



NIA Broker Portal Guide

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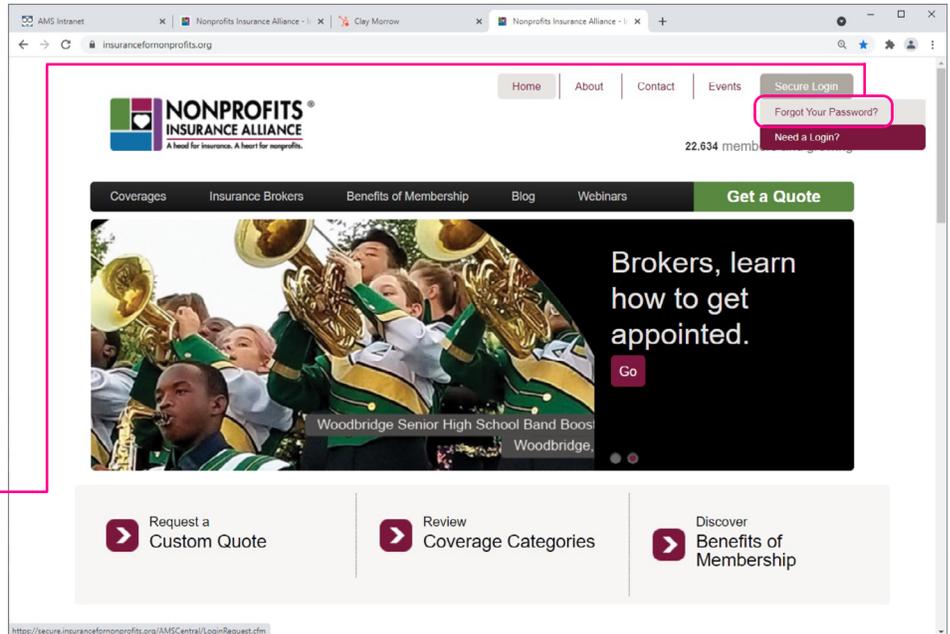
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Access the NIA Broker Portal

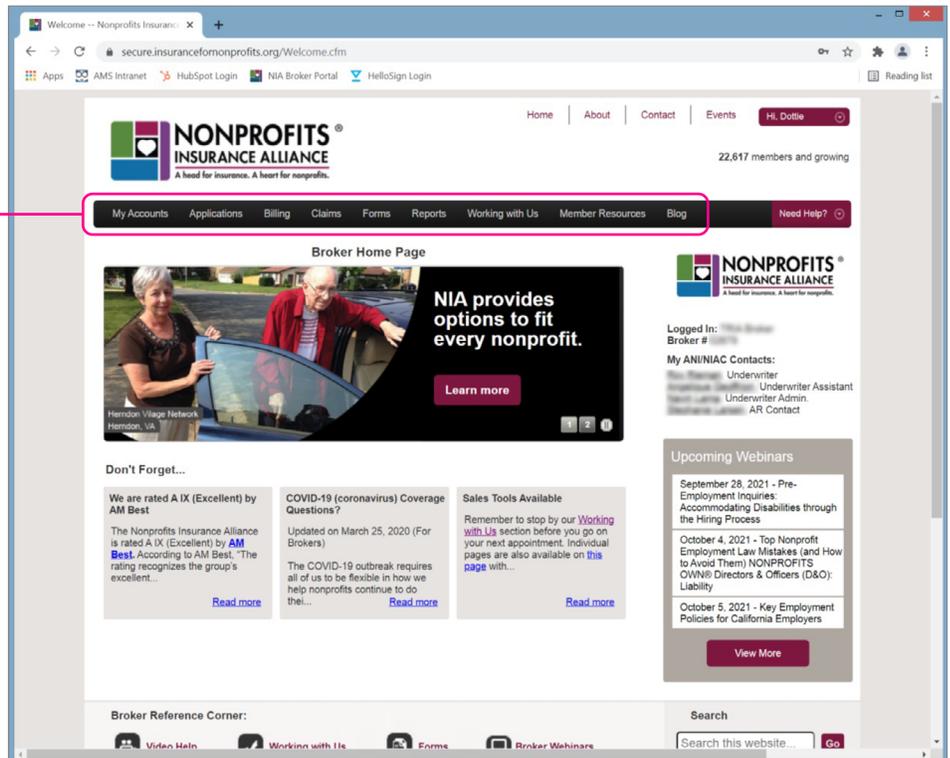
To login, go to www.insurancefor nonprofits.org, click the **Secure Login** button, and enter your username and password.

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**.

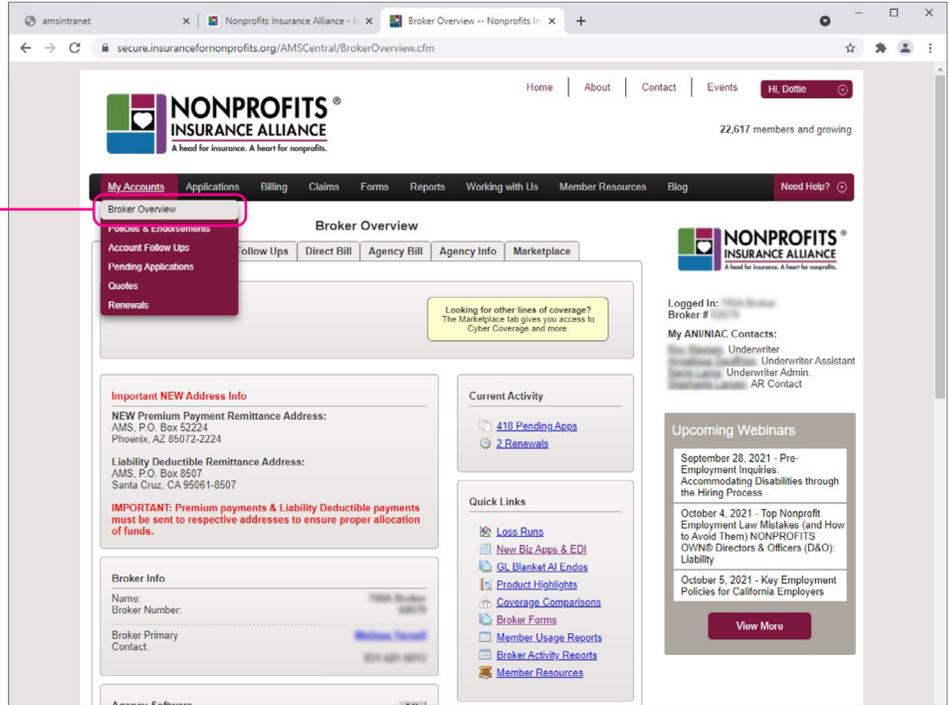


Then, use the black menu heading bar to begin navigating the NIA Broker portal.



