

NIA Broker Portal Guide

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Access the NIA Broker Portal

To login, go to <u>www.insurancefornonprofits.org</u>, click the **Secure Login** button, and enter your username and password.

To request credentials for the first time, click Need a Log in. You will receive a response within one business day.

To reset your password if needed, hover over **Secure Login** button and click on **Forgot Your Password**.





Access Your Broker Summary



View Broker Information (continued)

Click on each of the tabs available for a broker overview. This information can also be accessed through the black menu heading bar.



View Underwriting Team

Underwriters listed at the bottom of the screen on the Summary Tab in the ANI/NIAC Contact Info tile are for general underwriting questions and will quote renewals. New business is on an underwriting rotation.



Who's Who at Your Agency (Your Agency Contacts)

View Your Agency's Primary Contacts

Navigate to the Agency Info tab while in the Broker Overview.

The individuals listed at the top of the webpage are your agency's main designated contacts aka Default Contacts. Designated Contacts can be changed by any agency contact(s) with admin access to the portal by clicking the **Edit** buttons.

- The following Default Contacts exist: 1 – Primary (aka Underwriting) 2 – Billing Contact 3 – Claims Contact
- 4 AR Contact



Who's Who at Your Agency (Your Agency Contacts) (continued)

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Each agency contact will be listed under Contacts.

Your agency contacts with general access (listed on the portal as "access") have permission to view information and update Member/Policyholder information.

Your agency contacts with admin access have the same general access permissions and they can add additional agency contacts and update agency information including designate commission payment method (EFT or check). Commission payment method can be edited under the Broker

Understanding Broker Access



Main Brokerage Info

Default/Billing

Address

Phone

Email

Website

Questions about the NIA Broker Portal? Contact Broker Services: Phone Number: 831-459-0461 Email: BrokerServices@Insurancefornonprofits.org

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333 Front Street

(831) 621-6013

myarnell@niac.org

view all broker info >>

www.insurancefornonprofits.org

Suite 200 Santa Cruz, CA 95060

Edit

secure.insurancefornonprofits.org/AMSCentral/BrokerOverview.cfm

+

Edit

Edit

Edit

Primary/Billing Contact

Name

Phone

Name Phone

AR Contact

Claims Contact

Add / Delete an Agency Contact

Individuals with admin access can add/delete an agency contact. While in the Broker Overview > Agency Info tab, locate the Contacts tile.

Click "Add Contact" to add a contact.

Click "Delete" to delete a contact.

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		- Producer lafe			Drimon	(Pilling Contract		. Underwriter , Underwriter Assistan , Underwriter Admin. AR Contact	t	
	Def	ault/Billing fress:		333 Front Street Suite 200 Santa Cruz, CA 95060	Name: Phone:	Johning Contact	Edit	Upcoming Webinars		
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	We	bsite:	www.insu	rancefornonprofits.org	Phone:			October 4, 2021 - Top Nonprofit Employment Law Mistakes (and How to Avoid Them) NONPROFITS OWN® Directors & Officers (D&O):		
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	Cor	ntacts Q Search	by Contact	👄 inactive 🏾 🏾	access 🚨 a	dmin Add Contact	Acct Assign.	View More		
	8	Name Dottie	<u>Title</u> None Available	Email dlechtenberg@insurancefo	monprofits.org	Action Edt Delete	Assign			
		Steven Moody	Compliance Director	smoody@insurancefornong	profits.org	Edit Delete	Assign			
		Michael Pramuk	None Available	mpramuk@insurancefornor	profits.org	Edit Delete	Assign			
	0	Kevin Huth	Numero Uno IT Project Manager	khuth@insurancefornonpro	fits.org	Edit Delete	Assign			
		Melissa Yarnell	None Available	myamell@niac.org		Edit Delete	Assign			
		Sofia Safranek	Marketing Communications Specialist #	ssafranek@insuranceforno	nprofits.org	Edit Delete	Assign			
	×	Tina Mazzei	Project Manager	tmazzei@insurancefornonp	rofits.org					
		Thomas Smith	Manager	tnomassmith@nonprofit.	com	Edit Delete	Assign			
	Brol	ker Reference C	orner:					Search		
	-			-		-				

Add / Delete an Agency Contact (continued)

Enter the information for your new Agency Contact and designate whether the contact will have Admin or General access to the portal. Hover over each role to learn about the permissions for each role.

