

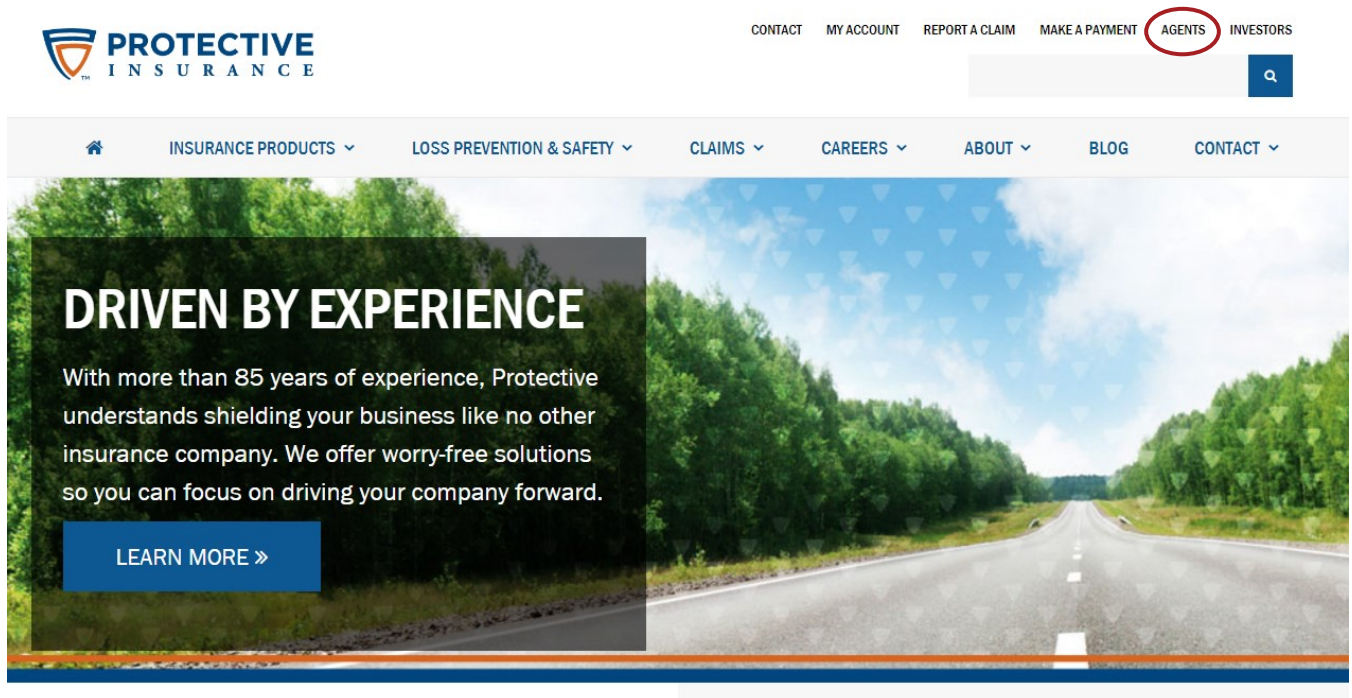
AGENT PORTAL TRAINING GUIDE

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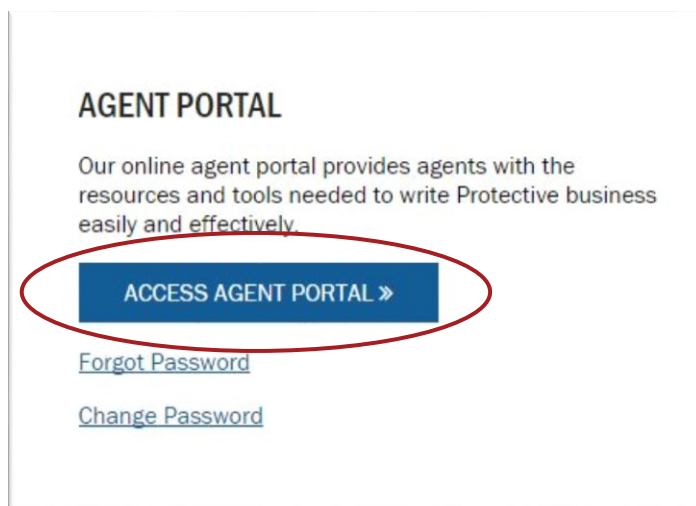
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LOGGING INTO THE AGENT PORTAL

