
















The Policies Tab

The policies tab displays all of your current and future policies. Each policy includes:

- The policy number (Red Arrow)
- The type of business (such as Bonds - Commercial) (Blue Arrow)
- The policy term (Green Arrow)
- An icon for the insurance company providing the coverage (Orange Arrow)
- A 'View Summary' link or a 'Not yet available' notation (Yellow Arrow).

Client Portal				Hi User ABC ▾	test time customer inc. ... ▾	My Team ▾
POLICIES	AUTO ID	CLAIMS	DOCUMENTS	CERTIFICATES	HOW TO USE	ADDITIONAL INFO
						
 # TESTBOND12345 Bonds - Commercial 	6/1/2016 - 6/1/2017 CURRENT		TCOR Insurance Agency LTD			 Not yet available
 # TEST RMF FEE Monoline	2/1/2016 - 2/1/2017 CURRENT		TCOR Insurance Agency LTD			 Adding documents for ...
 # 12354 PICS	1/5/2016 - 1/5/2017 CURRENT		TCOR Insurance Agency LTD			 Not yet available
 # GL TEST Inland Marine (C)	12/9/2015 - 12/9/2016 CURRENT		A. S. I. Lloyds			 View Summary
 # GL 4235 General Liability	11/1/2015 - 11/1/2016 CURRENT		ACCC General Agency			 View Summary

For your Commercial policies, Commercial auto, etc. you'll see a **View Summary** link. Click the link to see the details of the policy similar to the example shown below:

POLICY NUMBER: GL 4235

Basic Policy Information

Named Insured

Firm Name: test time customer inc.
 Address: 396 N Seguin Street
 New Braunfels, TX 78130
 Business: (830) 888-8888
 Cell: (830) 111-1111
 Fax: (830) 999-9999
 Email: layton

Transaction Information

Term: 11/1/2015 - 11/1/2016
 Last Update*: 11/1/2015
 Carrier: ACCC General Agency

Additional Interests

Name	Contact	Type	Interest In
Test w/o AI 1234 Austin, TX 78704		Add'l Insd & Lienholder	
Test 1236764 TEst St Austin, TX 78704		Additional insured	
laskgloihdsf 15464 sdlinsd st Austin, TX 78704		Certificate holder	

General Liability

Liability Coverage Type: Commercial General Liability

Coverage Basis: Occurrence



Coverages

Coverage:	Limit	Ded Amt/Type	Ded Basis	Ded Applies To	Misc Information
General Aggregate	\$1,000,000				
Fire Damage	\$50,000				
Medical Expense	\$10,000				
Products/Completed Ops Aggregate	\$1,000,000				
Personal & Advertising Injury	\$500,000				
Each Occurrence	\$500,000				

Send Edit Requests-

By clicking on a policy in the grid you will see there are many ways to edit your policy. You can add and remove vehicles, add drivers, and submit a request for specific changes.

POLICY SUMMARY [< BACK TO LIST](#)

 **Commercial Auto # CAUT TEST 123**
Effective Dates: 6/30/2015 - 6/30/2016 CURRENT Travelers Insurance  [View Summary](#)
Named Insured: test time customer inc

Coverages (Please note that only main coverages are shown. View your full policy document for all coverages.)

COVERAGE	LIMIT	DEDUCTIBLE
Combined single limit	\$1,000,000	--

Vehicles
There are 3 vehicles on this policy.
[Download vehicle list \(.csv\)](#)

Veh #	Cust Veh #	Year/Make/Model	VIN	Comp	Coll	
00001	00001	1999 Ford F150	35451343541DFSDG354FG	--	--	REMOVE
00002	00002	2001 Honda Accord	3DFG654FG321FG4	--	--	REMOVE
00003	00003	2005 Chevy Silverado	2S1G32DF1G32D1GDFGDG	--	--	REMOVE

[ADD A VEHICLE](#)

Drivers
Please contact your agency for a list of all active and excluded drivers.

