AGENT PORTAL TRAINING GUIDE

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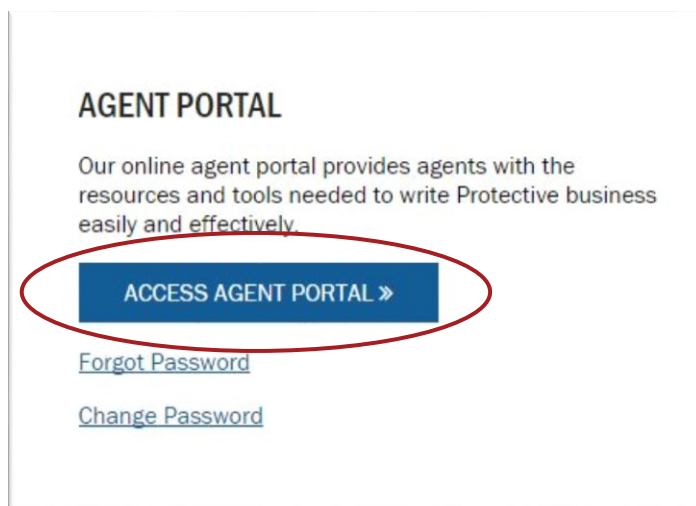
LOGGING INTO THE AGENT PORTAL