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



3. Select **Access Agent Portal**.

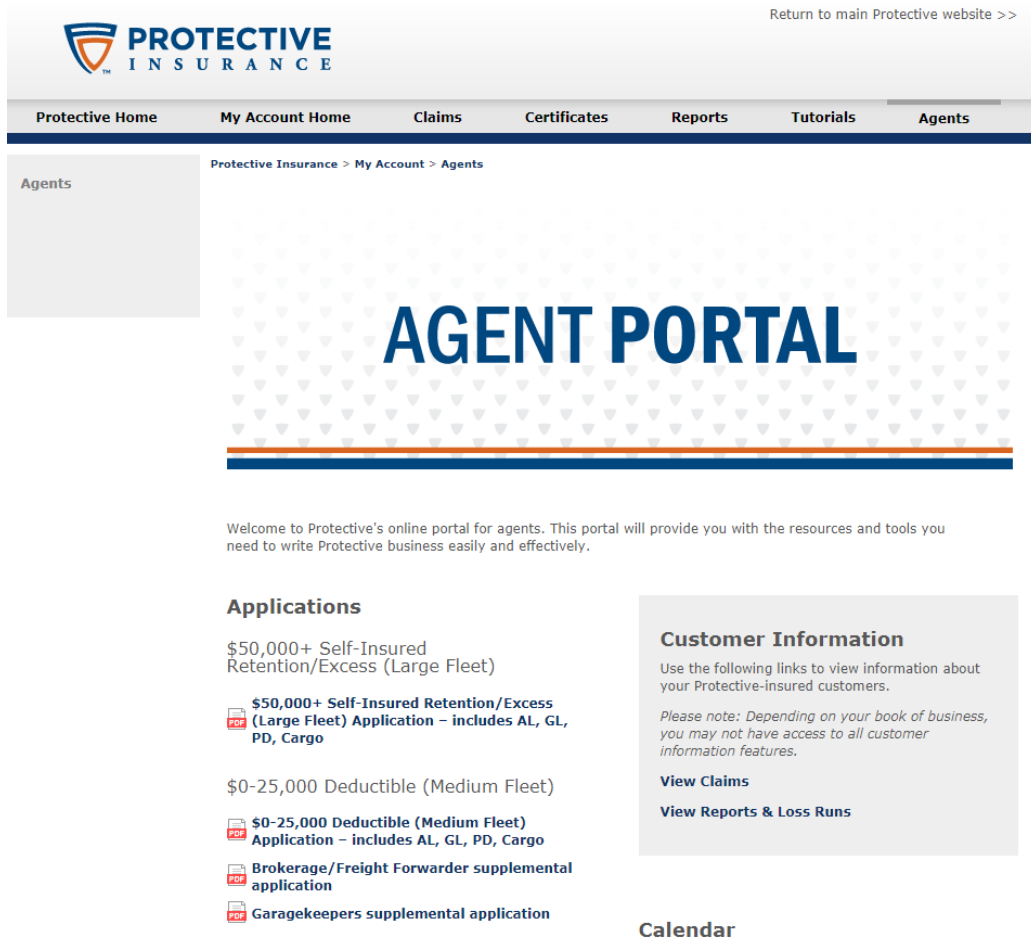


4. Log in via the **Log In Screen**.



The log in screen features the Protective Insurance logo at the top left. Below the logo, the text "Please log in." is displayed. There are two input fields: "User name:" and "Password:". To the right of the "Password:" field is a "Sign In" button. Below the "Sign In" button is a link that says "Forgot Password?".


