Policies Summary Page Overview

Policies in Insured Portal

From the Policies summary page, users can:

- Download their policies as an Excel file
- Search, sort, and filter their policies to quickly locate specific information
- Access the Policy Details page

To access the Policies summary page, click **Policies** in the left-hand navigation menu.

NOTE: Only Core User will have access to the Policies or Claims pages. Billing-only users will only have access to the Billing page.

A Click **Download as Excel** to download all your policies into an Excel spreadsheet.
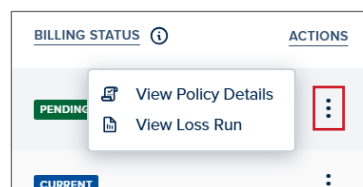
B To search for a policy, enter the Policy # or Insured Name then click **Search**.

C Click **Sort By** to sort policies by any of the column headers.

Click **Filters** to open the filters panel and select from the available criteria (i.e., Policy Status, Product, Policy Coverage dates, Billing Status, or Division).

D Click the **Policy #** link to go directly to that policy's Policy Details page.

E Click **the kabob (⋮)** in the Actions column to **View Policy Details** or **View Loss Run**.

F For users with several policies, click the arrows to navigate between multiple pages.

G Users can also select to show 10, 25, or 50 policies per page.