Access Your Broker Summary

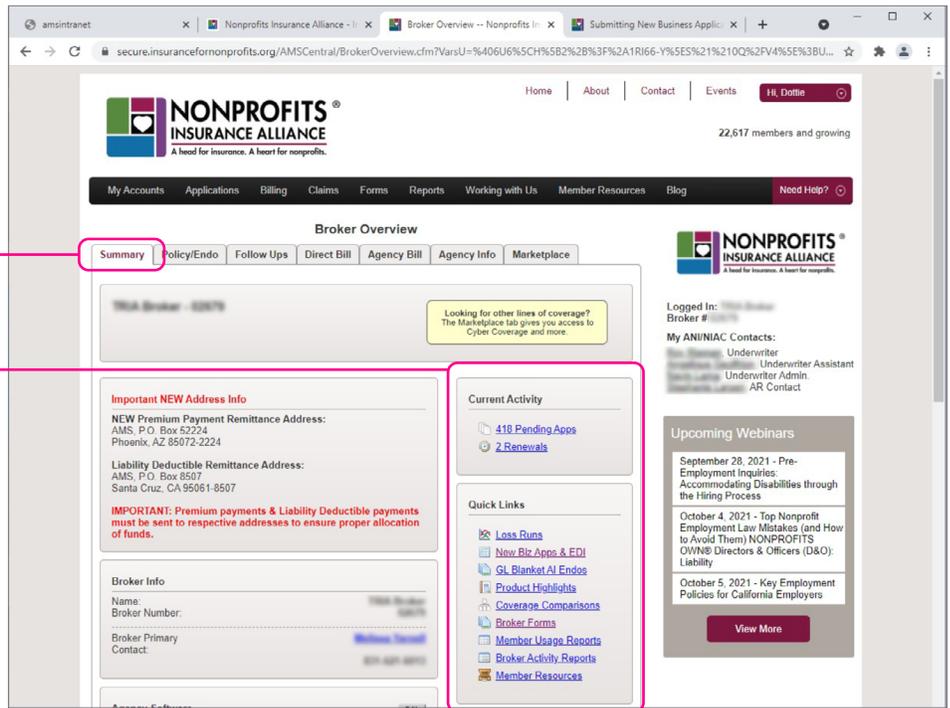
Hover over **My Accounts**, then click on **Broker Overview**.



View Broker Information

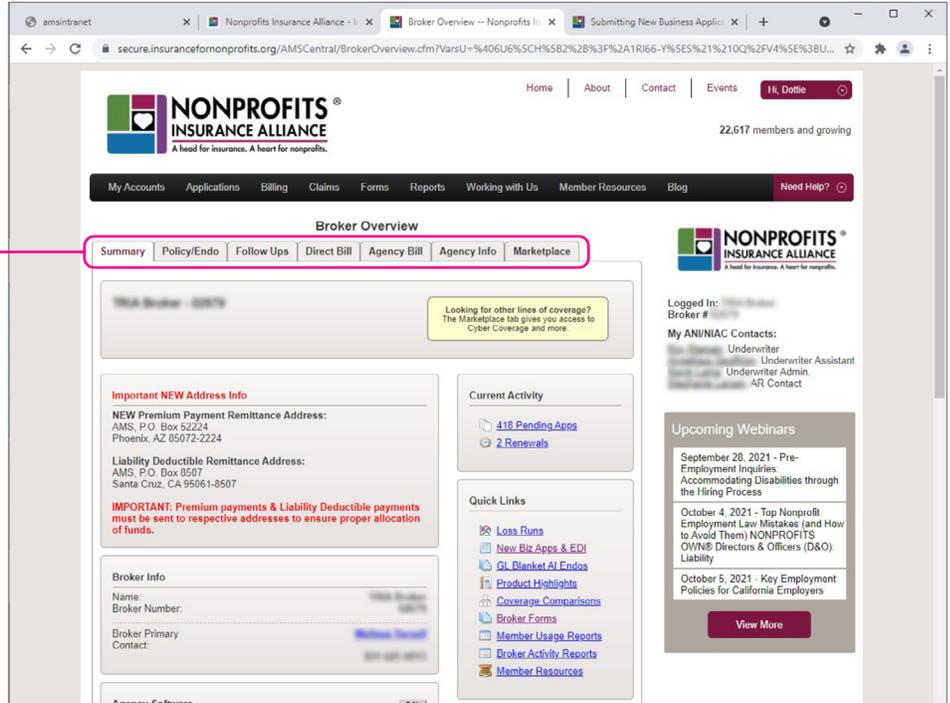
To see broker-specific information, hover over **My Accounts** and click on **Broker Overview**. You will land on the **Summary Tab**.

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



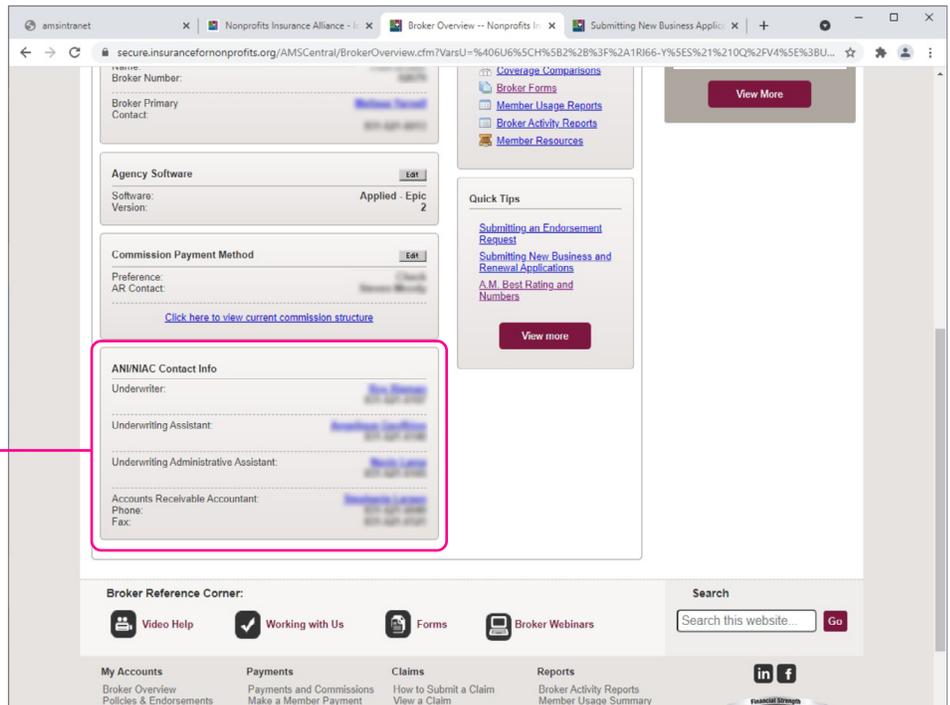
View Broker Information (continued)

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)