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




The Agent Portal homepage features the Protective Insurance logo at the top left. To the right of the logo is a link that says "Return to main Protective website >>". Below the logo is a navigation bar with links: "Protective Home", "My Account Home", "Claims", "Certificates", "Reports", "Tutorials", and "Agents". Below the navigation bar is a sidebar with a link that says "Agents". The main content area has a large heading that says "AGENT PORTAL". Below the heading is a welcome message: "Welcome to Protective's online portal for agents. This portal will provide you with the resources and tools you need to write Protective business easily and effectively." Below the welcome message are two sections: "Applications" and "Customer Information". The "Applications" section lists four applications: "\$50,000+ Self-Insured Retention/Excess (Large Fleet)", "\$50,000+ Self-Insured Retention/Excess (Large Fleet) Application – includes AL, GL, PD, Cargo", "\$0-25,000 Deductible (Medium Fleet)", and "\$0-25,000 Deductible (Medium Fleet) Application – includes AL, GL, PD, Cargo". The "Customer Information" section lists two links: "View Claims" and "View Reports & Loss Runs".


Applications


\$50,000+ Self-Insured Retention/Excess (Large Fleet)

 **\$50,000+ Self-Insured Retention/Excess (Large Fleet) Application – includes AL, GL, PD, Cargo**

\$0-25,000 Deductible (Medium Fleet)

 **\$0-25,000 Deductible (Medium Fleet) Application – includes AL, GL, PD, Cargo**

 **Brokerage/Freight Forwarder supplemental application**

 **Garagekeepers supplemental application**

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


Calendar

PROTECTIVE CONTENT




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

Applications


\$50,000+ Self-Insured Retention/Excess (Large Fleet)

 [\\$50,000+ Self-Insured Retention/Excess \(Large Fleet\) Application – includes AL, GL, PD, Cargo](#)



\$0-25,000 Deductible (Medium Fleet)

 [\\$0-25,000 Deductible \(Medium Fleet\) Application – includes AL, GL, PD, Cargo](#)
 [Brokerage/Freight Forwarder supplemental application](#)
 [Garagekeepers supplemental application](#)




Independent Contractor

 [Independent Contractor Application – includes Occ/Acc, NTL, PD](#)

Public Transportation

 [Public Transportation Application](#)
 [Public Transportation Renewal Application](#)

Workers' Compensation

 [Transportation Workers' Compensation Supplemental Application](#)
 [Aircraft Supplemental Application](#)
 [Aircraft Pilot Supplemental Application](#)

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

Product Information

Commercial Auto

 [Self-Insured Retention/Excess Product Guide](#)
 [Public Transportation Product Guide](#)
 [Guaranteed Cost or Deductible Product Guide](#)

Workers' Compensation

 [Fleet Workers' Compensation Product Guide](#)
 [Workers' Compensation Product Guide](#)
 [Workers' Compensation Agent Toolkit](#)

Independent Contractor

 [Independent Contractor Appetite Guide](#)

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



Garagekeepers supplemental application

Independent Contractor

Independent Contractor Application – includes Occ/Acc, NTL, PD

Public Transportation

Public Transportation Application

Public Transportation Renewal Application

Workers' Compensation

Workers' Compensation Application

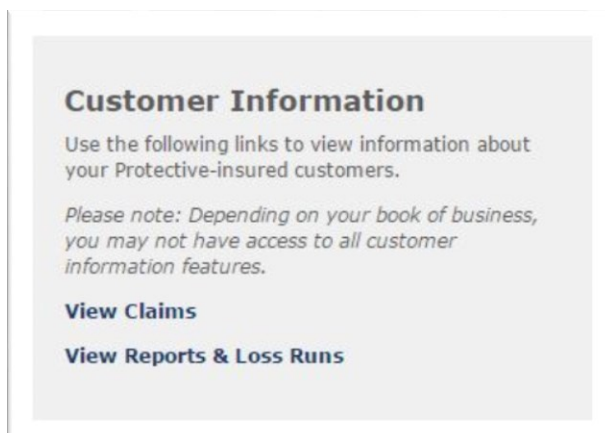
Safety Resources
[View Loss Prevention & Safety Resources](#)

Sample Documents

- ☐ AL Excess Policy (Self-Insured Retention/Large Fleet)
- ☐ AL Deductible Policy (Medium Fleet)
- ☐ Large Deductible Workers' Compensation Policy
- ☐ Letter of Credit template
- ☐ Collateral Agreement
- ☐ Indemnity Agreement

CLAIMS INFORMATION

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



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

3. You will be taken to this page:

Claims

Report a claim

To report a self-insured/contract claim, please use our **self-insured/contract claim reporting form**.

