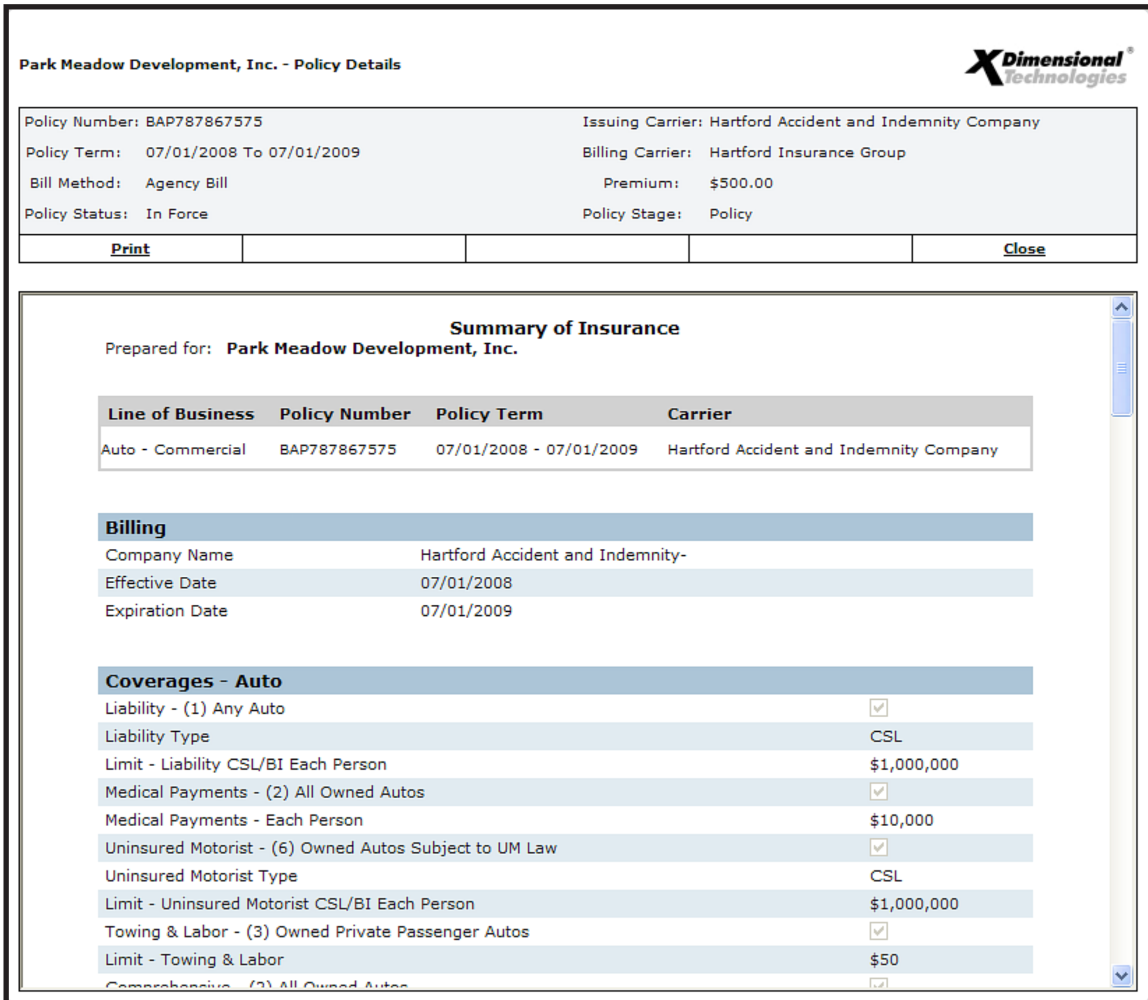
On the left side of the screen are the navigation links. Clicking the **Policies** link displays all policies the agency has identified as viewable by the client's Portal Users.



The **[Show]** link is available to search for a specific policy.



When a **Details**  icon is clicked the policy summary will be displayed, but **View** permissions to the policy summary must be enabled on the security template to activate the icon.