1. Go to **protectiveinsurance.com**.
2. Click on the **Agents** link.
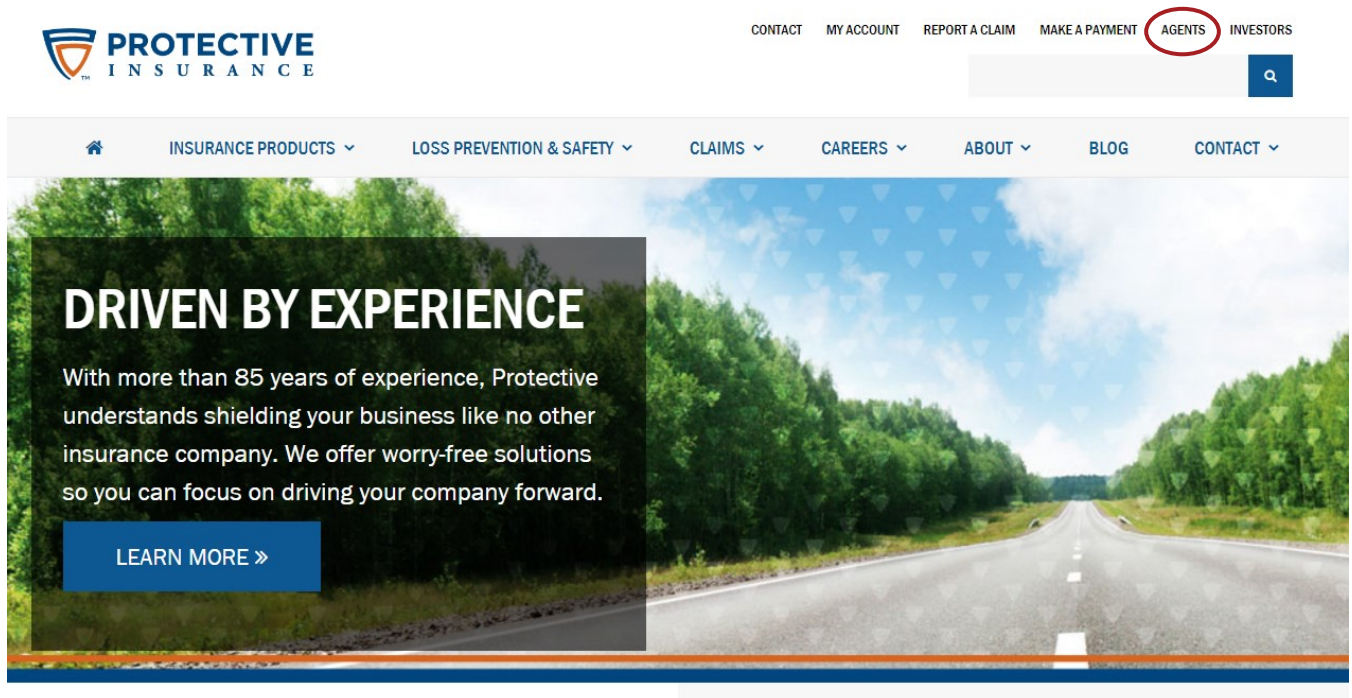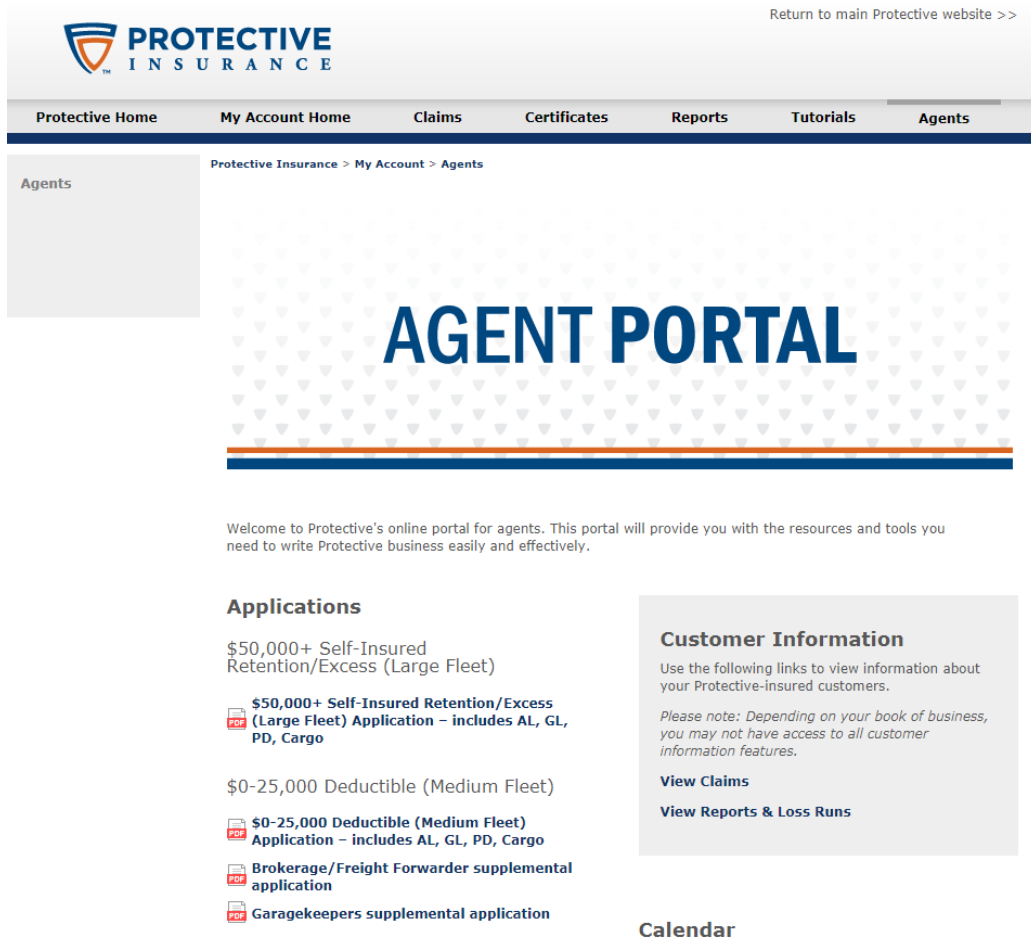

3. Select **Access Agent Portal**.

4. Log in via the **Log In Screen**.

5. After logging in, you will see the **Agent Portal homepage**.

PROTECTIVE CONTENT

1. To view applications, select the links in the **Applications** section under the desired product.

2. To access **Product Information**, click the links in the following area on the screen:

3. You can also access **Loss Prevention & Safety Services** information here:
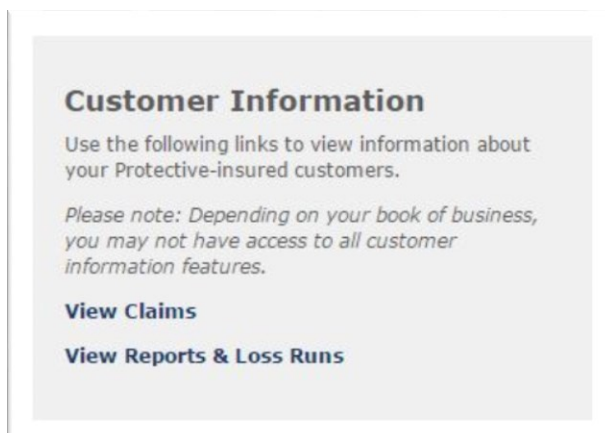
CLAIMS INFORMATION

1. To access **claims information**, **reports and loss runs**, select the links in the following area:

2. To view claims, select **View Claims**.

3. You will be taken to this page:

4. Select your **Account** name from the drop down.
5. Select your **Insurance Type**, then select a policy. To find the policy you are looking for, it may be helpful to sort by **Effective Date**. To sort by a column, click the arrows in that heading. If you are a self-insured client, you do not need to select a policy.

