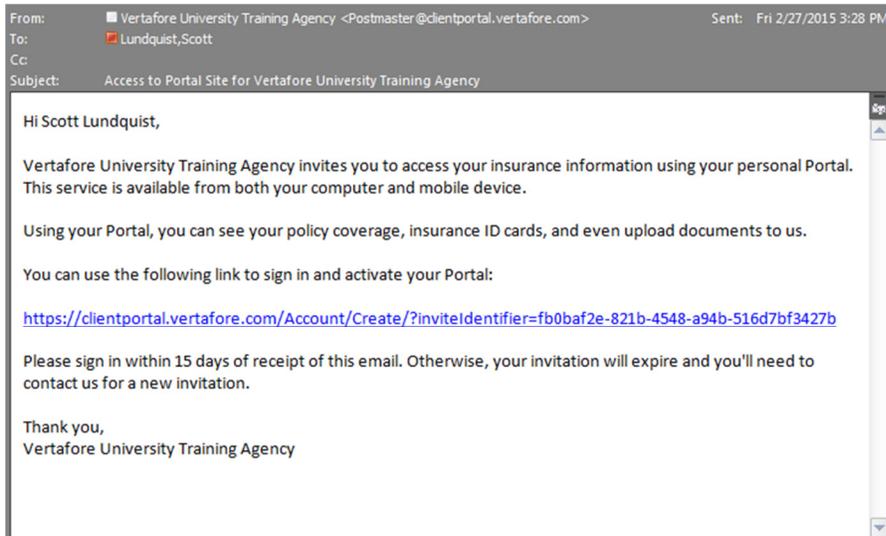


Using the Portal

We are happy to provide you with access to your insurance information anytime via the web. Just give us a call at 952-941-9418 or send an email to info@nesbitagencies.com to request access to the client portal and we will send you an invitation email with information to activate your Portal account. The email looks similar to the one below:



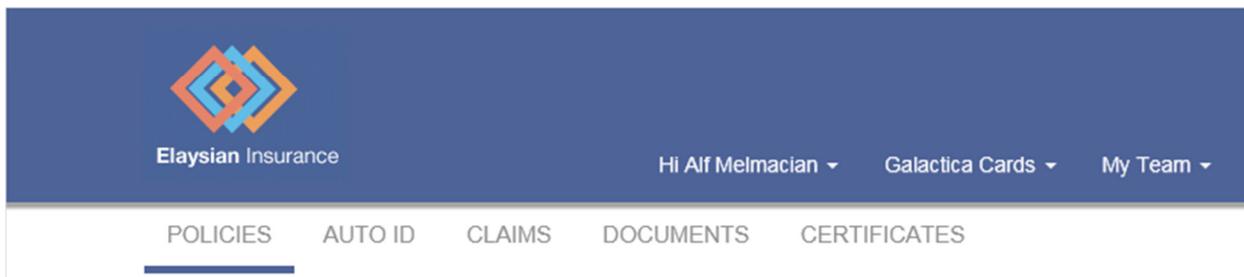
Use the link in the email to open and activate your account for the Portal. If you haven't received the email* or you didn't activate the account within 15 days of receiving the email, contact us for a new account activation email.

**If you haven't received the email in your Inbox, check your Junk email folder.*

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, and Certificates.

What you see may differ depending on your permissions.



The Policies Tab

The policies tab displays all of your current and future policies. Each policy includes the policy number, the type of business (such as Homeowners or Private Passenger), and the policy term, an icon for the insurance company providing the coverage, and a View Summary link, a link to a pdf file, or a Not yet available notation.

The screenshot shows the Elaysian Insurance web interface. At the top, there is a dark blue header with the Elaysian Insurance logo on the left and user information on the right: "Hi Alf Melmacian", "Galactica Cards", and "My Team". Below the header is a navigation bar with tabs for "POLICIES", "AUTO ID", "CLAIMS", "DOCUMENTS", and "CERTIFICATES". The "POLICIES" tab is selected and underlined. Below the navigation bar is a table of policies. The table has a search icon and a sort icon in the top right corner. The table contains three rows of policy information:

Policy Icon	Policy Number	Policy Type	Term	Status	Insurance Company	Action
	# HO9981564	Homeowners	9/9/2014 - 5/17/2017	CURRENT	abc insurance	View Summary
	# BA465666...	Commercial Auto	2/1/2015 - 6/1/2017	CURRENT	abc insurance	View Summary
	# CPK4565...	Package	8/27/2014 - 8/25/2016	CURRENT	oneworld	View Summary