Park Meadow Development, Inc. - Policy Details

Policy Number:	BAP787867575	Issuing Carrier:	Hartford Accident and Indemnity Company
Policy Term:	07/01/2008 To 07/01/2009	Billing Carrier:	Hartford Insurance Group
Bill Method:	Agency Bill	Premium:	$500.00
Policy Status:	In Force	Policy Stage:	Policy

Print | Close

Summary of Insurance

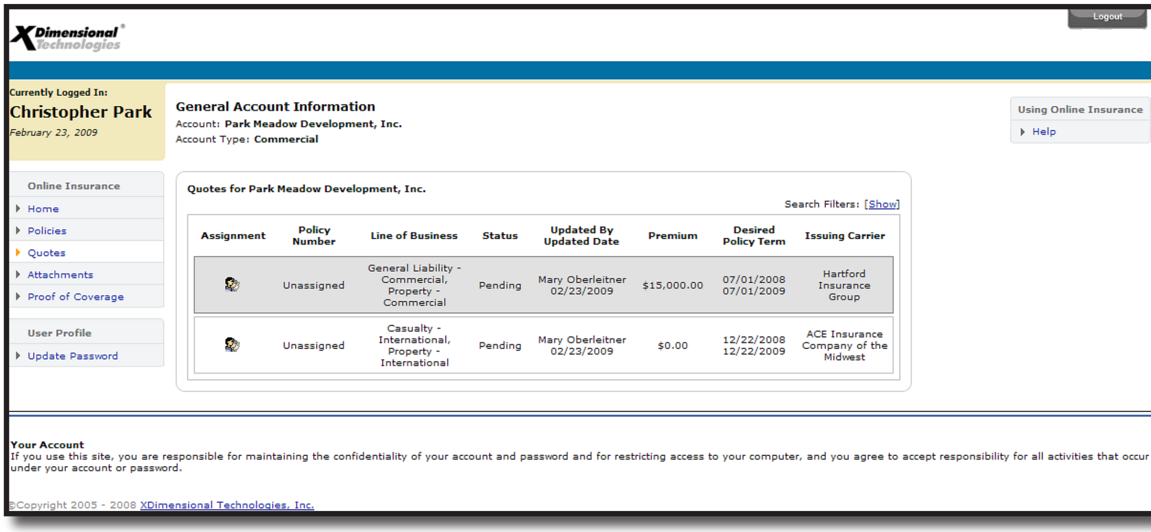
Prepared for: **Park Meadow Development, Inc.**

Line of Business	Policy Number	Policy Term	Carrier
Auto - Commercial	BAP787867575	07/01/2008 - 07/01/2009	Hartford Accident and Indemnity Company

Billing	
Company Name	Hartford Accident and Indemnity-
Effective Date	07/01/2008
Expiration Date	07/01/2009

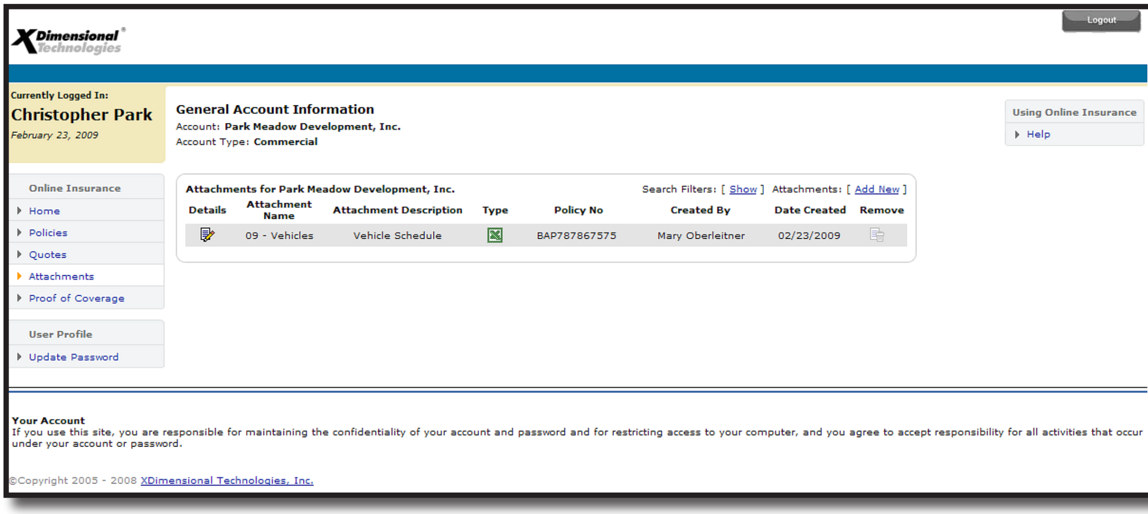
Coverages - Auto	
Liability - (1) Any Auto	☑
Liability Type	CSL
Limit - Liability CSL/BI Each Person	$1,000,000
Medical Payments - (2) All Owned Autos	☑
Medical Payments - Each Person	$10,000
Uninsured Motorist - (6) Owned Autos Subject to UM Law	☑
Uninsured Motorist Type	CSL
Limit - Uninsured Motorist CSL/BI Each Person	$1,000,000
Towing & Labor - (3) Owned Private Passenger Autos	☑
Limit - Towing & Labor	$50