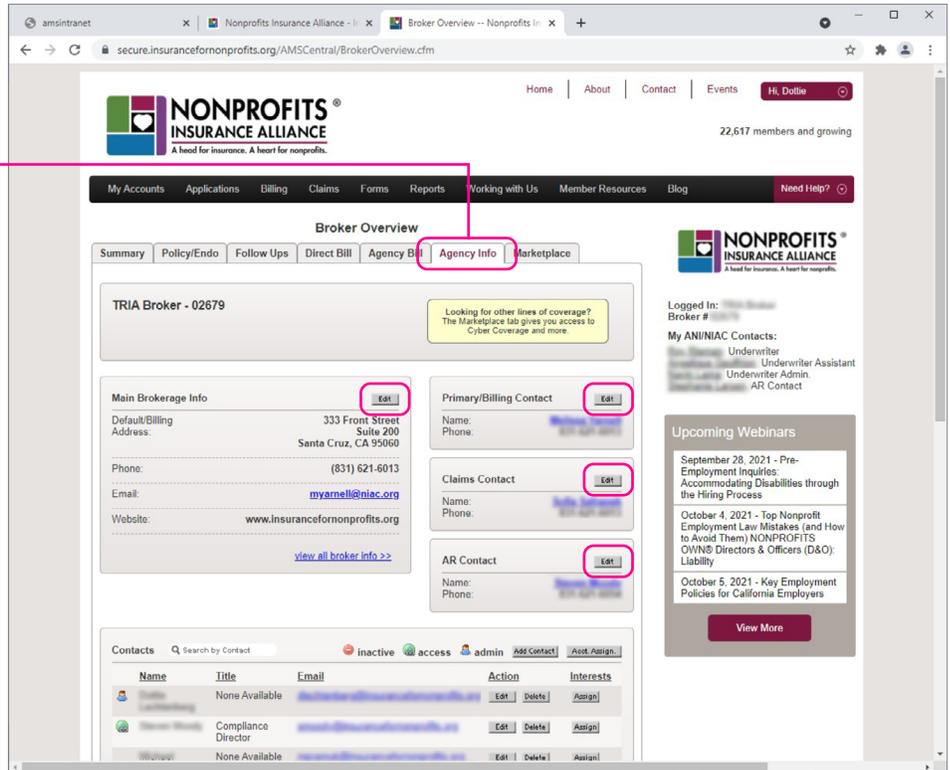
View Your Agency's Primary Contacts

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

The screenshot displays the 'Broker Overview' page in a web browser. At the top, there are three tabs: 'amsintranet', 'Nonprofits Insurance Alliance - In', and 'Broker Overview -- Nonprofits In'. The URL is 'secure.insurancefor nonprofits.org/AMSCentral/BrokerOverview.cfm'. The page is divided into several sections:

- Main Brokerage Info:** Includes fields for Default/Billing Address (333 Front Street, Suite 200, Santa Cruz, CA 95060), Phone ((831) 621-6013), Email (myarnell@niac.org), and Website (www.insurancefor nonprofits.org). There is an 'Edit' button and a link to 'view all broker info >>'.
- Primary/Billing Contact:** Shows Name and Phone fields with an 'Edit' button.
- Claims Contact:** Shows Name and Phone fields with an 'Edit' button.
- AR Contact:** Shows Name and Phone fields with an 'Edit' button.
- Contacts Table:** A table with columns for Name, Title, Email, Action, and Interests. It includes a search bar and filters for 'inactive', 'access', 'admin', and 'Add Contact'. The table lists several contacts, with annotations pointing to specific rows.
- Broker Reference Corner:** A section at the bottom of the page.

Annotations in the image include:

- A pink box around the 'Add Contact' button in the Contacts section.
- A pink box around the 'Delete' button for Steven Moody.
- A pink 'X' icon next to Tina Mazzei's name in the Contacts table.
- Arrows pointing from text on the left to specific rows in the Contacts table: Dottie Lechtenberg (admin access), Steven Moody and Kevin Huth (general access), Tina Mazzei (deleted), and Thomas Smith (no icon/access).

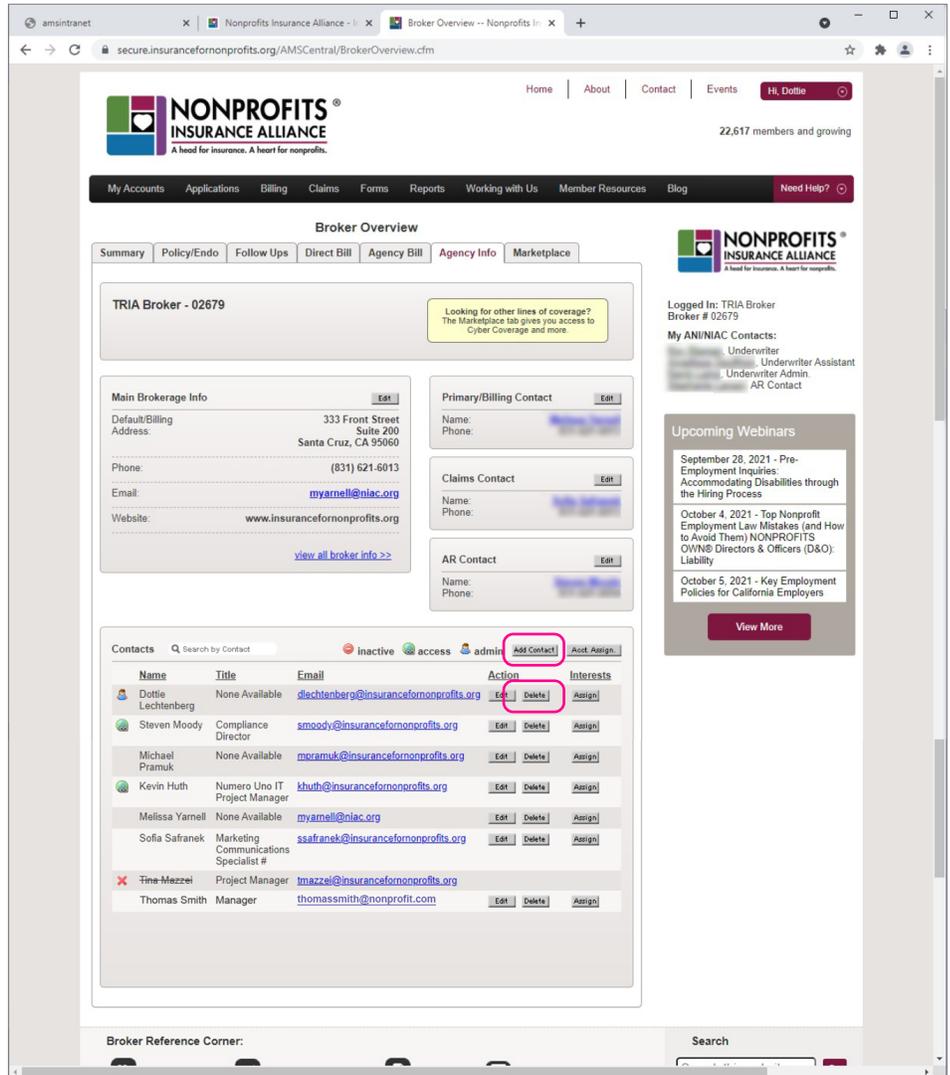
| Name | Title | Email | Action | Interests |
|--------------------|---------------------------------------|--|--------------------|-----------|
| Dottie Lechtenberg | None Available | dlechtenberg@insurancefor nonprofits.org | Edit Delete Assign | |
| Steven Moody | Compliance Director | smoody@insurancefor nonprofits.org | Edit Delete Assign | |
| Michael Pramuk | None Available | mpramuk@insurancefor nonprofits.org | Edit Delete Assign | |
| Kevin Huth | Número Uno IT Project Manager | khuth@insurancefor nonprofits.org | Edit Delete Assign | |
| Melissa Yarnell | None Available | myarnell@niac.org | Edit Delete Assign | |
| Sofia Safranek | Marketing Communications Specialist # | ssafranek@insurancefor nonprofits.org | Edit Delete Assign | |
| Tina Mazzei | Project Manager | tmazzei@insurancefor nonprofits.org | Edit Delete Assign | |
| Thomas Smith | Manager | thomasmith@nonprofit.com | Edit Delete Assign | |

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.