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Fill out the I our systems	aformation below to add a new contact. The con	ntact will be available once they've been imported	Into NONPROFITS *	
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	* Username: * Role: Add Contact NOTE: Broker Administrator has ability to edit took An agency may nave multiple Broker Administrator	Broker Administrator Broker Cancel er info and additemove brokerage users. F Gesteel	Upcoming Web/inars March 8, 2022 Califonia Family Righta Act Aryl 17, 2020 - Califonia Timekeping and Payroll Compliance Aryl 21, 2020 - Califonia Anaret Collars	
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My Account Broker Over Policies & E	IS Payments View Payments and Commissions Indersements Make a Member Payment Make a Agency Payment	Claims Reports How to Submit a Claim Broker Activity F View a Claim Member Usage Claims Forms Loss Purings	Reports Summary	

Give a Broker Contact Access to NIA Broker Portal

There are three easy steps to give an individual at your agency access to the Broker Portal.

 Click on the Edit button next to the Agency Contact's email address.





Give an Agency Contact Access to NIA Broker Portal (continued)

 Assign a username. Username format is FirstnameLastname.
 If you receive an error message that the username is unavailable add your broker ID# at the end of the username, i.e.
 FirstnameLastname00000.
 Choose the level access (Broker Administrator or Broker (general). Click the Save Web User Info button.

	About Contact Events Ht, Dotte
A heed for insurance. A heart for receptofits. My Accounts Applications Billing Claims Forms Reports Working with Us Mer Contact Info - Manage Web User Info	nber Resources Blog Need Help? Nonner Status Nonner Status
Update the information below. Web User Info * Username:	Logged In: Broker # My AN/IAIC Contacts: Underwriter Underwriter Assistant Underwriter Admin.
Password: Auto-generated for new users * Role: Role: Role: Role: Role: Role: Role: R	Upcoming Webinars September 28, 2021 - Pre- Employment Inquities through the Hiring Process
	October 4, 2021 - Top Nonprofit Employment Law Mitateke (and How to Avaid Them) NONPROFITS OVINED Directors & Officiens (D&O): Lability October 5, 2021 - Key Employment Policies for California Employers
Broker Reference Corner:	View More Search

Reassign Broker Contacts to Member/Policyholder Accounts



October 5, 2021 - Key Employment Policies for California Employers

Direct Bill Information



Questions about the NIA Broker Portal? Contact Broker Services: Phone Number: 831-459-0461 Email: <u>BrokerServices@Insurancefornonprofits.org</u>

Member/Policyholder Overview

To locate member accounts, hover over **My Accounts** and click on **Policies & Endorsements**.

When you click on the link for a **Member/Policyholder** you will be directed to the **Member Overview**.

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						October 5, 2021 - Key Employment Policies for California Employers			
						View More			

Member/Policyholder Overview (continued)

The Member Overview contains seven tabs for the account: Summary, Policy Info, Billing, Member Info, Quotes, Renewals, and Claims.



View Your Agency's Renewals

Hover over **My Accounts** and click on **Renewals**.

Renewals are divided into four categories. Please be sure to check all tabs for if you do not immediately see your renewing account.



Bind a Quote

Hover over **My Accounts** and click on **Quotes**. Locate the quote you want to bind and under Available Actions, use the dropdown to Select an Action.

If the account contains multiple lines of business, you must begin the binding process with the General Liability quote.

You will then go through a series of choices in the bind process including binding other lines of business, choosing Direct Bill or Agency Bill, and providing subjectivities.



Policy Changes

Endorsement Requests (Excluding General Liability Additional Interest Endorsement Requests)

Hover over My Accounts and click on Policies & Endorsements which will route you to a list of your agency accounts. Click on the link to the Member you wish to add the policy change. You will be routed to the Member Overview. Click on the Policy Info tab and click on **Submitting Endorsement Request.** You will see instructions for submitting endorsement requests. You will also be able to download a Special Event Request Form.

General Liability Additional Interest Endorsement Requests

Hover over My Accounts and click on Policies & Endorsements which will route you to a list of your agency accounts. Click on the link to the Member you wish to add the policy change. You will be routed to the Member Overview. Click on the Policy Info tab and click on **GL Blanket** Additional Interest Endorsements.