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

POLICY NUMBER: PA 123002

Basic Policy Information

Named Insured		Transaction Information	
Name:	Smith, John	Term:	9/18/2014 - 9/18/2017
Address:	4000 2nd St Bothell, WA 98011	Date:	1/23/2015
Residence:	(987) 654-3210	Type:	PCH
Cell:	(123) 456-7890	Description:	delete veh, add veh
Email:	sss@gmail.com	Company:	ABC Company1

Personal Auto

Drivers

Driver Name:	DOB	Licensed State	Relationship
Regular Customer smith barble	10/12/1963	WA	Insured

Vehicles

Vehicle: 0001 0002 2010 CHEVROLET CAMARO SS/CAMARO SS 2 Door hardtop VIN: NYGARAGED				
Coverage	Limit 1	Limit 2	Deductible Type/Amount	Stated Amount
Bodily injury limit(s)	100000	300000		

Vehicle: 0002 0002 2014 Ford F150 Pickup truck VIN: 1FORDPICKUPTRUCK2222				
Coverage	Limit 1	Limit 2	Deductible Type/Amount	Stated Amount
Bodily injury limit(s)	100000	300000		

To request a change to the policy do the following:

1. Click the policy in the grid.
2. When the Policy Summary page loads, scroll to the bottom of the page and click **Request a Change**.

POLICY SUMMARY
[< BACK TO LIST](#)

General Liability # GL4654654646

Effective Dates: 7/21/2015 - 7/21/2017 CURRENT

Named Insured: Galactica Cards

SafeCo Preferred

[View Summary](#)

Liability Coverage Type: **Commercial General Liability**

Coverage Basis: **Occurrence**

Do you want to make a change to your policy?

If you'd like to request any changes to your policy, please give us as much information as possible and we'll contact you to verify details.

REQUEST A CHANGE

3. On the Request Policy Change window, enter the change you'd like to make. Whether it's to add/remove a driver or increase/decrease coverage limits. Complete the other information and when you're finished click **Submit**.

Policy Change Request ✕

Please provide as much information as possible about the policy change you are requesting.

Your agent may wish to contact you to gather more details. Please provide the following:

Phone Number	Email Address
<input type="text"/>	<input type="text"/>

Best Time of Day to Reach You

Day Evening

Other Details or Comments

A follow up is sent to our agency.

The change request date and status appear on the Policy Summary page. A member of our staff will process the change and let you know when it's done.

POLICY SUMMARY [< BACK TO LIST](#)

 **General Liability # GL4654654646**
Effective Dates: 7/21/2015 - 7/21/2017 **CURRENT** [SafeCo Preferred](#) [View Summary](#)
Named Insured: Galactica Cards

Liability Coverage Type: **Commercial General Liability**
Coverage Basis: **Occurrence**

Do you want to make a change to your policy?
If you'd like to request any changes to your policy, please give us as much information as possible and we'll contact you to verify details.

PENDING: 7/28/2015 test change request

[REQUEST A CHANGE](#)

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.

The screenshot shows the Elaysian Insurance web portal. At the top, there is a dark blue header with the Elaysian Insurance logo on the left and user navigation options: "Hi Alf Melmacian", "Galactica Cards", and "My Team". Below the header is a navigation bar with tabs for "POLICIES", "AUTO ID" (which is highlighted), "CLAIMS", "DOCUMENTS", and "CERTIFICATES". A search bar is located below the navigation bar, containing the text "Search by year, make, model, VIN, or policy #" and a search icon. Below the search bar, a vehicle listing is displayed for a "2015 Honda Accord" with VIN # 987654312. The listing includes the policy dates "7/1/2016 - 7/1/2018" and the policy number "# PA GTC 0003". The name "Henry H Galactica" is listed below the policy information. At the bottom of the listing, there is a "View ID Card" button with a document icon.

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.

The screenshot shows the Elaysian Insurance web application interface. At the top is a dark blue header with the Elaysian Insurance logo on the left and user information on the right: "Hi Alf Melmacian", "Galactica Cards", and "My Team". Below the header is a navigation bar with tabs for "POLICIES", "AUTO ID", "CLAIMS" (which is highlighted with a blue border), "DOCUMENTS", and "CERTIFICATES". Underneath the navigation bar is a light gray bar containing a blue button labeled "START A NEW CLAIM" and a vertical double-headed arrow icon. Below this bar is a list of claims. The first claim entry includes a home icon, the text "# (Pending)", the date "3/17/2015", the text "CLIENTPORTAL TEST", and a red button labeled "SENT TO AGENT".

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.

The screenshot shows a modal window titled "Start a New Claim" with a close button (X) in the top right corner. The main text inside the modal reads: "Please provide the following information. Your agent will follow up with you when the claim is received." Below this text is a section labeled "Policy" with a dropdown menu. The dropdown menu currently displays "Please choose..." and has a downward-pointing arrow icon on the right side.