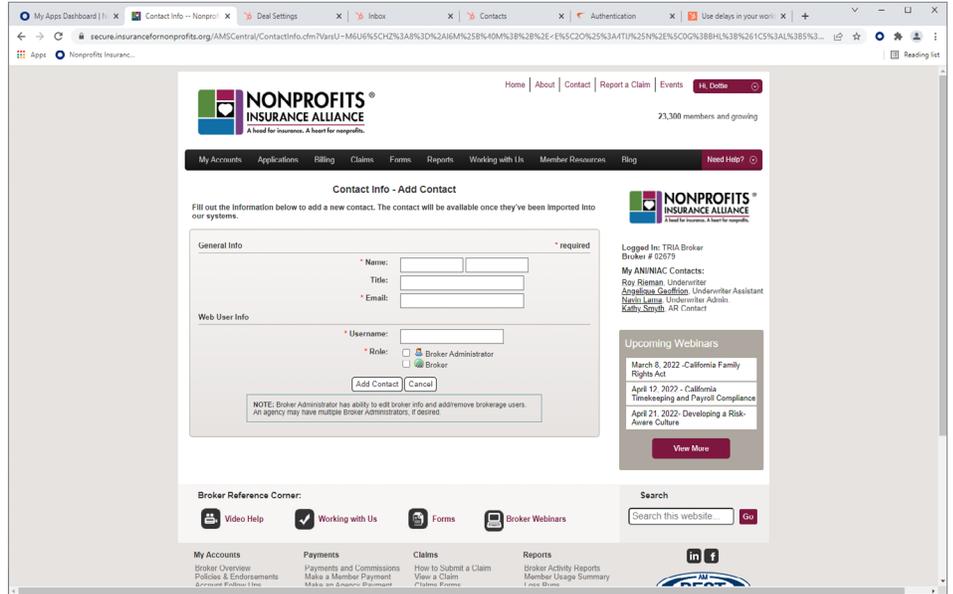
Click "Add Contact" to add a contact.

Click "Delete" to delete a contact.



Add / Delete an Agency Contact (continued)

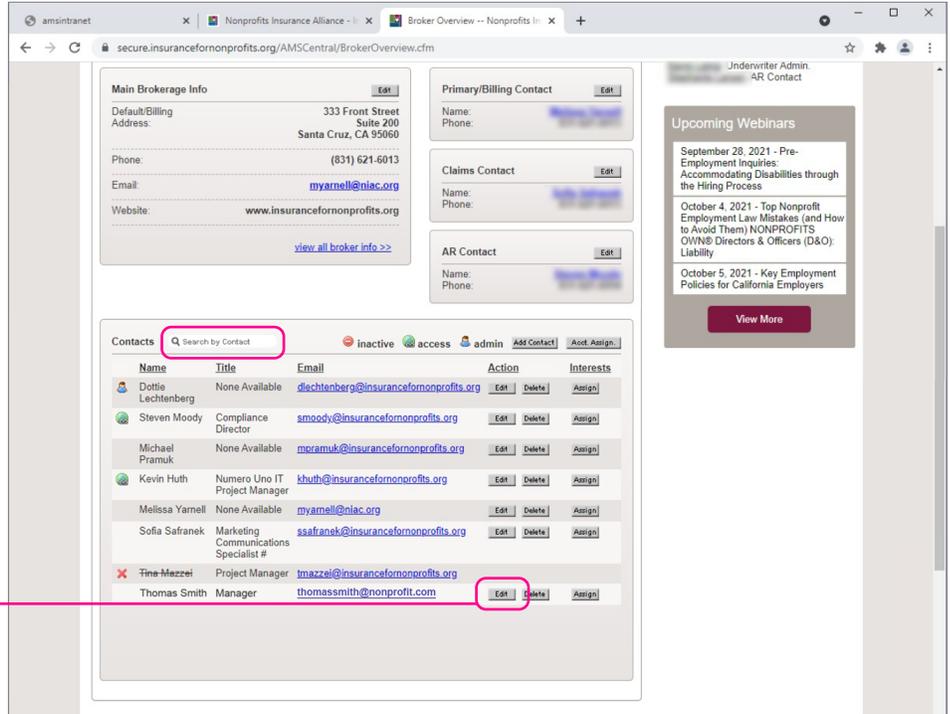
Enter the information for your new Agency Contact and designate whether the contact will have Admin or General access to the portal. Hover over each role to learn about the permissions for each role.



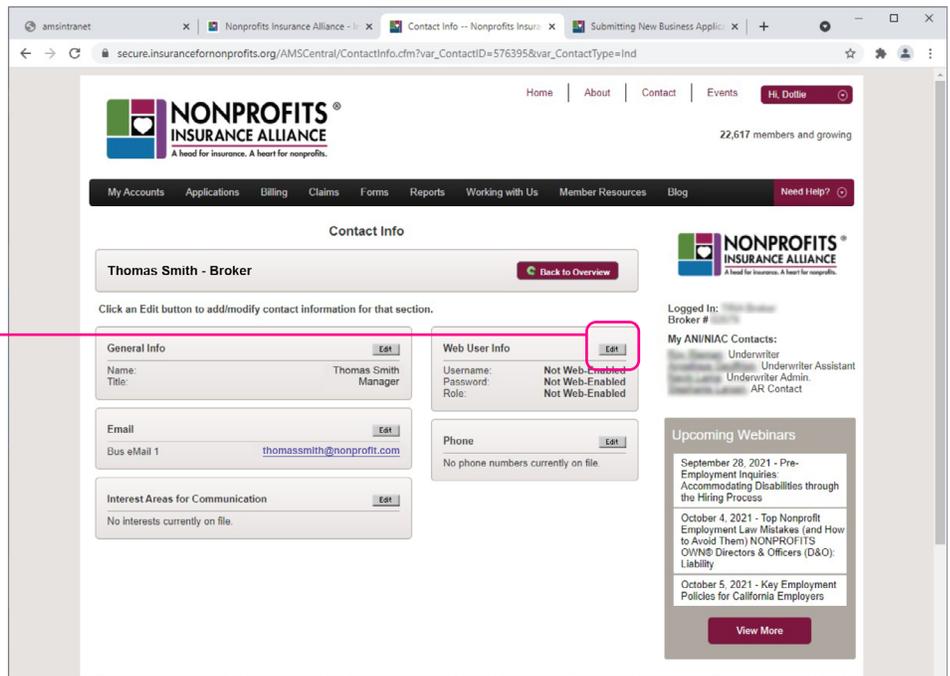
Give a Broker Contact Access to NIA Broker Portal

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.

