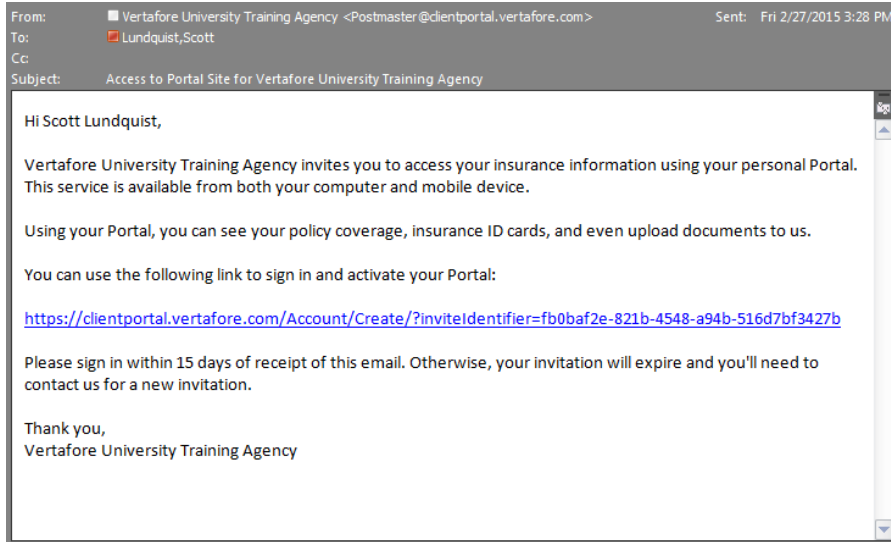




Client Portal Features and Instructions

Using the Portal

We are 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:



Use the link in the email to open and activate your account for the Portal. If you haven't 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 haven't received the email in your Inbox, check your Junk email folder.*

Accessing the Portal

To access the portal, go to www.smginsurance.com and click "Client Portal" from the center of the menu bar running across the page. Another webpage will open and you can enter your login credentials.

What You Can See and Do in the Portal?

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 Policies, Auto ID Cards, Claims, Documents, Certificates and Payment Options.

What you see may differ depending on your permissions.

- OVERVIEW
- POLICIES
- AUTO ID
- CLAIMS
- DOCUMENTS
- CERTIFICATES
- FCCI PAYMENT
- ≡

Hello Drew Gilbreath!







My Quick Links			My Team	
<p>Auto</p> <ul style="list-style-type: none"> Download auto ID Add a driver Remove a driver Add a vehicle Remove a vehicle 	<p>Certificates</p> <ul style="list-style-type: none"> Add a holder Request new certificate 	<p>Policies</p> <ul style="list-style-type: none"> Change a policy File a claim 	<div style="display: flex; align-items: center;"> <div> <p>DREW GILBREATH, CIC</p> <p>Accountant</p> <p>Office: 6785332260 x2260</p> <p>dgilbreath@smginsurance.com</p> </div> </div>	



Client Portal Features and Instructions

The Policies Tab

The policies tab displays all of your current and future policies. Each policy includes the policy number, the type of policy (such as General Liability or Commercial Auto), and the policy term, an icon for the insurance company providing the coverage, and a View Summary link. If the View Summary Link says not yet available it means the software doesn't provide a summary of that policy type at this time.




OVERVIEW	<u>POLICIES</u>	AUTO ID	CLAIMS	DOCUMENTS	CERTIFICATES
⇅					
	# A01 0851652 Private Passenger Auto	2/6/2017 - 2/6/2018 CURRENT	Cincinnati Insurance Companies	 View Summary	
	# U01 0851652 Personal Umbrella	2/6/2017 - 2/6/2018 CURRENT	Cincinnati Insurance Companies	 View Summary	
	# H01 0851652 Homeowners	2/6/2017 - 2/6/2018 CURRENT	Cincinnati Insurance Companies	 View Summary	

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

The Auto ID Tab

Your current auto policies are examined for vehicles insured on the policy. When a vehicle is found it appears on the Auto ID tab. On this tab you can print an Auto ID card for a policy or view it online.