3. Complete the fields on the Claim form. Some selections you choose from a list while others you type in the information.

Start a New Claim

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

Policy

Homeowners #APHYD0120

Date of Loss

08/12/2015

Time of Loss

: **AM**

Does Loss Involve Injury to a Person?

Yes No

Location of Loss

Cause of Loss

4. When you have finished entering all the information, click **Submit**.

Start a New Claim

Your agent may wish to contact you to verify details. Please provide the following:

Phone Number

Email Address

Best Time of Day to Reach You

Day

Evening

Other Details or Comments

By clicking on the "SUBMIT" button below, you agree not to include any health-related information, whether or not related to your claim, in any information you provide. If you need to disclose health-related information, please contact your Agency directly.

CANCEL **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.
6. When your claim has been reviewed by our staff, the status changes to Open.

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.

The screenshot shows the top navigation bar of the Elaysian Insurance portal. The logo is on the left, and the user's name 'Hi Alf Melmacian' is on the right. Below the navigation bar are tabs for 'POLICIES', 'AUTO ID', 'CLAIMS', 'DOCUMENTS' (which is underlined), and 'CERTIFICATES'. Below the tabs is a header area with 'All Files' and a dropdown arrow. There are two blue buttons: 'ADD DOCUMENT' and 'CREATE NEW FOLDER'. To the right is a search box labeled 'Search for Folders and Documents' with a magnifying glass icon and a double-headed arrow icon.

Use the Actions drop-down to download, move, rename, delete, or Share a link to the document in an email.

This screenshot shows a document entry for 'BA Endorsement.txt'. The document is listed with a file icon, the name 'BA Endorsement.txt', and the text 'OWNED BY CLP Agent User'. To the right, it shows 'CREATED ON 8/12/2015' and '0 KB'. An 'ACTIONS' dropdown menu is open, showing options: 'Download', 'Move', 'Rename', 'Delete', and 'Share in Email'. Below the document list, there is a disclaimer: 'As a condition of your use of the Client Portal, you agree not to upload any document that includes any health-related information. To upload document(s) that include health-related information, please contact your Agency directly.'

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

This is a close-up of the 'ADD DOCUMENT' button from the previous screenshot. The button is blue with white text and is circled in red. It is located next to the 'CREATE NEW FOLDER' button, the search box, and the double-headed arrow icon.

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.



Elaysian Insurance

Hi Alf Melmacian ▾ Galactica Cards ▾ My Team ▾

POLICIES AUTO ID CLAIMS DOCUMENTS **CERTIFICATES**

Search by certificate # or description 🔍 ⌵ ⬆

 # CL1561904579	Certificate of Liability ACORD 25	3 Holder	ACTIVE	 View Master
 # CL1563004604 show to ins.	Intermodal Interchange Certificate ACORD 22		INACTIV	 View Master
 # E1563000036	Evidence of Commercial Property Insurance ACORD 28	None	ACTIVE	 View Master
 # E156800022	Evidence of Property Insurance ACORD 27	None	ACTIVE	 View Master

When you click a certificate in the grid, another web page opens showing all the current certificate holders. You can print an existing certificate, request a certificate for a new holder, or email a certificate.

CERTIFICATE HOLDERS [< BACK TO LIST](#)

 **# CP156200418**
ACORD 23 with Attachment

Vehicle or Equipment Certificate
ACORD
23

1 Holder **ACTIVE**

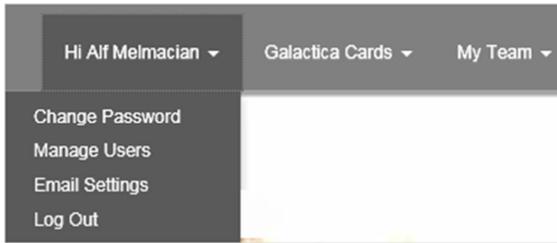
Holders  

Susan Holder 1234 Maple Street Seattle, WA 98105	ISSUED 6/2/2015	JOB #	DESCRIPTION OF OPERATIONS	 View
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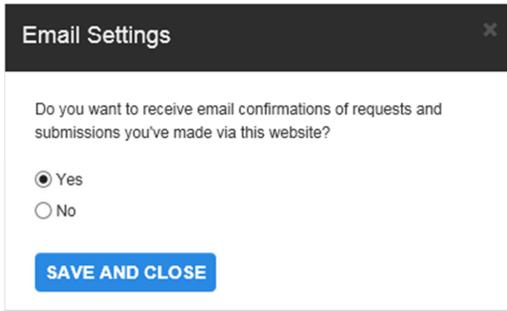
Other Functions and Features of Client Portal

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 is the people in our agency responsible for your account. With this information so convenient, you can easily contact us if needed.