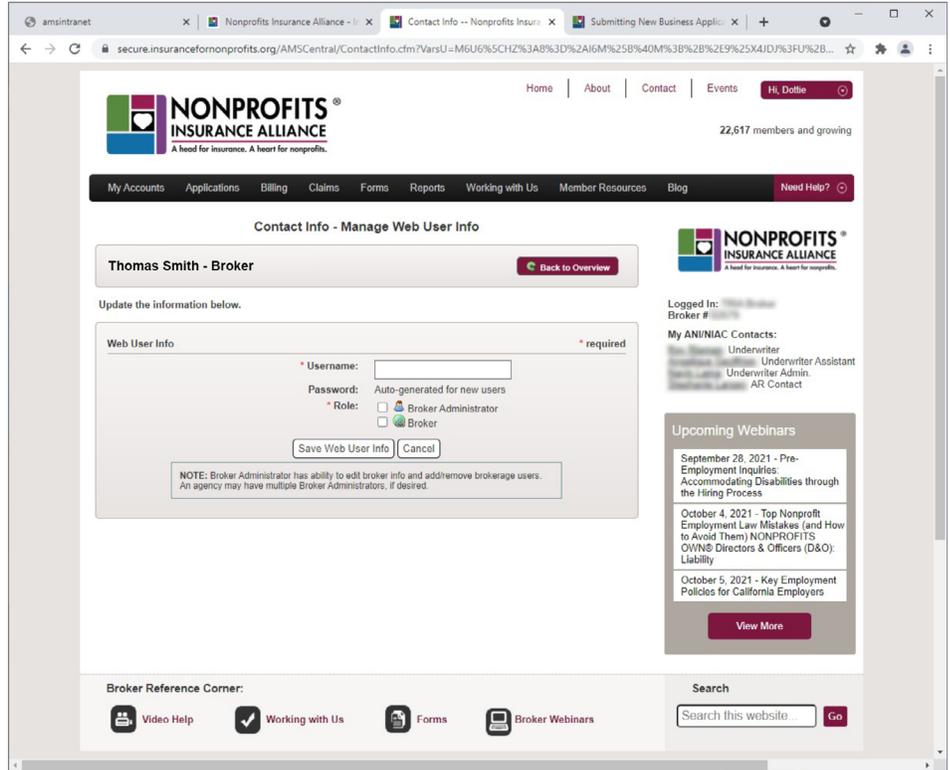


2. Click the **Edit** button in the Web User Info file on the next screen.



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

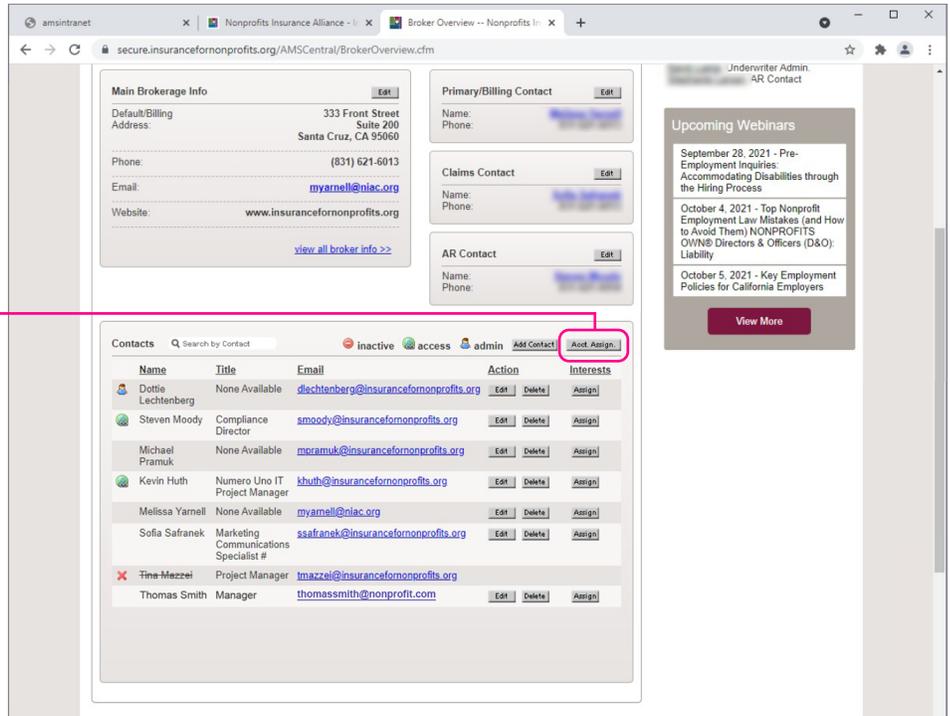
- Assign a username. Username format is FirstnameLastname. If you receive an error message that the username is unavailable add your broker ID# at the end of the username, i.e. FirstnameLastname00000. Choose the level access (Broker Administrator or Broker (general)). Click the **Save Web User Info**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



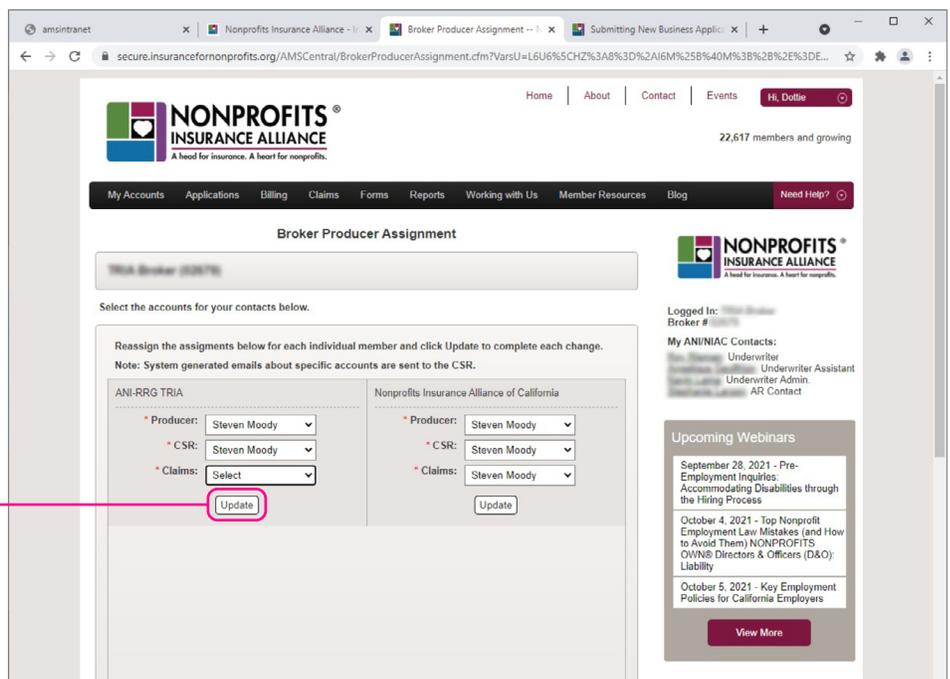
Reassign Broker Contacts to Member/Policyholder Accounts

Reassign Broker Contacts to Member/Policyholder Accounts in two easy steps.

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

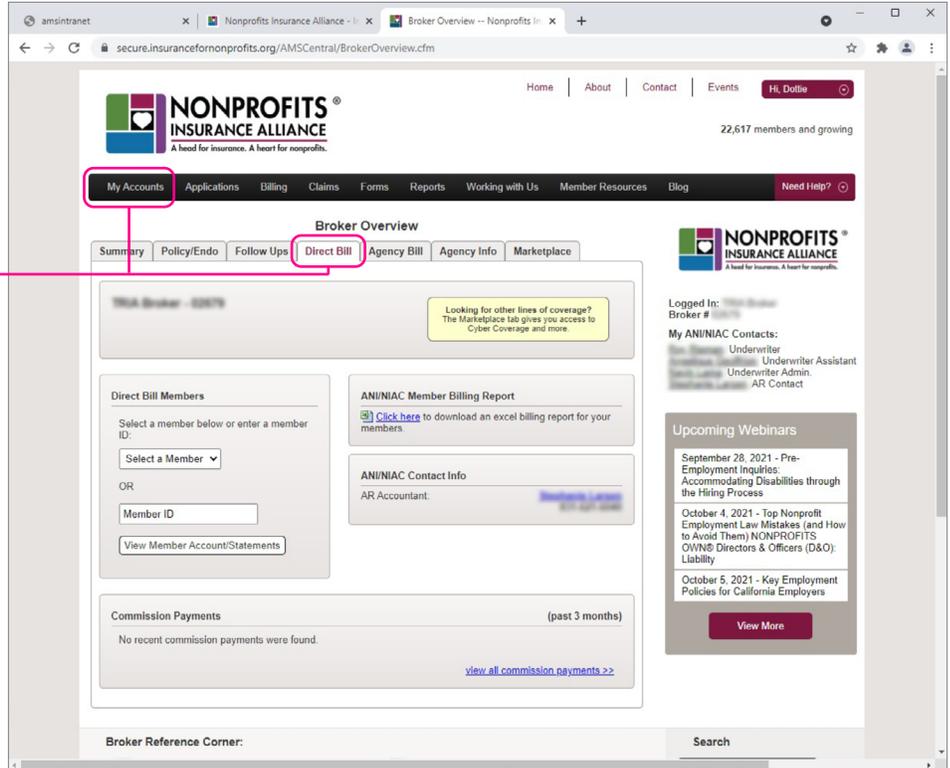


2. On the next screen, use the dropdown menus to select another Broker Contact. Be sure to click the **Update** button. You will receive an email confirming the Member/Policyholder Account reassignment.



