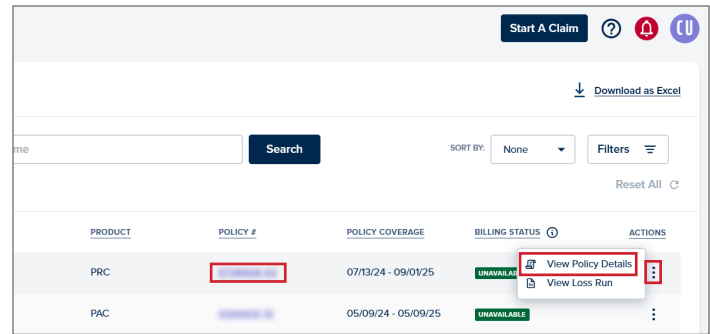


Policy Details > Policy Summary Tab

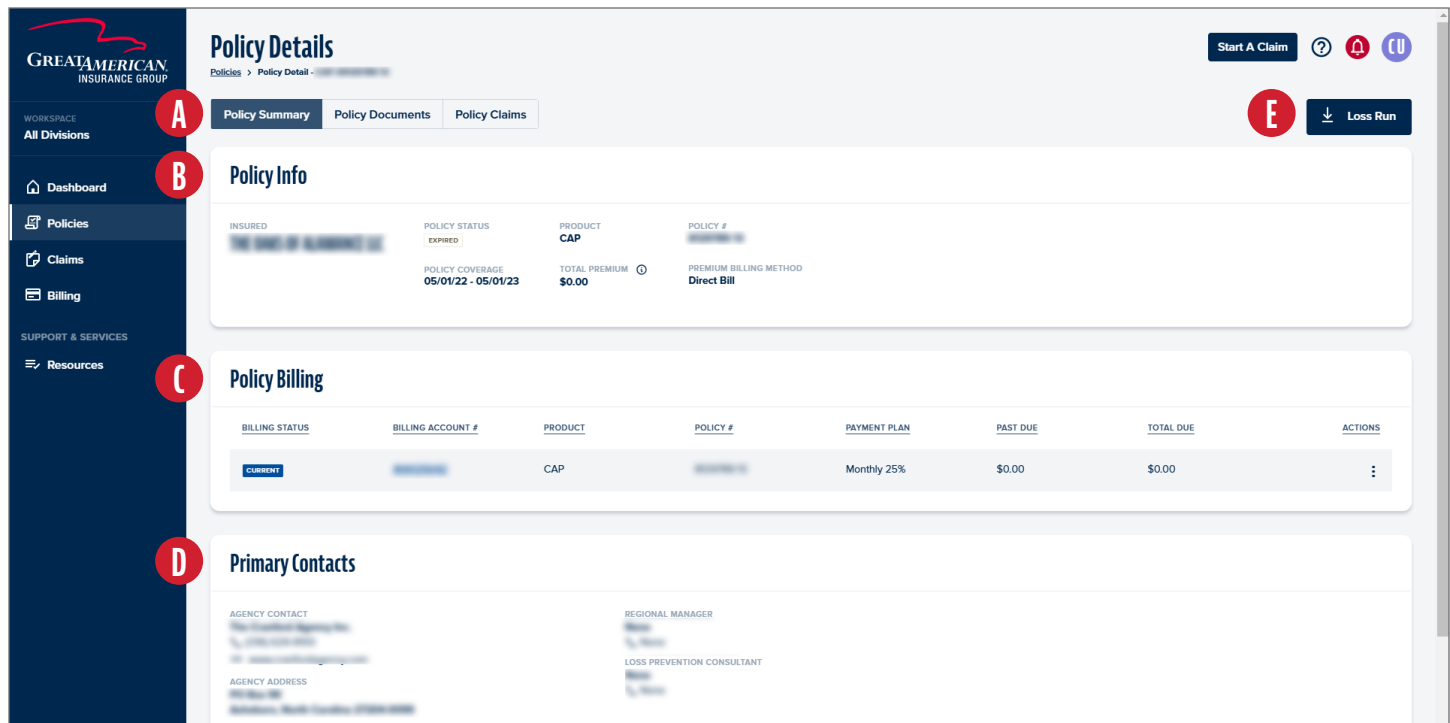
Policies in Insured Portal

Access the Policy Details Page

To access a policy's Policy Details page, click on the **Policy #** link or click the kabob (⋮) icon in the Actions column and select **View Policy Details** from the pop-up menu.



Policy Summary Tab Overview



- A** Click on each tab to view the **Policy Summary** (shown), **Policy Documents**, and **Policy Claims** information.
- B** The Policy Info section shows the Insured name, Policy Status, Product, Policy #, Policy Coverage dates, Total Premium, and Premium Billing Method.
- C** The Policy Billing section shows the Billing Status, Billing Account #, Product, Policy #, Payment Plan, Past Due, and Total Due.
Click on the **Billing Account #** link to access the Billing Details page for that account. You can also click on the kabob (⋮) in the Actions column and select **View Billing Details** from the drop-down menu.
- D** The Primary Contacts section shows contact information for the Policy which may include email and website links.
- E** Click **Loss Run** to download the Loss Run report as an Excel document.