

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.

The screenshot displays the 'Policies' summary page. On the left is a dark blue navigation menu with the Great American Insurance Group logo and links for 'All Divisions', 'Dashboard', 'Policies' (highlighted), 'Claims', 'Billing', and 'Resources'. The main area has a light gray header with 'Policies' and a 'Start A Claim' button. Below this is a search bar (B) and a 'Download as Excel' button (A). A 'Sort By' dropdown (C) is set to 'None'. A table lists two policies. The first policy has a status of 'INFORCE', insured name 'APK', policy number '123456789', coverage dates '01/12/24 - 01/12/25', and billing status 'PENDING NOE'. The second policy has a status of 'INFORCE', insured name 'CAP', policy number '987654321', coverage dates '08/22/23 - 08/22/24', and billing status 'CURRENT'. The 'Actions' column (E) for each policy contains a kabob menu. At the bottom, there are pagination arrows (F) showing '1/1' and a results per page dropdown (G) set to '10 per page'.

A Click **Download as Excel** to download all your policies into an Excel spreadsheet.

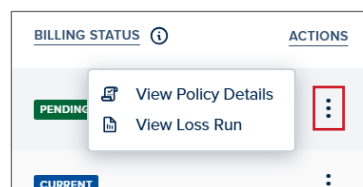
B To search for a policy, enter the Policy # or Insured Name then click **Search**.

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.