AGENT PORTAL TRAINING GUIDE

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LOGGING INTO THE AGENT PORTAL

2. Click on the Agents link.
4. Log in via the Log In Screen.

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

![Safety Resources](image)

**CLAIMS INFORMATION**

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

![Customer Information](image)

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.

   ![View Claims](image1.png)

   ![Customer Information](image2.png)

   You can also select the Claims link in the top navigation bar and then select the link to report the appropriate type of claim.

   ![Claims](image3.png)

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.

   ![Protective Insurance](image4.png)
REPORTS & LOSS RUNS

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

2. Select your **Account** name and hit **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.
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.