		Mem	ber Over	view			
Policy Info	Billing	Member Info	Quotes	Renewals	Claims		
Liability Expires: 06/13/2017 Image: Second structure Endorsement Requests Image: Second structure Image: Second structure Image: Second structure Image: Second structure <td< th=""></td<>							
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Using the GL Blanket Al Endo Form

You can either add a new Additional Insured or add another form to an existing Additional insured:

visting Additional Insureds mus odifications or deletions.	ddition of new GL Blanket A t be done by our underwritir	Additional Insured. Ang staff. Please con	Any modifications to or deletions of tact your underwriting team to process
			* require
General Liability Blanket A	Additional Insured Info	rmation	
• (* Broker: * Named Insured: General Liability Policy:	2016	First, select the
Insured Information			policy number.
Customer: 06974 - Disability Policy: 2016-06974 From: Confirmation of Blanket Cove	Rights Education and Defe 03/04/2016 To: 03/04/20 erage	ense Fund, Inc. 17	Status: Active Coverage as of: 02/16/2017
This system can only be used Insureds forms but only if that Insured Form.	d to add specific Additional t Additional Insured would o	Insureds names into therwise already be	o one of the Blanket Additional covered by that Blanket Additional
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This policy will be amended to your representation of the exist	o include the specified indivision of the Additional Institution is incorrect, you agree	idual or entity as an ured requirement wit	Additional Insured, in reliance on thin a written contract, lease or
because of the Additional Insu policy.	ured status which otherwise	would not have bee	any payment or obligation made en extended under the terms of this
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agreement. If your representations because of the Additional Insureds policy. * I confirm the a General Liability Blanket Add * Additional Insureds: To select an existing Additional Insured, select a name from this list. * Effective From: * Effective From: * Effective To: * Applicable Form: As Respects: (150 characters remaining) Additional Insured Info * Additional Insured Name: (150 characters remaining) * Address Line 1: Address Line 2:	Type Your Initials Here: above statement is true: litional Insured Detail Add New Additional Insu 03/04/2017 Select Form	red Below	Any payment or obligation made en extended under the terms of this Read and accept the legal agreement. Select to either add a new AI or add a form to an existing AI. Select a form to add, and then fill in the rest of the form. Finally click the button to submit the Endorsement.

Adding a New Additional Insured

To add a new Additional Insured, select the **Add New Additional Insured Below** option in the **Additional Insureds** field:

Then fill out the **Additional Insured Info** section below with the new Als information:

General Liability Blanket Additional Insured Detail						
* Additional Insureds: To select an existing Additional Insured, select a name from this list.	Add New Additional Insured Below					
* Effective From:						
* Effective To:	06/13/2017					
* Applicable Form:	Select Form					

Additional Insured Info	
* Additional Insured Name: (150 characters remaining)	
* Address Line 1:	
Address Line 2:	
* City/State/Zip:	Select: 🗸

Selecting an Existing Additional Insured

If you want to add a form to an existing Al, you can select them from a list of Als already associated with this policy:

* Additional Insureds: To select an existing Additional	Bank of Al Endo	
Insured, select a name from this list.	Add New Additional Insured Below	
* Effective From:	Bank of Al Endo	
* Effective To:	03/01/2017	
* Applicable Form:	Select Form	•
As Respects: (150 characters remaining)		When you select an existing AI, it will
Currently Associated Additio	nal Insured Forms	display other forms
CG 20 18 04 13 - Mortgagee,	Assignee or Receiver	currently attached to the AI for this policy.
	Add Form to Additional Insured Cance	D

Understanding the Confirmation Page

Once you've submitted the form, you will receive a confirmation email and be taken to a screen that displays the information you just entered:

			* require
General Liability Blanket	Additional Insured Infor	mation	
•	* Broker: * Named Insured: General Liability Policy:	2016	Polestind In. Eddin Property
nsured information			
Customer:	02/04/2040 T-+ 02/04/20/	17	Status: Active
Policy: 2016-01917 From:	03/01/2016 10: 03/01/20	17	Coverage as of: 02/16/2017
Confirmation of Blanket Cov	verage		
This system can only be use Insureds forms but only if tha Insured Form.	d to add specific Additional It Additional Insured would o	nsureds names in therwise already b	to one of the Blanket Additional e covered by that Blanket Additional
By typing in your initials and Additional Insured as an Addi in effect, or becoming effectiv	checking the box below, you itional Insured on this policy, ve during the term of this pol	are confirming tha under a written co licy.	at this Member is required to name the ontract, lease or agreement currently
This policy will be amended t your representation of the exi agreement. If your representa because of the Additional Ins policy.	o include the specified indivi stence of the Additional Inst ation is incorrect, you agree ured status which otherwise	dual or entity as a ured requirement w to indemnify us for would not have be	IN Additional Insured, in reliance on vithin a written contract, lease or r any payment or obligation made een extended under the terms of this
	Type Your Initials Here:	КН	Once you submit the
* I confirm the	above statement is true:	Yes	endorsement, you will be taken to a confirmation
Seneral Elability Dialiket Au			information you've just
* Additional Insureds:	See Additional Insured Info	Below	entered.
* Effective From:	02/16/2017		
* Applicable GL Form:	CG 20 18 04 13 - Mortgage	Assignee or Pr	aceiver
As Respects:	Loan #1234	, , , looighee of ric	
(150 characters remaining)			
Additional Insured Info			
Additional Insured Name:	Bank of AI Endo		To add another AI, you can
* Address Line 1:	1234 Any Street		click the "Add Another
Address Line 2:	,		you're done, you can click
* City/State/Zip:	Santa Cruz, California 950	60	the "Done" button and be
	anal Insurad Forms		taken back to the Member Overview for this member
Currently Associated Addition	Sharmsuleu Forms		

Understanding the Endorsement Completion Email

Finally, after your request is processed (typically within a few minutes) you should receive an email with a link to your endorsement. Clicking the link to the endorsement will take you to the General Liability endorsement page for that member.

NOTE: If there is only one endorsement, the endorsements page will simply load that endorsement. If there is more than one endorsement, it will display a list of all General Liability endorsements for that member. The newest endorsements will display at the top of the list.

From:	Web Import
To:	Web QA
Co	🖉 Kevin Huth
Subject:	ANI General Liability blanket Additional Insured Endorsement Change Website Action Alert
This is an a	automatically generated confirmation email created by the ANI website.
-	
The follow	ring action was submitted to the ANI website for the following Member:
and the second	
Requeste Received	d By: at: 2/15/2017 10:05:09 AM
If you hav	e any questions or concerns about this, please reply to this email.
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Best Rega	rds,
Webmast Alliance M Alliance of Nonprofit P.O. Box 8 Tel: (800) Fax: (831) www.inst	er Iember Services (AMS) serving I Nonprofits for Insurance, Risk Retention Group (ANI) s Insurance Alliance of California (NIAC) 507 Santa Cruz, CA 95061-8507 359-6422 459-0853 rancefornonprofits.org

Claims & Loss Data

To view loss runs, hover over the **Claims** tab on the Black menu bar and select **Loss Runs**. You'll be able to look up loss runs using the Member ID.



View NIA Policy Forms

To view NIA Policy Forms, visit the Broker **Forms** Library. Hover over Forms and click on Broker Forms Library.



View NIA Policy Forms (continued)



The NIA Online Application

Brokers may use the <u>NIA Online</u> <u>Application</u> for all eligible nonprofits.

The <u>NIA Online Application User</u> <u>Guide</u> walks you through the entire process from how to access the online application, collaborate with your nonprofit applicant, and submit the completed new business submission to NIA.

Review "Section 2 – Access the Application" of the <u>NIA Online</u> <u>Application User Guide</u> for instructions on how to access the online application and review eligibility for your nonprofit applicants.

My Accounts	Applications	Billing Cl	aims Forms	Reports	Working with Us	Member Resources			
(Online Applicatio	on Andrea	nline Applic	ation					
	Supplemental A	pps]			
	Coverage Marke	etplace							
Follow the instructions on this page before starting the application									
All Bro	kers: Start He	re							
1. Are yo	u adding a line o	of business to	an existing acco	unt?					
2. Does t	he nonprofit fit a	any of the follo	wing situations?	•					
 It is It is It ha It ha It ha If you ans applicatio 	a foster family ag a fiscal sponsor is multi-chapter of is six or more loca swered yes to eith <u>ns</u> instead.	ency rganizations ations ter question, dc	not use the Onli	ne Applicatior	to apply. Use <u>these</u>	<u>individual</u>			
lf you ans	swered no to both	questions, the	Online Applicatio	n is for you:					
			Online Applic	ation					
		F	or New Busines	s Only					
		<u>Begin</u>	<u>New Online A</u>	<u>pplication</u>					
Download a l	PDF guide to the	NIA Online App	lication here.						

NIA PDF Supplemental Applications

If your account is not eligible for the <u>NIA Online Application</u> (see details on page 23), there are new business PDF <u>NIA Supplemental Applications</u> available which can be submitted along with the corresponding Acord applications for all lines of business.