Clicking the Quotes link displays any marketing records the agency has identified as being viewable by the client's Portal Users. On this screen the portal user can see where the agency is on the quoting process, so be sure and keep the status current and add the quote amount to the estimated premium fields on the **policy info** tab. The portal user will use the **[Show]** link to search as needed.

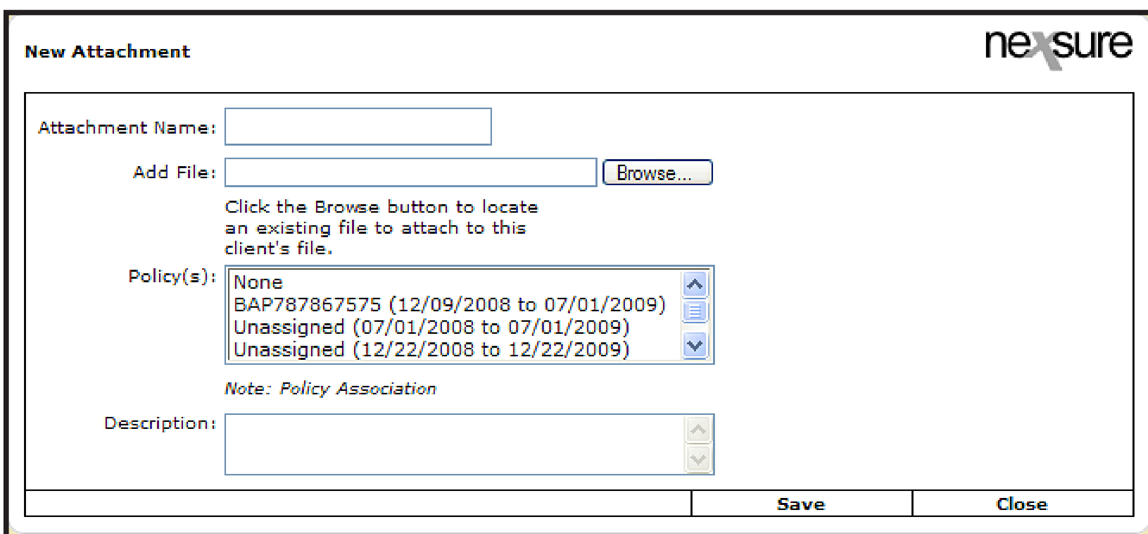


If the client would like contact information on someone assigned to the client, click the **Assignment** icon and any assignments added to the client profile will be displayed. Clicking the **Email** link will allow the portal user to send an email using their own email system, not Nexsure delivery.