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

OVERVIEW	POLICIES	<u>AUTO ID</u>	CLAIMS	DOCUMENTS	CERTIFICATES
Search by year, make, model, VIN, or policy # <input type="text"/>  ⇅					
	2017 NISSAN/DATSUN MURANO... VIN # 5N1A22MG6HN114527	2/6/2017 - 2/6/2018 # A01 0851652	Andrew T Gilbreath	ACTIONS ▾	
	2011 FORD EDGE VIN # 2FMDK3KC9BBB06349	2/6/2017 - 2/6/2018 # A01 0851652	Andrew T Gilbreath	ACTIONS ▾	



Client Portal Features and Instructions

The Claims Tab

On this 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.

OVERVIEW	POLICIES	AUTO ID	<u>CLAIMS</u>	DOCUMENTS	CERTIFICATES
START A NEW CLAIM					↑↓
# CH156944 Water damage	1/8/2014 # US281530913	HO Water damage/Pipe burst in basement causing water damage.		CLOSED	

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.

Start a New Claim ✕

Please provide the following information. Your agent will follow up with you when the claim is received.

Policy

Please choose... ▼

3. Complete the fields on the Claim form. Some selections you choose from a list while others you type in the information. The fields in blue must be completed.
4. When you have finished entering all of the information, click **Submit**.
5. After entering the claim you'll see the claim you've entered with a status of Pending and a notation of Sent to Agent. You will also receive an email confirming the submission.
6. When your claim has been reviewed by our staff, you will be contacted, the claim will be filed and the status changes to Open.



Client Portal Features and Instructions



The Documents Tab

On the Documents tab you'll 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. Your policies for the current year and endorsements can be found here.

OVERVIEW POLICIES AUTO ID CLAIMS **DOCUMENTS** CERTIFICATES CINCINNATI PAYMENT ☰

All Files ▾

[ADD DOCUMENT](#) [CREATE NEW FOLDER](#) [SHARE IN EMAIL](#) 🔍 ⌵

 2017 Insurance Policies <small>OWNED BY Drew Gilbreath</small>	CREATED ON 3/1/2017	5 Items	ACTIONS ▾
 new Folder <small>OWNED BY Drew Gilbreath</small>	CREATED ON 3/29/2017	1 Items	ACTIONS ▾

Under the Actions drop-down you can download the document, move it, rename it, or delete it.

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

All Files ▾

[ADD DOCUMENT](#) [CREATE NEW FOLDER](#) 🔍 ⌵



Client Portal Features and Instructions

Certificates Tab

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

OVERVIEW POLICIES AUTO ID CLAIMS DOCUMENTS **CERTIFICATES** CINCINNATI PAYMENT ☰

[REQUEST CERTIFICATE](#) Search by certificate # or description 🔍 ⌵

	# 2017/2018 Master Cert	Certificate of Liability ACORD 25	7 Holders	ACTIVE	View Master
	# Master BR Cert	Certificate of Property ACORD 24	3 Holders	ACTIVE	View Master

To issue a certificate click on the Master Certificate Icon on the left hand side to show the Add Holder button and a list of any previously issued certificates. To add a Certificate Holder click Add Holder and enter the contact information of the certificate holder.

OVERVIEW POLICIES AUTO ID CLAIMS DOCUMENTS **CERTIFICATES** CINCINNATI PAYMENT ☰

CERTIFICATE HOLDERS [< BACK TO LIST](#)

	# 2017/2018 Master Cert	Certificate of Liability ACORD 25	7 Holders	ACTIVE	
--	--------------------------------	--------------------------------------	-----------	--------	--

Holders [ADD HOLDERS](#) Search Holders by Name, Address, or Job # 🔍 ⌵

AAA Contractor	ISSUED	JOB #	DESCRIPTION OF OPERATIONS	ACTIONS
234 Main St Duluth, GA 30097	3/27/2017		Certificate Holder is an additional insured as...	⌵

All of the fields in blue shown below are required to issue a certificate.

Add Holder ✕

Choose from an existing holder or create a new one.