6. Search by **Claims** or **Transactions**.

You will be able to see a list of names, claim numbers and other pertinent information.

REPORT A CLAIM

1. To report a claim, select **View Claims** from the Agent Portal homepage, then select the link to report the appropriate type of claim.
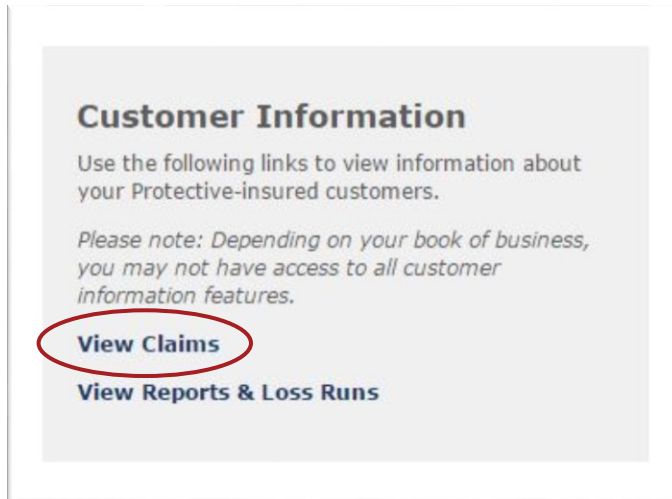
You can also select the **Claims** link in the top navigation bar and then select the link to report the appropriate type of claim.
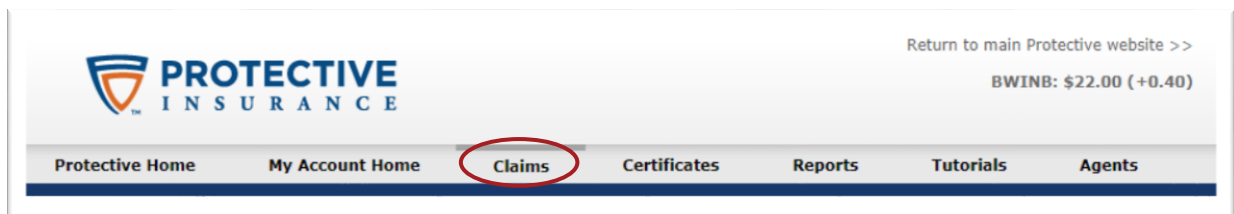
2. You will be directed to a form. Please complete and submit the form. One of Protective's adjusters will contact you to continue processing your claim.

REPORTS & LOSS RUNS

1. To view reports and loss runs from the Agent Portal homepage, select **View Reports & Loss Runs**.

Customer Information

Use the following links to view information about your Protective-insured customers.

Please note: Depending on your book of business, you may not have access to all customer information features.

View Claims

View Reports & Loss Runs
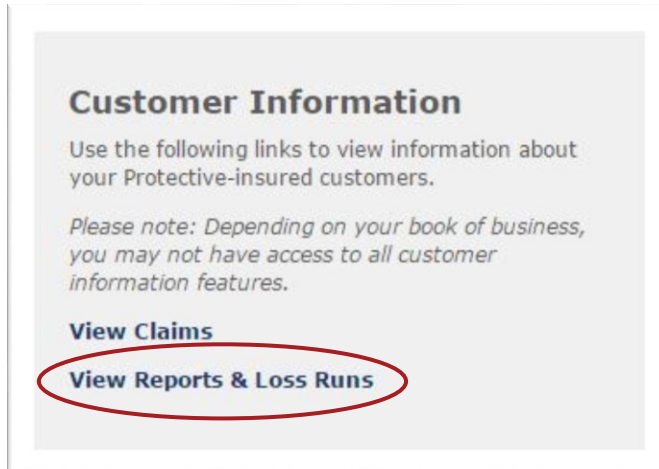
2. Select your **Account** name and hit **Go**.