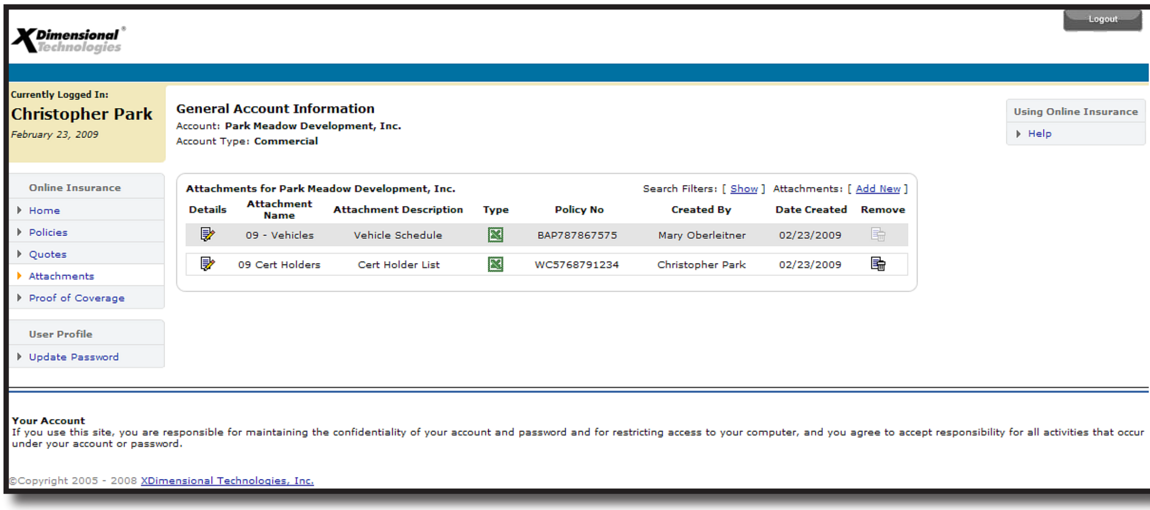
Clicking the **Attachments** link brings up attachments that have been identified as viewable by the client's Portal Users. The portal user may add attachments, view and delete attachments only if the security template added allows this access. Removal of attachments may only be done if the portal user is granted **Delete** permissions. The portal user will click the **[Show]** link to search for specific documents.



To add an attachment, the portal user will click the **[Add New]** link. **Attachment Name** and **Description** boxes will be completed by the portal user. Click the **Browse** button to locate an existing file to attach to the client's Nexsure attachments. Select the **Save** link to save the attachment to Nexsure. The document notification is delivered to agency personnel as added to **Attachment Notification Setup** in the Client Portal. For more information, see "Configuring Attachment Notifications" in Chapter 1.

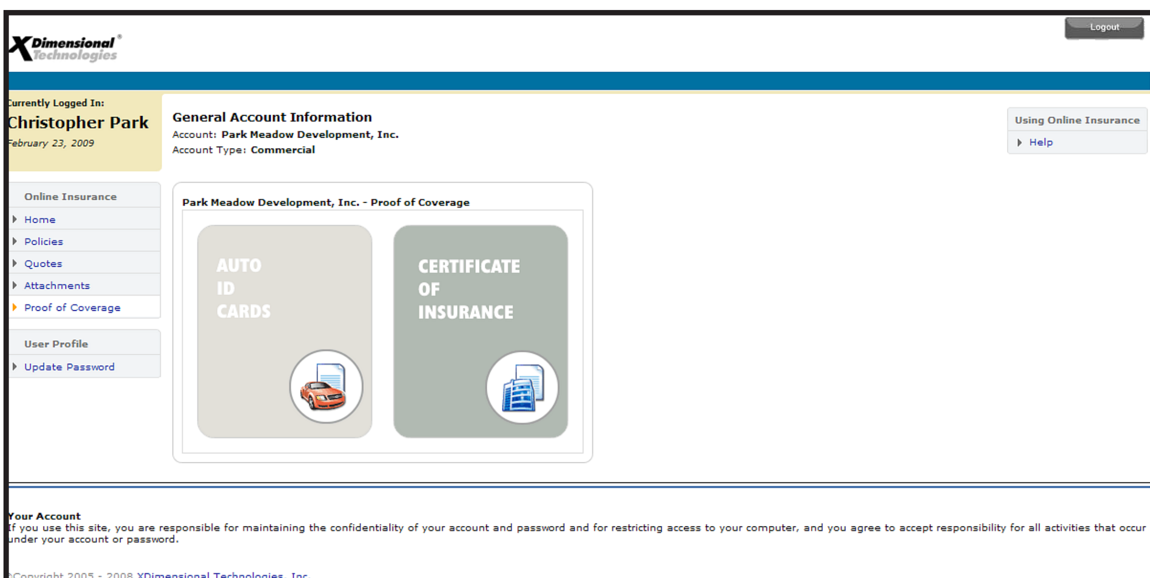


Any documents added by the client's portal user may be removed by the portal user who added it if security has been setup to grant **Delete** permissions. Notification will be sent to agency personnel as directed in setup. The **Remove** icon will only be active if security is granted or if the attachment was added by the client's portal user.