To report a workers' compensation claim, please use our **workers' compensation claim reporting form**.

To report a vehicle claim, please use our **vehicle claim reporting form**.

View claims and transactions

To view existing claims and transactions, follow these steps to use the form below:

1. Select an account. (This is only applicable if a drop-down menu with multiple accounts appears under Account.)
2. Select an insurance type.
3. 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 the column heading.) If you are a self-insured client, you will not need to select a policy. You can go directly to step 3.
4. Choose whether you would like to search by Claims or Transactions.
5. Enter your search terms.
6. Select an item from the results and click the View button.

*Account:

Select One...

*Insurance Type:

*Policy:

Show 10 entries

Search:

Select Policy Nr

Claimant

Effective Date

No data available in table

Showing 0 to 0 of 0 entries

First Previous Next Last

*Search By:

☐ Claims
 ☐ Transactions

Search

View

Export List

Print List

Show 10 entries

Search:

Select Driver Name

Claim #

Claim Client #

Acct Date

Paid

Reserve

Incurred

Expense

No data available in table

Showing 0 to 0 of 0 entries

First Previous Next Last

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.

*Account:

ABC Trucking

*Insurance Type:

Protective Insured Liability

*Policy:

Show 10 entries

Search:

Select Policy Nr

Claimant

Effective Date

No data available in table

Showing 0 to 0 of 0 entries

First Previous Next Last

* Search By:

☒ Claims

☐ Transactions

Claim #

Driver Name

Loss Date After

Loss Date Before

Search

View

Export List

Print List

Show	10	entries	Search:					
Select	Driver Name	Claim #	Client Claim #	Acct Date	Paid	Reserve	Incurred	Expense
<input type="checkbox"/>	Sandrine Haller	70-000001234	0	2015-05-15	0.00	0.00	0.00	0.00
<input type="checkbox"/>	Sandrine Haller	70-000001235	0	2015-05-15	9999.00	0.00	9999.00	0.00
<input type="checkbox"/>	Sandrine Haller	70-000001236	0	2015-05-15	12345.62	0.00	12345.62	999.12
<input type="checkbox"/>	Sandrine Haller	70-000001237	0	2015-05-15	0.00	0.00	0.00	0.00
<input type="checkbox"/>	Sarahella York	70-000001232	0	2015-05-15	0.00	0.00	0.00	25.00
<input type="checkbox"/>	Reel Tridman	70-000001231	0	2015-05-15	0.00	0.00	0.00	0.00
<input type="checkbox"/>	Evette Driver	70-000001237	0	2015-10-12	0.00	0.00	0.00	17.24
<input type="checkbox"/>	Greg Friedman	70-000001230	0	2015-11-30	4040.00	0.00	4040.00	100.00
<input type="checkbox"/>	Greg Friedman	70-000001230	0	2015-11-30	17500.00	0.00	17500.00	95.00
<input type="checkbox"/>	Worley Drake	70-000001231	0	2015-11-30	0.00	0.00	0.00	0.00