Return to main Protective website >>

BWINB: $22.00 (+0.40)

| Protective Home | My Account Home | Claims | Certificates | Reports | Tutorials | Agents |

Protective Insurance > Reports

Reports

Choose Account to view reports: **ABC Trucking**   Go
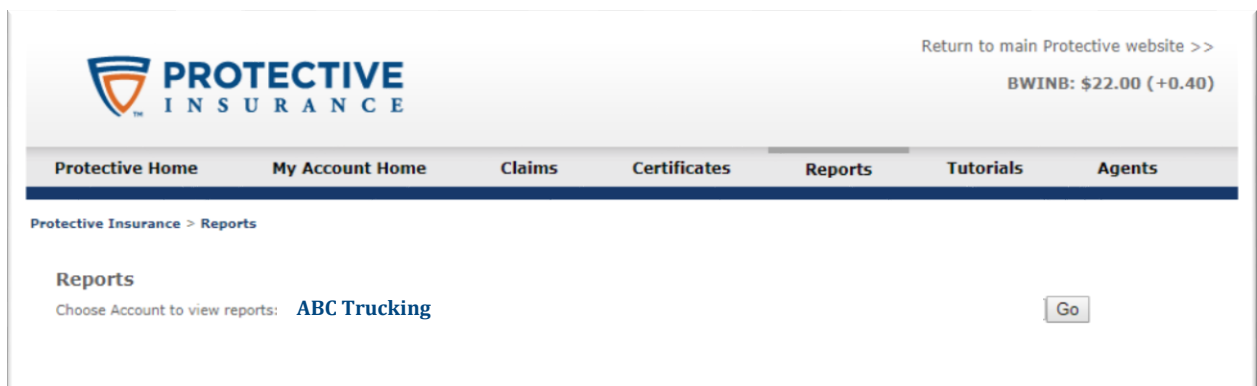
3. Select the desired product from the folders on the left, and then select the desired report on the right.
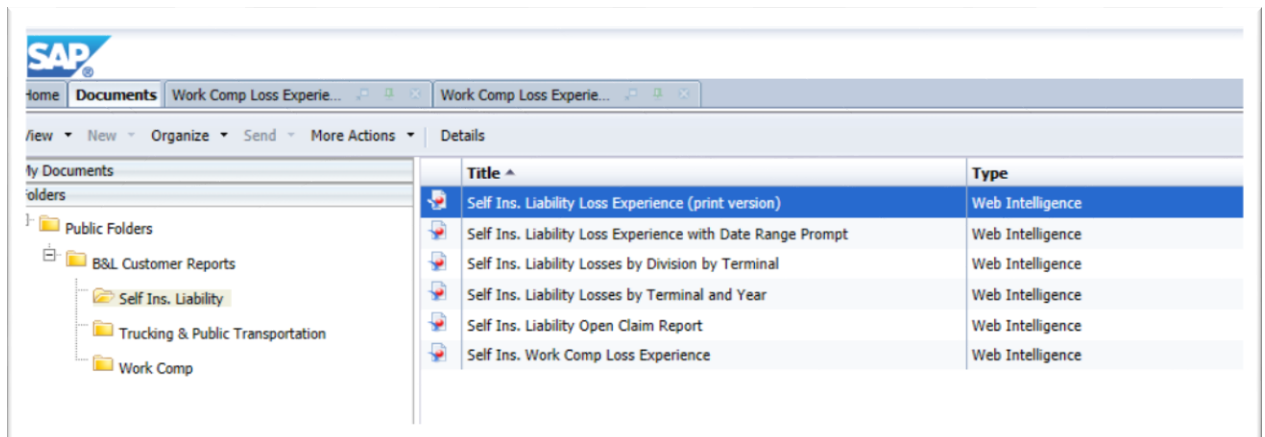
4. If you are prompted to enter any report parameters, enter the appropriate values and select OK.
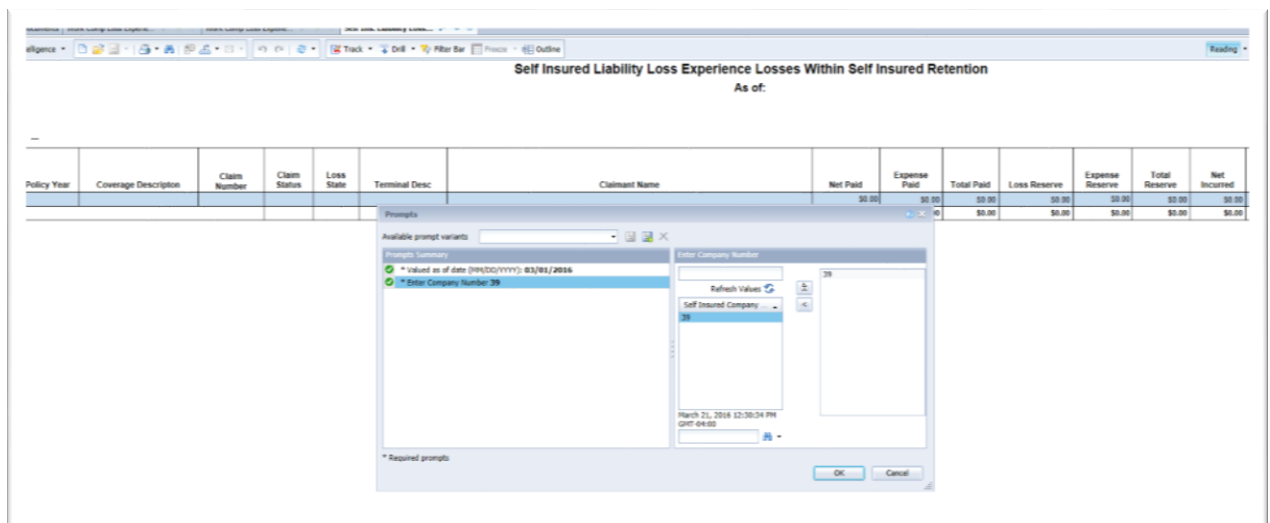
5. You will then see the report data.