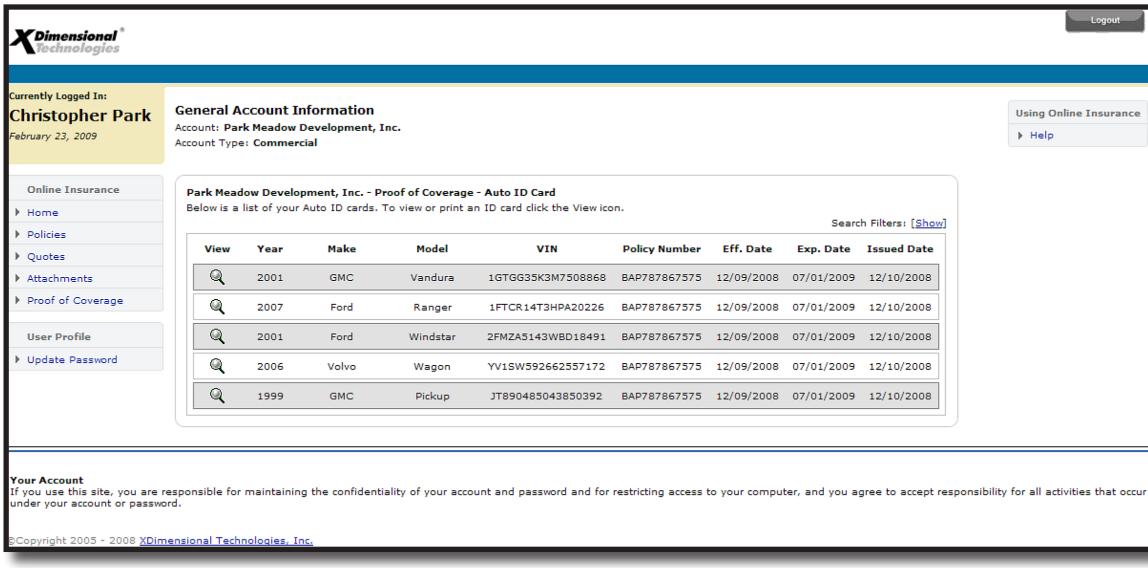


If security access has been granted, clicking the **Proof of Coverage** link allows the portal user to view and print auto ID cards and certificates issued by the agency. Permissions must be given for the policy to be viewable by the client's Portal Users on the **assignment** tab and **View** permissions in the assigned security user rights template.

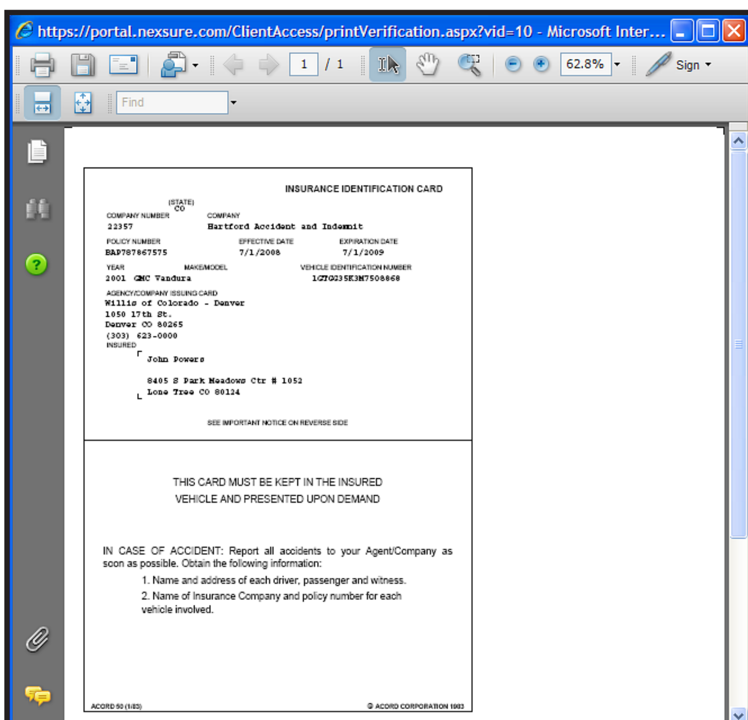
To view or print auto ID cards, click the **Auto ID Cards** link.



Any issued cards the client's portal user has policy permissions to view will be displayed. The **[Show]** link is available to search for a specific auto ID card.