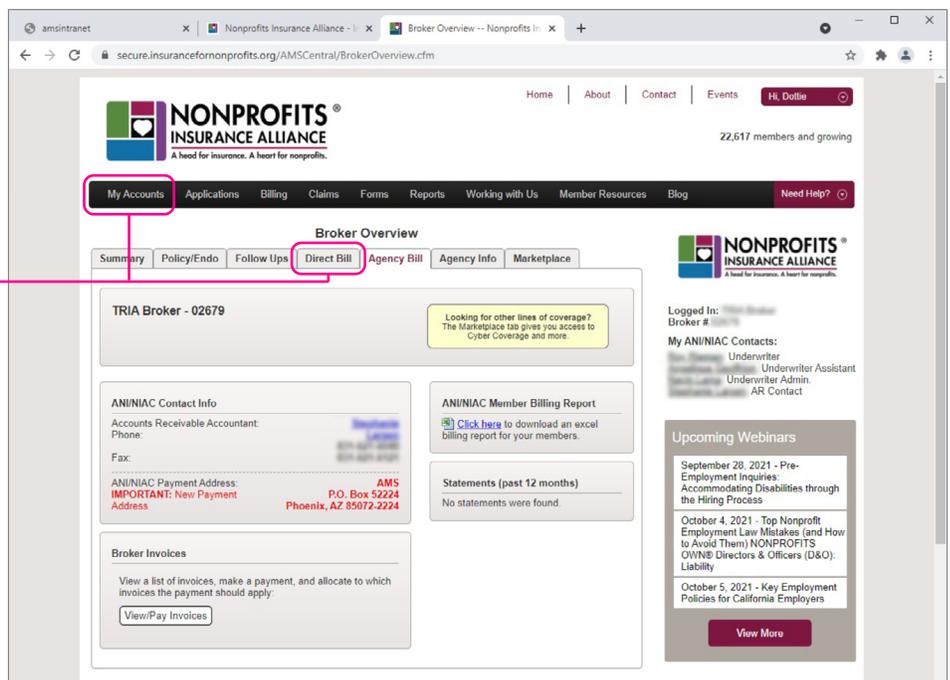
Direct Bill Information

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



Agency Bill Information

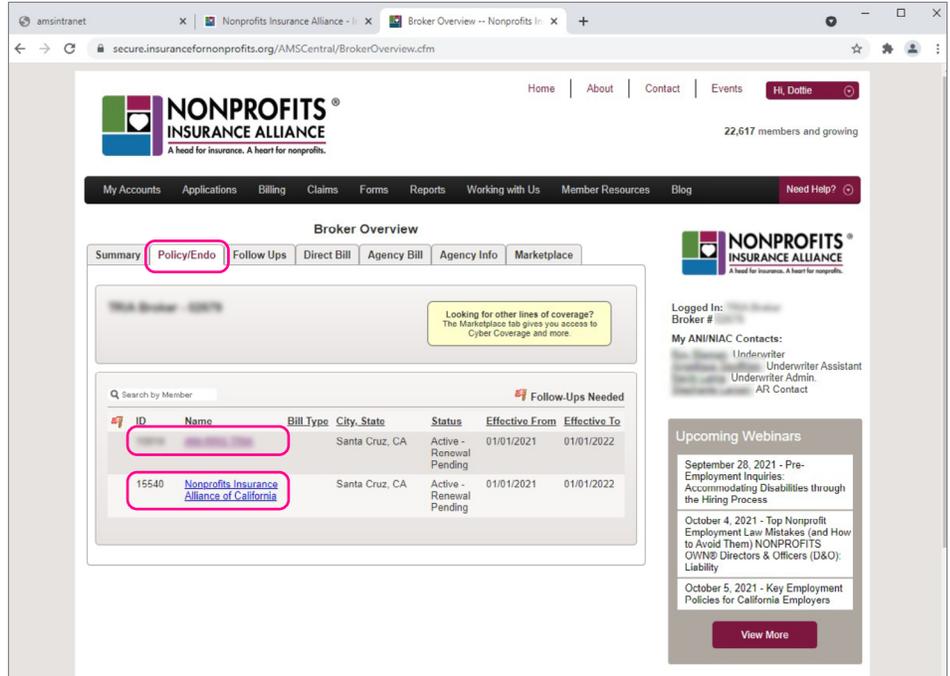
Hover over **My Accounts**, click on **Broker Overview**, then **Agency Bill** tab.



Member/Policyholder Overview

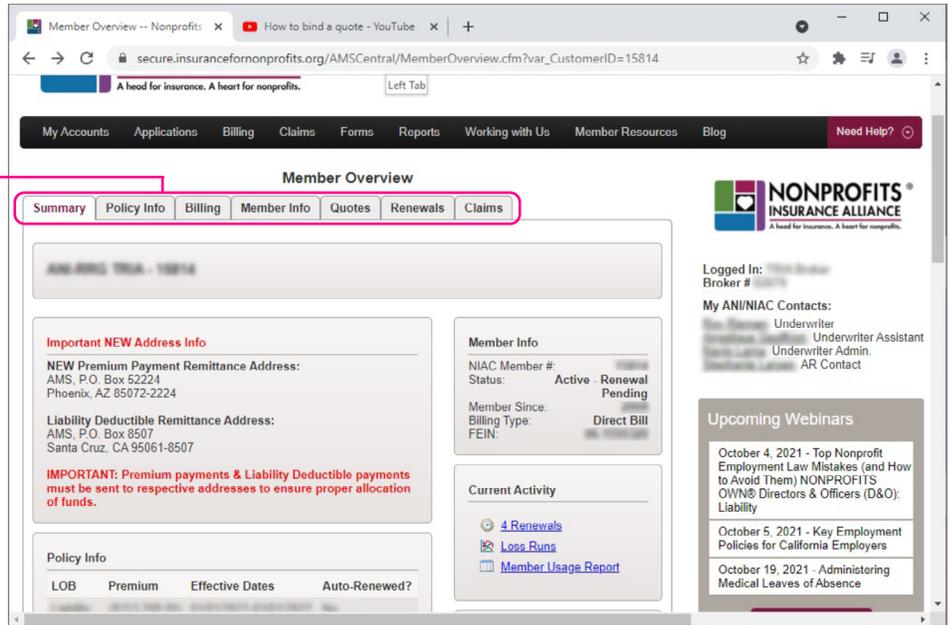
To locate member accounts, hover over **My Accounts** and click on **Policies & Endorsements**.