Self Insured Liability Loss Experience Losses Within Self Insured Retention
As of: 3/21/2016 12:00:00 AM

#MULTIVALUE

Policy Year	Coverage Description	Claim Count	Net Paid	Expense Paid	Total Paid	Loss Reserve	Expense Reserve	Total Reserve	Net Incurred	Expense Incurred	Total Incurred
1998	LIABILITY	14	$260,195.70	$172,197.88	$432,393.58	$0.00	$0.00	$0.00	$260,195.70	$172,197.88	$432,393.58
	Totals	14	$260,195.70	$172,197.88	$432,393.58	$0.00	$0.00	$0.00	$260,195.70	$172,197.88	$432,393.58

Policy Year	Coverage Description	Claim Count	Net Paid	Expense Paid	Total Paid	Loss Reserve	Expense Reserve	Total Reserve	Net Incurred	Expense Incurred	Total Incurred
2000	GENERAL LIABILIT	3	$0.00	$1,076.10	$1,076.10	$0.00	$0.00	$0.00	$0.00	$1,076.10	$1,076.10
	LIABILITY	690	$2,506,935.44	$451,463.39	$2,958,398.83	$0.00	$0.00	$0.00	$2,506,935.44	$451,463.39	$2,958,398.83
	Totals	693	$2,506,935.44	$452,539.49	$2,959,474.93	$0.00	$0.00	$0.00	$2,506,935.44	$452,539.49	$2,959,474.93

Policy Year	Coverage Description	Claim Count	Net Paid	Expense Paid	Total Paid	Loss Reserve	Expense Reserve	Total Reserve	Net Incurred	Expense Incurred	Total Incurred
2002	GENERAL LIABILIT	1	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
	LIABILITY	163	$532,123.15	$175,187.91	$707,311.06	$0.00	$0.00	$0.00	$532,123.15	$175,187.91	$707,311.06
	Totals	164	$532,123.15	$175,187.91	$707,311.06	$0.00	$0.00	$0.00	$532,123.15	$175,187.91	$707,311.06

Policy Year	Coverage Description	Claim Count	Net Paid	Expense Paid	Total Paid	Loss Reserve	Expense Reserve	Total Reserve	Net Incurred	Expense Incurred	Total Incurred
2003	LIABILITY	159	$817,180.39	$301,066.02	$1,118,246.41	$0.00	$0.00	$0.00	$817,180.39	$301,066.02	$1,118,246.41
	Totals	159	$817,180.39	$301,066.02	$1,118,246.41	$0.00	$0.00	$0.00	$817,180.39	$301,066.02	$1,118,246.41

TUTORIALS & HELP

1. For additional help accessing the Agent Portal, you can also view a video tutorial by selecting the **Video Tutorial** link on the Agent Portal homepage.