NIA Broker Portal Guide

Table of Contents
02 Access the NIA Broker Portal
03 Access Your Broker Summary
03 View Broker Information
04 View Underwriting Team
05 Who's Who at Your Agency (Your Agency Contacts)
07 Add / Delete an Agency Contact
09 Give a Broker Contact Access to NIA Broker Portal
10 Give an Agency Contact Access to NIA Broker Portal
11 Reassign Broker Contacts to Member/Policyholder Accounts
12 Direct Bill Information
12 Agency Bill Information
13 Member/Policyholder Overview
14 View Your Agency’s Renewals
15 Bind a Quote
16 Policy Changes
21 Claims & Loss Data
21 View NIA Policy Forms
23 New Business Applications
25 Working with Us
27 Member Resources
27 Broker Reference Corner
Access the NIA Broker Portal

To login, go to [www.insurancefornonprofits.org](http://www.insurancefornonprofits.org), 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**.

Then, use the black menu heading bar to begin navigating the NIA Broker portal.
Access Your Broker Summary

Hover over My Accounts, then click on Broker Overview.

View Broker Information

To see broker-specific information, hover over My Accounts and click on Broker Overview. You will land on the Summary Tab.

Please note the Current Activity and Quick Links sections to quickly access commonly requested information.
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)

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 Overview > Summary tab.

Understanding Broker Access

- Dottie Lechtenberg has admin access
- Steven Moody and Kevin Huth have general access
- Tina Mazzei was deleted as a Broker Contact
- Thomas Smith doesn’t have an icon and hasn’t been given access
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.
NIA BROKER PORTAL GUIDE

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.
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.

1. Click on the **Edit** button next to the Agency Contact’s email address.

2. Click the **Edit** button in the Web User Info tile on the next screen.
3. 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.
Reassign Broker Contacts to Member/Policyholder Accounts

1. From the Broker Overview > Agency Info tab, navigate below to contacts and click on Acct. Assign.

2. On the next screen, use the dropdown menus to select another Broker Contact. Be sure to click the Update button. You will receive an email confirming the Member/Policyholder Account reassignment.
Direct Bill Information

Hover over My Accounts, click on Broker Overview, then Direct Bill tab.

Agency Bill Information

Hover over My Accounts, click on Broker Overview, then Agency Bill tab.
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.
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.
Policy Changes (continued)

Using the GL Blanket AI Endo Form

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

Selecting an Existing Additional Insured

If you want to add a form to an existing AI, you can select them from a list of AIs already associated with this policy:
Policy Changes (continued)

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:
Policy Changes (continued)

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.
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)

You can click the symbol to the upper right to expand the view on each form.

NIAC - California Risks

ANI - All Other States

Questions about the NIA Broker Portal? Contact Broker Services:
Phone Number: 831-459-0461
Email: BrokerServices@Insurancefornonprofits.org
insurancefornonprofits.org/broker-portal-guide
New Business Applications

Locate the black menu heading bar and click on Working With Us. In the green section, click on Submitting a Complete Application.

![Image of NIA Broker Portal Guide](image-url)
New Business Applications

The first page will give you a summary of what is required in addition to the application(s).

The section page provides a listing of supplemental and acord applications required by line of business along with minimum premiums.

California - NIAC apps
All other states - ANI apps
Working with Us

In **Working with Us**, you’ll find everything you need to conduct business with us smoothly and efficiently.
Working with Us is divided into multiple sections including Overview, Working with Us, Our Coverages, For Nonprofits. The top of the page consists of NIA overview & history and useful information for brokers including our appetite, where we write business, submitting a complete application.

As you scroll down, Product Highlights and information For Nonprofits is also available.
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 Member 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.