Showing 1 to 10 of 20 entries

First

Previous

1

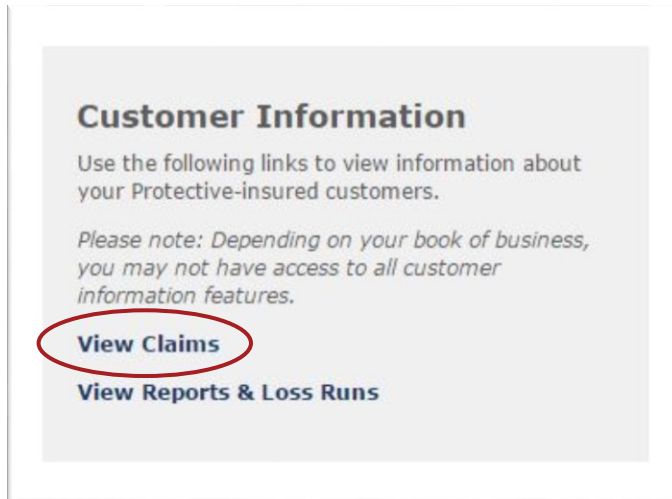
2

Next

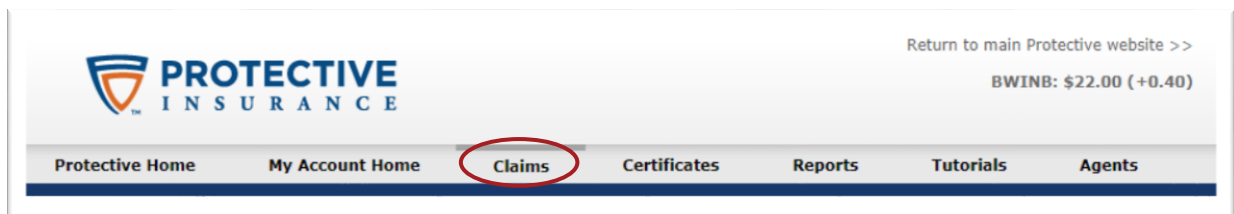
Last

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.



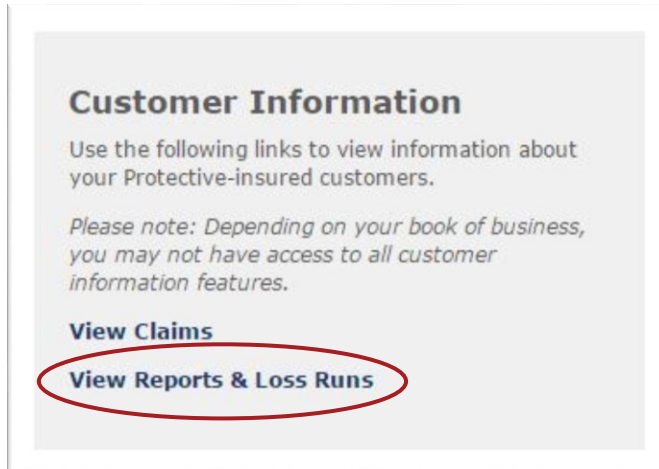
You can also select the **Claims** link in the top navigation bar and then select the link to report the appropriate type of claim.



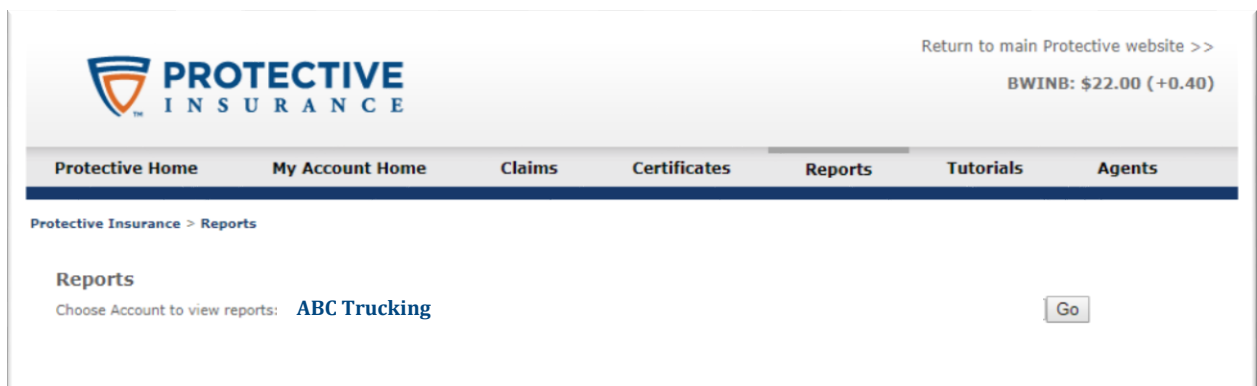
2. You will be directed to a form. Please complete and submit the form. One of Protective's adjusters will contact you to continue processing your claim.