Choose from list or start typing a name. ▾

Name 1	Name 2	
<input type="text" value="New Holder"/>	<input type="text"/>	
Address 1	Address 2	
<input type="text" value="123 Main St"/>	<input type="text"/>	
City	State	Zip
<input type="text" value="Lawrenceville"/>	<input type="text" value="GA"/> ▾	<input type="text" value="30043"/>
Contact	Email Address	
<input type="text"/>	<input type="text" value="info@smginsurance.com"/>	
Fax	Ext.	Method of Distribution
<input type="text"/>	<input type="text"/>	<input type="text" value="Email"/> ▾



Client Portal Features and Instructions

Certificates (Continued)

Once the fields are complete, scroll down and select the Method of Distribution. If you are going to email the certificate, once you fill in the email to options will populate below. Check the first box to automatically email the certificate once the Add Holders button is clicked. Check the second box if you would like to also receive a copy of the certificate via email. If you wish to add multiple certificate holders, click Another Holder and complete the fields for that holder. When all of the holders have been added click Add Holders to distribute them.

Method of Distribution

Email

Fax Ext.

Email

Automatically send certificate to this address

Send a copy to me

Comments for Your Agent

ANOTHER HOLDER

Payment Tabs

If your insurance company offers an online payment feature, we can also display their payment website in your portal. If you have policies with more than one insurance company you may have multiple payment tabs. Those additional can be accessed by clicking the ≡ at the far right of the tabs for additional tabs.

OVERVIEW POLICIES AUTO ID CLAIMS DOCUMENTS CERTIFICATES CINCINNATI PAYMENT ≡

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PAY NOW

Directly billed personal, life and business policyholders and surety bond principals – those billed by Cincinnati and not your local agent – can make a single premium payment from your bank account or with your credit or debit card without registering or logging in. Please select your account type to begin paying your bill.

Personal (Auto/Home/Boat)

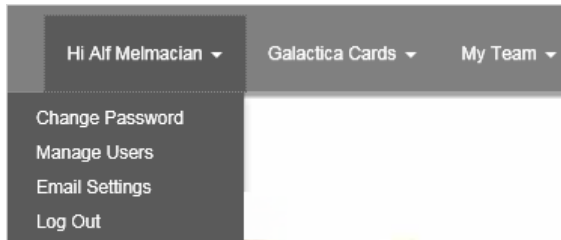


Client Portal Features and Instructions

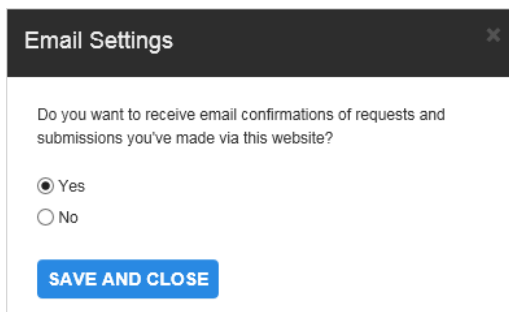
Other Functions and Features of Client Portal

The Header includes important menus.

Hi (username)



Here is where you can Change your Password, Manage Users, change your Email Settings, and Log Out. The Manage Users option allows you to add users who will have access to your Portal. When you click **Manage Users** you will see a list of Contacts that we've entered for your account. If you don't see the name and email you're 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've 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.

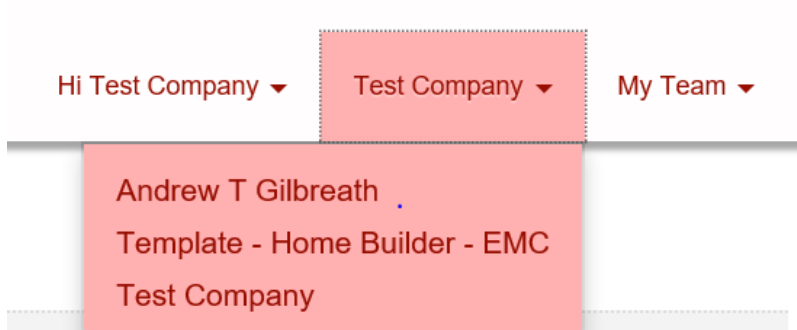




Client Portal Features and Instructions

Multiple Entities

If you have more than one company insured by our agency we can add them all to your Client Portal user id. Once they are added you will click your Business Name in the top right hand corner to toggle between entities as shown below.



If you should have any questions about the client portal please feel to reach out to your Account Manager or Agent for assistance.