[ADD A DRIVER](#)

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: 7/17/2015 testestestestest

[REQUEST A CHANGE](#)

Adding or Removing a vehicle:

1. For adding click the **Add a Vehicle** button.

ADD A VEHICLE

2. The Add Vehicle Request form will appear for you to fill out the vehicle information. The blue boxes are required fields.

Add Vehicle Request

Please provide as much information about the vehicle as possible.

Year	Make	Model
<input type="text"/>	<input type="text"/>	<input type="text"/>
VIN #		
<input type="text"/>		
Title Owner	State Titled In	
<input type="text"/>	<input type="text"/>	
Effective Date	Loss Payee	
<input type="text" value="mm/dd/yyyy"/>	<input type="text"/>	
Additional Insured		
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
Primary Vehicle Use	Average Annual Mileage	
<input type="text" value="Work, pleasure, business, commute, etc."/>	<input type="text"/>	
Garaging Address	\$ Value	
<input type="text"/>	<input type="text"/>	

3. When completed click **Submit**.

4. You will see the status appear in the policy summary as it is sent to the agency.

Vehicles


There are 1 vehicles on this policy.

[Download vehicle list \(.csv\)](#)

Veh #	Cust Veh #	Year/Make/Model	VIN	Comp	Coll	
00001	00001	2012 toyota camry	DSUHFUIDSABFHLSGF	--	--	REMOVE

[ADD A VEHICLE](#)

For removing a vehicle:

1. Click the **Remove** button. 
2. The Remove Vehicle Request form will appear for you to fill out the information. When complete click **Submit**.

Remove Vehicle Request ✕

You are requesting to remove the following vehicle from policy #AUTO

2012 toyota camry

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

Phone Number	Ext.	Email Address
<input type="text" value="() -"/>	<input type="text"/>	<input type="text" value="laytonfrederick@tcomanage"/>

Other Details or Comments

[CANCEL](#) [SUBMIT](#)

3. You will again see another status appear for your request as it is sent to the agency.

Adding a Driver:

1. Click the **Add a Driver** button.

ADD A DRIVER

2. The **Add Driver Request** form will appear for you to fill out all of the necessary information. Click **Submit** when finished. Another status will appear for your request as it is sent to the agency.

Add Driver Request ✕

Please provide as much information about the driver as possible.

Full Name	Date of Birth
<input type="text"/>	<input type="text" value="mm/dd/yyyy"/>

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

Phone Number	Ext.	Email Address
<input type="text" value="() -"/>	<input type="text"/>	<input type="text" value="laytonfrederick@tcormanage"/>

Other Details or Comments

CANCEL **SUBMIT**

To request a change to the policy do the following:

1. When the Policy Summary page loads, scroll to the bottom of the page and click **Request a Change**.

POLICY SUMMARY [< BACK TO LIST](#)



Commercial Auto # CAUT TEST 123

Effective Dates: 6/30/2015 - 6/30/2016 CURRENT

Named Insured: test time customer inc

Travelers Insurance

[View Summary](#)

Coverages (Please note that only main coverages are shown. View your full policy document for all coverages.)

COVERAGE	LIMIT	DEDUCTIBLE
Combined single limit	\$1,000,000	--

Vehicles

There are 3 vehicles on this policy.

[Download vehicle list \(.csv\)](#)

Veh #	Cust Veh #	Year/Make/Model	VIN	Comp	Coll	
00001	00001	1999 Ford F150	35451343541DFSDG354FG	--	--	REMOVE
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[ADD A VEHICLE](#)

Drivers

Please contact your agency for a list of all active and excluded drivers.

[ADD A DRIVER](#)

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: 7/17/2015 testestestestest

[REQUEST A CHANGE](#)

2. 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	Ext.	Email Address
<input type="text" value="() -"/>	<input type="text"/>	<input type="text" value="laytonfrederick@tcomanager"/>

Best Time of Day to Reach You

Day Evening


Other Details or Comments

A follow up is sent to our agency.

3. Below shows your request was successful.

Submission Confirmed

Your information was successfully submitted to your agent. Changes will not apply to your policy until your agent reviews and confirms the request.



4. A member of our staff will process the change and let you know when it's done.