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



Member/Policyholder Overview (continued)

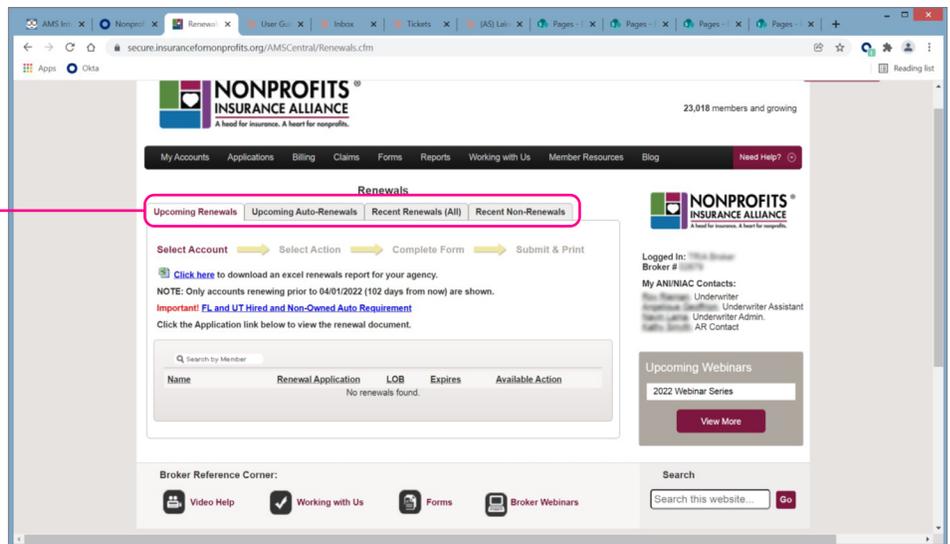
The **Member Overview** contains seven tabs for the account: **Summary, Policy Info, Billing, Member Info, Quotes, Renewals, and Claims.**



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.

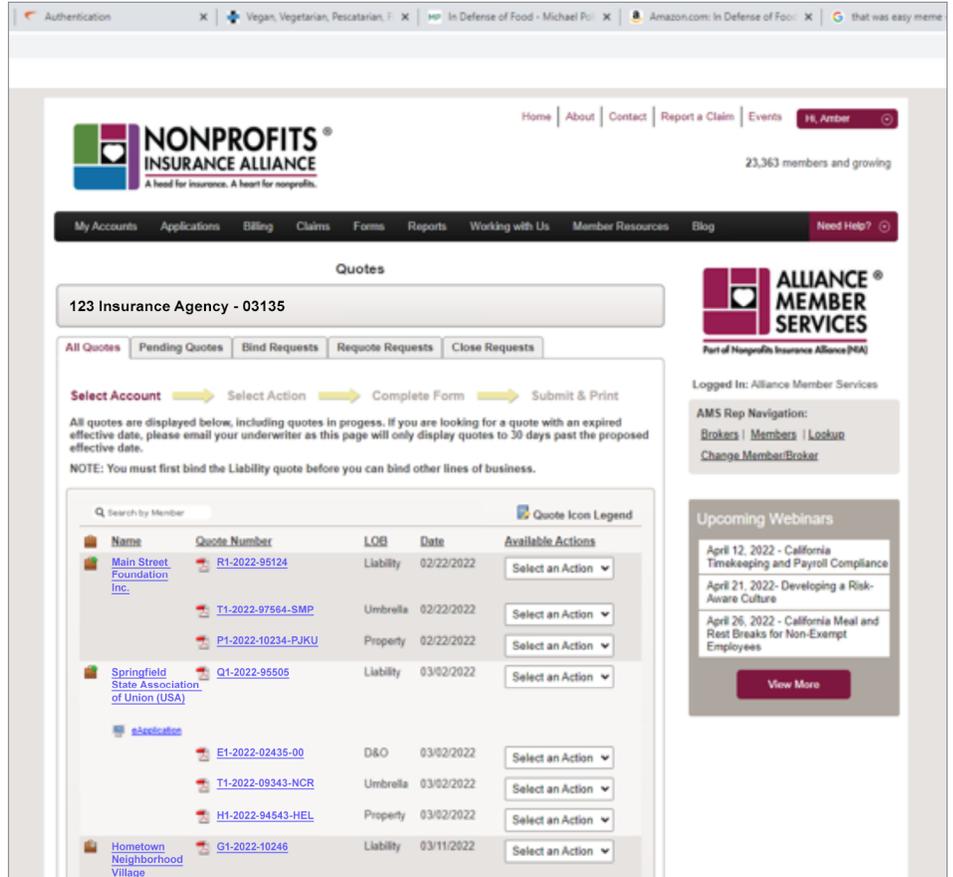


Bind a Quote

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.



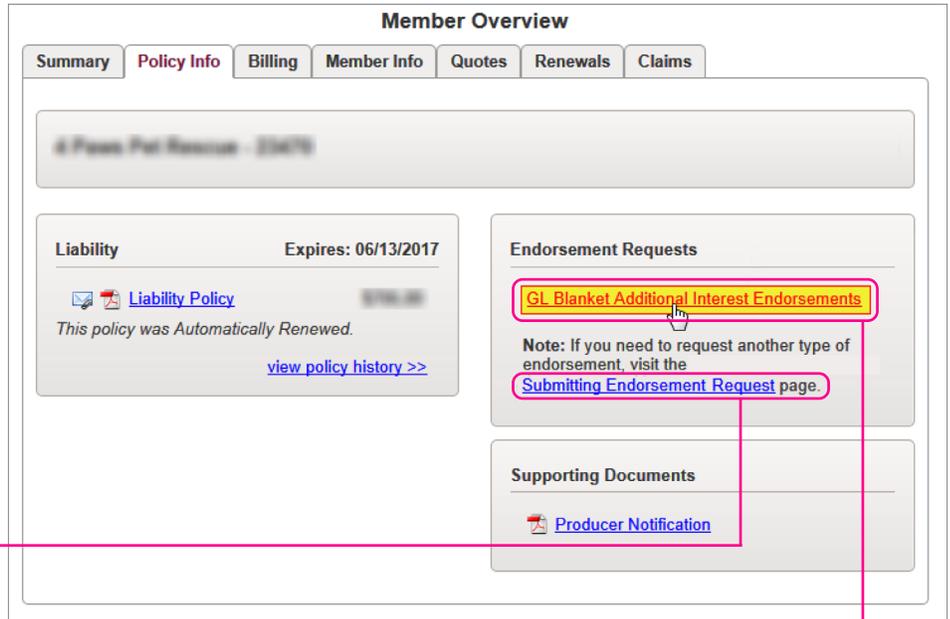
Policy Changes

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**.



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:

Add Form to General Liability Blanket Additional Insured

Please fill out the form below to add an additional insured.

NOTE: This form only handles addition of new GL Blanket Additional Insured. Any modifications to or deletions of existing Additional Insureds must be done by our underwriting staff. Please contact your underwriting team to process modifications or deletions.

General Liability Blanket Additional Insured Information * required

* Broker: 0000 - Business Professionals Ins.
Disability Rights Education and Defense Fund, Inc.

* Named Insured:

* General Liability Policy: 2016 2016

First, select the policy number.

Insured Information

Customer: 06974 - Disability Rights Education and Defense Fund, Inc. Status: Active
 Policy: 2016-06974 From: 03/04/2016 To: 03/04/2017 Coverage as of: 02/16/2017

Confirmation of Blanket Coverage

This system can only be used to add specific Additional Insureds names into one of the Blanket Additional Insureds forms but only if that Additional Insured would otherwise already be covered by that Blanket Additional Insured Form.