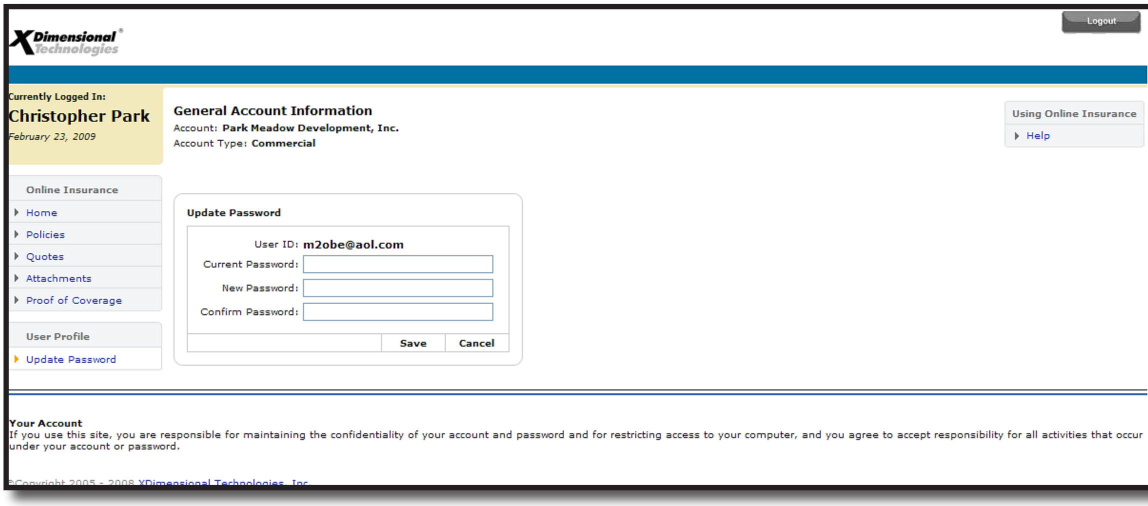


To view or print an auto ID card, click the **View** icon. The portal user will need to have Adobe Acrobat Reader® installed on the computer in order to view the card. Click the **Print** icon if a hard copy is desired.