REPORTS & LOSS RUNS

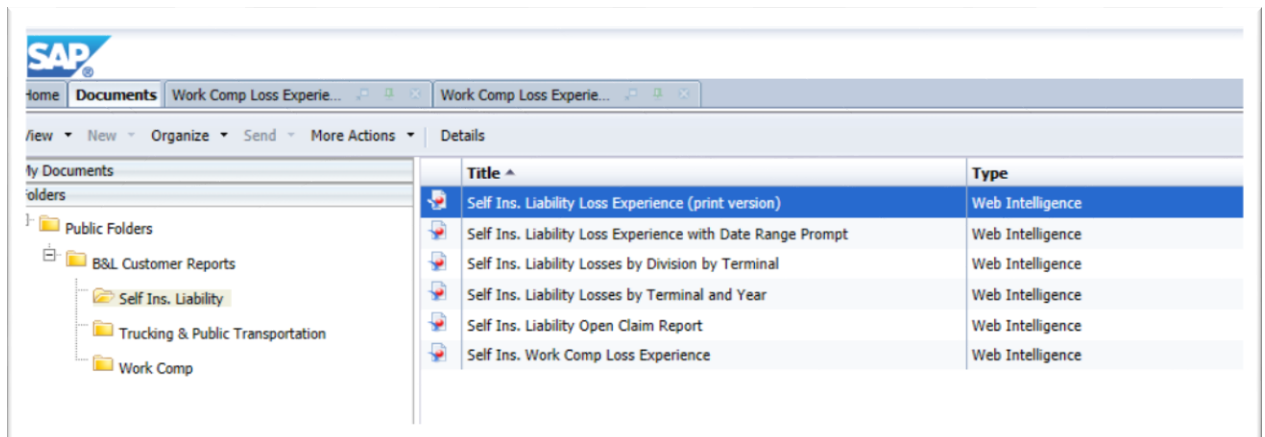
1. To view reports and loss runs from the Agent Portal homepage, select **View Reports & Loss Runs**.



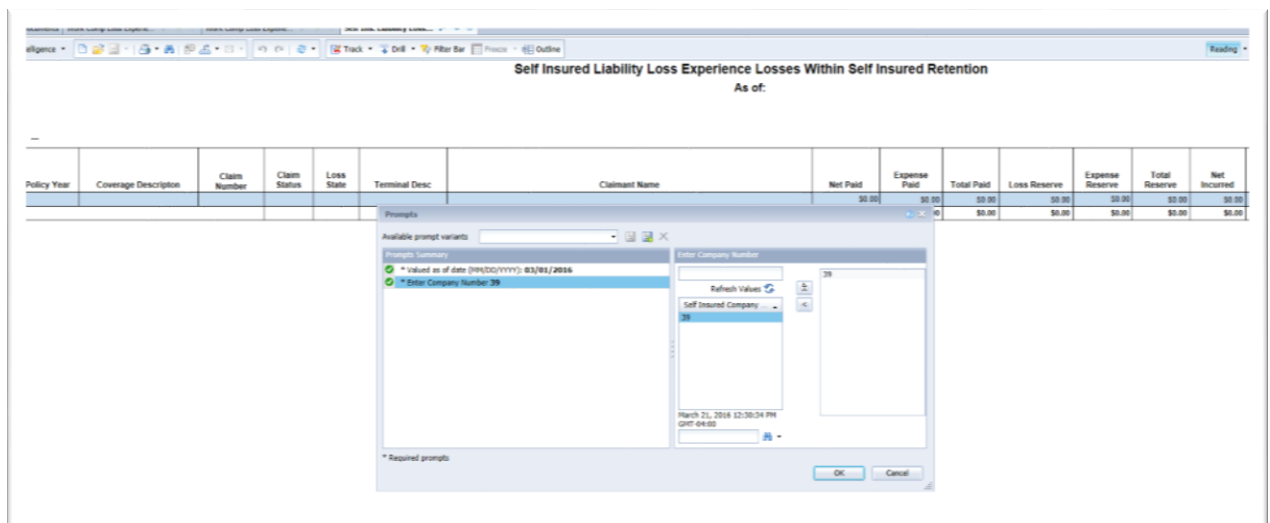
2. Select your **Account** name and hit **Go**.



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.

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 LIABILT	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 LIABILT	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.

