

Dashboard Overview

Insured Portal

From the Dashboard, users are able to get a high-level view of their most recent billing, claim, and policy activity.

Dashboard

Billing Overview 3 of 3 [View All](#)

BILLING STATUS	BILLING METHOD	ACCOUNT NAME	BILLING ACCT #	TOTAL DUE	DUE DATE
DELINQUENT	Direct Bill	[REDACTED]	[REDACTED]	\$1,072.75	09/28/24
CURRENT	Direct Bill	[REDACTED]	[REDACTED]	\$0.00	-
CURRENT	Direct Bill	[REDACTED]	[REDACTED]	\$0.00	-

Recent Claims 2 of 2 [View All](#)

CLAIM #	CLAIMANT	DETAILS	PRODUCT	CLEE CODE	LOSS DATE	REPORT DATE	PRIMARY ADJUSTER
[REDACTED]	[REDACTED]	HIPAA VIOLATION - AN EMPLOYEE'S FORMER TREAT... read more	NET	-	10/18/17	11/07/17 CLOSED	Pending Assignment
[REDACTED]	[REDACTED]	IV TURNED INTO A CEMENT BARRIER SURROUNDING A... read more	CAP	-	04/29/15	04/29/15 CLOSED	Pending Assignment

Recent Policies 3 of 3 [View All](#)

POLICY STATUS	INSURED	PRODUCT	POLICY #	POLICY COVERAGE
FUTURE	[REDACTED]	CAP	[REDACTED]	08/22/24 - 08/22/25
INFORCE	[REDACTED]	APK	[REDACTED]	01/12/24 - 01/12/25

Billing Overview

- A** Billing Overview shows the Billing Status, Billing Method, Account Name, Billing Account #, Total Due, and Due Date for the most recent accounts.
- B** Click the **Billing Account #** link to go directly to that accounts Billing Details page.
- C** Click **View All** to go directly to the Billing summary page to see all billing accounts or click **Billing** in the left-hand navigation menu.

Recent Policies

- G** Recent Policies shows the Policy Status, Insured, Product, Policy # and Policy Coverage for the most recent policies.
- H** Click the **Policy #** link to go directly to the Policy Details page for that specific policy.
- I** Click **View All** to go directly to the Policies summary page to see all policies or click **Policies** in the left-hand navigation menu.

Recent Claims

- D** Recent Claims shows the Claim #, Claimant, Details, Product, CLEE Code, Loss Date, Report Date, and Primary Adjuster for the most recent claims.
- E** Click the **Claim #** link to go directly to the Claim Details page for that specific claim.
- F** Click **View All** to go directly to the Claims summary page to see all claims or click **Claims** in the left-hand navigation menu.