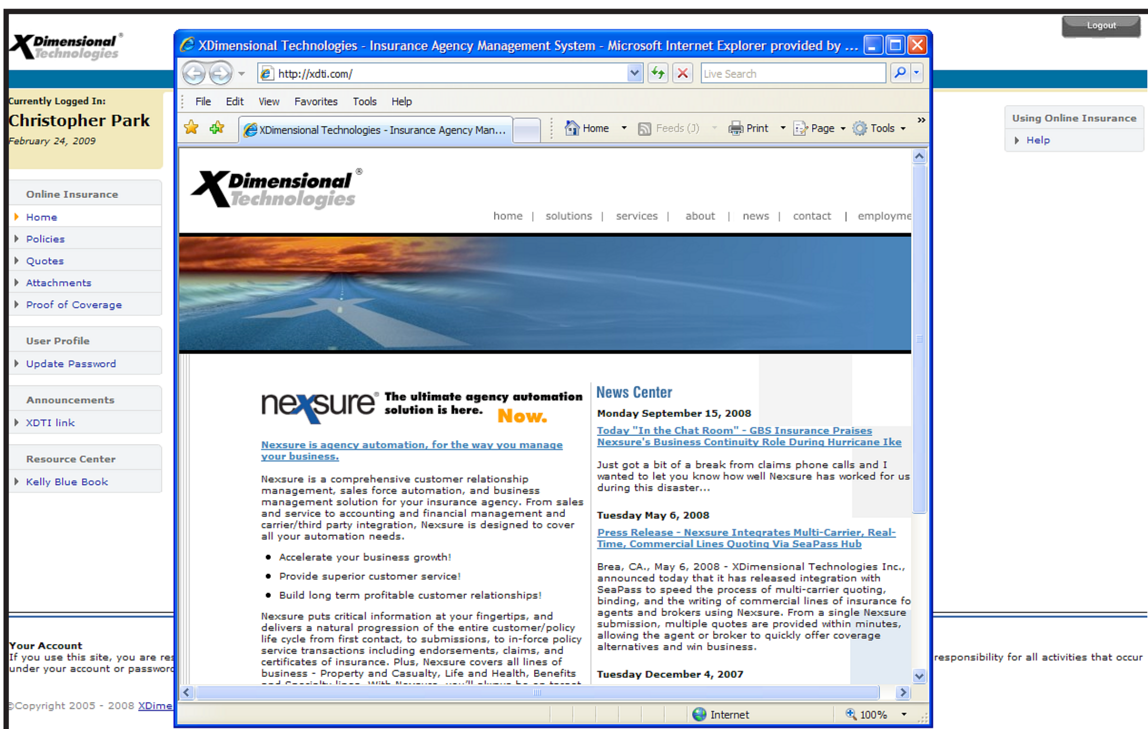


To view or print issued certificates, the **Certificate** link is selected and the same process is followed for viewing and printing auto ID cards.

The user profile will allow the client's contact to change the password for their portal login. After clicking **User Profile**, the portal user logged in will click on the **Update Password** link and type in the **Current Password**, **New Password** and **Confrim Password**. To save the changes, click the **Save** link. To abort the change, click the **Cancel** link.

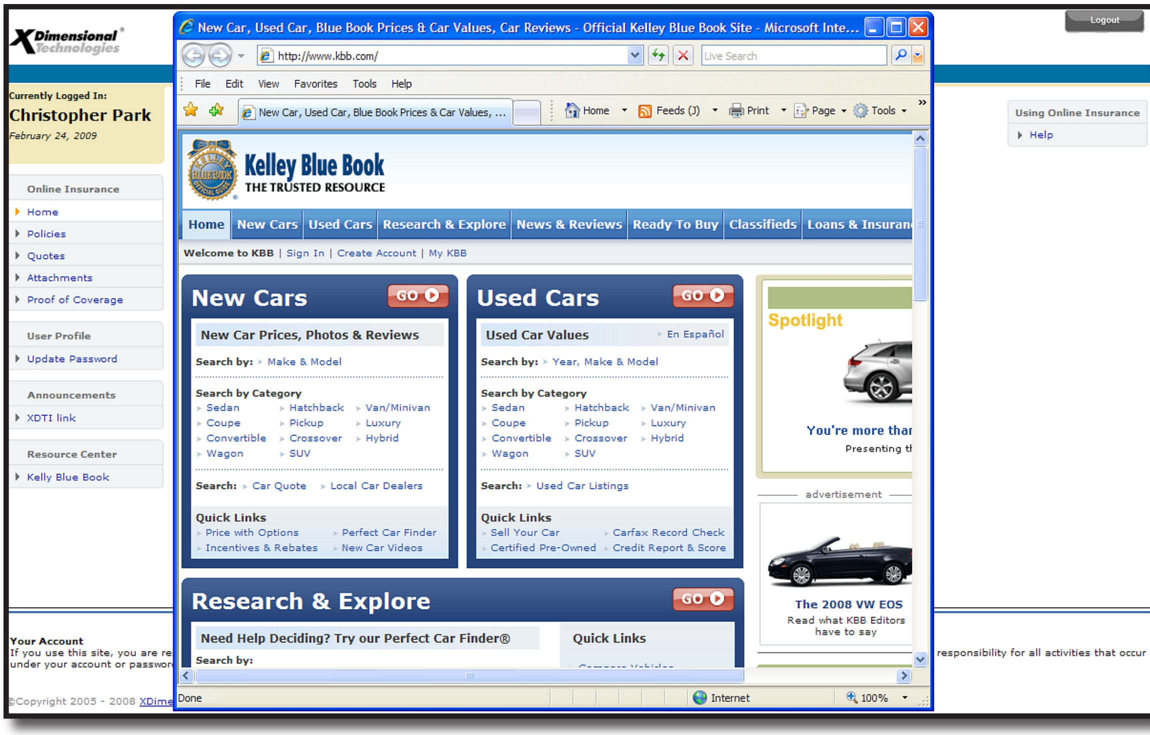


Clicking displayed **Announcement** links can either display a website or a dialog box with the announcement added by the agency. Security must be granted in order for announcements to display as added to **Announcement Setup** in Nexsure. For more information, see "Adding Announcements" in Chapter 1.



Clicking displayed resource center links will bring up the website added by the agency. Security must be granted in order for the resources to be displayed.

To logout, the user will click the **Logout** button on the top right of the screen.



Note: The **T-Log** in **Setup** will log when portal users sign into the portal.

Notes