The <u>NIA Supplemental Applications</u> are available on the NIA Broker Portal.

Hover over Applications and select Supplemental Apps (pictured here).

You will arrive at the <u>New Submissions</u> page. Begin at "Start Here" to ensure you use the correct application for your nonprofit application.

Send all PDF submissions to submissions@insurancefornonprofits.org.

Make sure your submission includes the following:

- Full name and email address for a contact at the nonprofit
- FEIN
- Acord applications (as stated within each NIA supplemental application)
- Loss runs

My Accounts	Applications	Billing	Claims	Forms	Reports	Working with Us	Member Resource
-	Online Applicati	on					
	Supplemental Apps		lew Submissions				
	States Covered	. "					
Start Here	Coverage Mark	etplace					
 Use the 	NIA Online Anni	ication for	most of you	r new subr	issions		
 Use the 	se other individu	al applicati	ions only if	the nonpro	fit has six or r	nore locations, is a fo	oster family
agency	has multiple cha	pters, or h	as fiscal sp	onsors.			,
Other Ind	ividual Applic	ations					
You only ne	ed to fill these o	out if:					
The not	nprofit has six or	more locat	ions, is a fo	ster family	agency, has n	nultiple chapters, or h	nas fiscal
sponso	rs.						
 The <u>NI</u> 	A Online Applicati	on told you	u to come h	ere.			
Use the appl	ications below fo	r all lines (of business	and class	es of busine	ss for which you are	requesting
coverage.							
Below is a ch	nart to guide you	through wh	nat a compl	ete submiss	ion to us look	s like, based on the l	line of business
requested.							

Please note: A nonprofit must have Commercial General Liability with us to qualify for other lines.

Commercial General Liability (CGL) California <u>odf / word</u> Outside California <u>pdf / word</u> ACORDs: 125 & 126 Base Limit: \$1mil/\$1mil

Working with NIA

Clicking on the **Working with Us** button will take you to a section of our website with everything you need to conduct business with us smoothly and efficiently.

In this section of the website, you will find links to useful brochures about our appetite, where we write business, the NIA Broker Portal, coverage details, risk management resources available to NIA members, and more.



I'm new to NIA. What is this all about?

With competitive commissions, an industry-leading 95% renewal rate, and streamlined processes, NIA is committed to making it easy for brokers to do business.

The basics:

- <u>Top 10 Reasons to Think of NIA First for Your 501(c)(3)</u>
 <u>Nonprofit Clients</u>
- It's easy for brokers to recommend NIA to their clients.
- Exposures, Concerns, and Solutions
 Are nonprofits poor risks? Not to a knowledgeable
 insurer.
- Top 10 Reasons 501(c)(3) Nonprofits Rely on NIA Learn the defining features that make NIA the best insurer for 501(c)(3) nonprofits.
- Everything You Wanted to Know About Risk Retention Groups
 Groups

RRGs are authorized by an act of Congress and have been around for decades.

Get appointed:

Become An NIA-Appointed Broker
 To request a direct appointment, tell NIA a little about
 your brokerage.

Coverages:

- <u>Coverages List</u> See the menu of NIA's nonprofit insurance offerings
- <u>NIA's Innovative Coverages, a Timeline</u>
 How has NIA been a thought leader in the insurance industry? View the timeline to find out.

About NIA:

- Letter from the CEO NIA CEO Pamela Davis recognizes that as a broker representing nonprofits, you have a unique responsibility.
- Financial Strength
 A 30+ year history of success, and rated <u>A (Excellent) by</u>
 AM Best.
- <u>NIA's Enduring Commitment to the Nonprofit Sector</u> Since the beginning, NIA has been dedicated to the protection and growth of the 501(c)(3) nonprofit sector.

Member Resources

Our Member Resources are a great example of how we support the health and sustainability of nonprofits by providing free and highly discounted Memeber Resources. You can explore them under the **Member Resources** tab. Additional information can be accessed under Working With Us > For Nonprofits.



Broker Reference Corner

At the bottom of the Broker Portal, you'll find quick links in the **Broker Reference Corner**, including **Forms** and **Working with Us**.

Video Help will assist you on how to perform certain functions on the NIA Broker Portal.

Click **Broker Webinars** to learn about upcoming learning opportunities.



Questions about the NIA Broker Portal? Contact Broker Services: Phone Number: 831-459-0461 Email: <u>BrokerServices@Insurancefornonprofits.org</u>