By typing in your initials and checking the box below, you are confirming that this Member is required to name the Additional Insured as an Additional Insured on this policy, under a written contract, lease or agreement currently in effect, or becoming effective during the term of this policy.

This policy will be amended to include the specified individual or entity as an Additional Insured, in reliance on your representation of the existence of the Additional Insured requirement within a written contract, lease or agreement. If your representation is incorrect, you agree to indemnify us for any payment or obligation made because of the Additional Insured status which otherwise would not have been extended under the terms of this policy.

* Type Your Initials Here:

* I confirm the above statement is true:

Read and accept the legal agreement.

General Liability Blanket Additional Insured Detail

* Additional Insureds: Add New Additional Insured Below

To select an existing Additional Insured, select a name from this list.

* Effective From:

* Effective To: 03/04/2017

* Applicable Form: Select Form

As Regards:
(150 characters remaining)

Additional Insured Info

* Additional Insured Name:
(150 characters remaining)

* Address Line 1:

Address Line 2:

* City/State/Zip: Select

Select to either add a new AI or add a form to an existing AI.

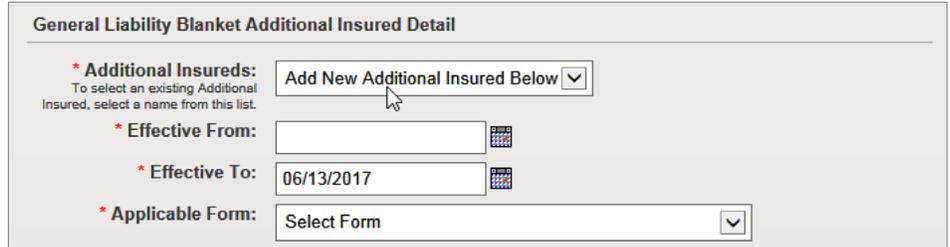
Select a form to add, and then fill in the rest of the form.

Finally click the button to submit the Endorsement.

Policy Changes (continued)

Adding a New Additional Insured

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



General Liability Blanket Additional Insured Detail

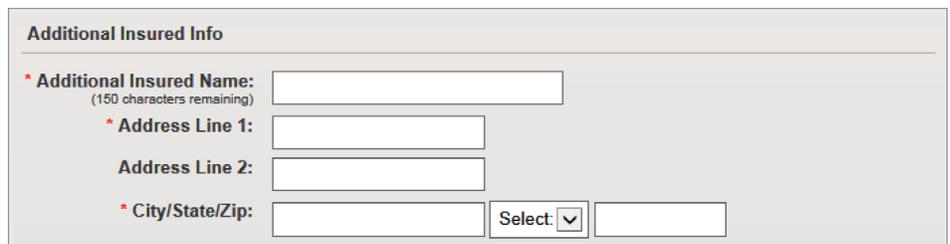
* **Additional Insureds:** To select an existing Additional Insured, select a name from this list. Add New Additional Insured Below ▼

* **Effective From:**

* **Effective To:** 06/13/2017

* **Applicable Form:** Select Form ▼

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



Additional Insured Info

* **Additional Insured Name:** (150 characters remaining)

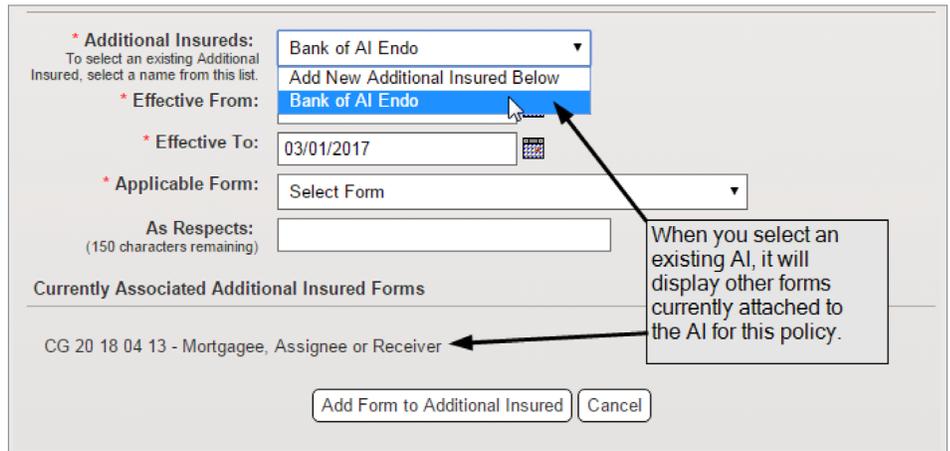
* **Address Line 1:**

Address Line 2:

* **City/State/Zip:** Select: ▼

Selecting an Existing Additional Insured

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



* **Additional Insureds:** To select an existing Additional Insured, select a name from this list. Bank of AI Endo ▼

* **Effective From:**

* **Effective To:** 03/01/2017

* **Applicable Form:** Select Form ▼

As Regards: (150 characters remaining)

Currently Associated Additional Insured Forms

CG 20 18 04 13 - Mortgagee, Assignee or Receiver

When you select an existing AI, it will display other forms currently attached to the AI for this policy.

Add Form to Additional Insured Cancel

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:

Add Form to General Liability Blanket Additional Insured - Confirmation

Your information has been updated.

* required

General Liability Blanket Additional Insured Information

* Broker: 0000 - Business Professional Ins
 * Named Insured: General Services Admin Program
 * General Liability Policy: 2016 0000

Insured Information

Customer: 0000 - General Services Admin Program Status: Active
 Policy: 2016-01917 From: 03/01/2016 To: 03/01/2017 Coverage as of: 02/16/2017

Confirmation of Blanket Coverage

This system can only be used to add specific Additional Insureds names into one of the Blanket Additional Insureds forms but only if that Additional Insured would otherwise already be covered by that Blanket Additional Insured Form.

By typing in your initials and checking the box below, you are confirming that this Member is required to name the Additional Insured as an Additional Insured on this policy, under a written contract, lease or agreement currently in effect, or becoming effective during the term of this policy.

This policy will be amended to include the specified individual or entity as an Additional Insured, in reliance on your representation of the existence of the Additional Insured requirement within a written contract, lease or agreement. If your representation is incorrect, you agree to indemnify us for any payment or obligation made because of the Additional Insured status which otherwise would not have been extended under the terms of this policy.

* Type Your Initials Here: KH
 * I confirm the above statement is true: Yes

Once you submit the endorsement, you will be taken to a confirmation page that displays the information you've just entered.

General Liability Blanket Additional Insured Detail

* Additional Insureds: See Additional Insured Info Below
 * Effective From: 02/16/2017
 * Effective To: 03/01/2017
 * Applicable GL Form: CG 20 18 04 13 - Mortgagee, Assignee or Receiver
 As Respects: Loan #1234
(150 characters remaining)

Additional Insured Info

* Additional Insured Name: Bank of AI Endo
(150 characters remaining)
 * Address Line 1: 1234 Any Street
 Address Line 2:
 * City/State/Zip: Santa Cruz, California 95060

To add another AI, you can click the "Add Another Additional Insured" button. If you're done, you can click the "Done" button and be taken back to the Member Overview for this member.

Currently Associated Additional Insured Forms

No forms currently associated.

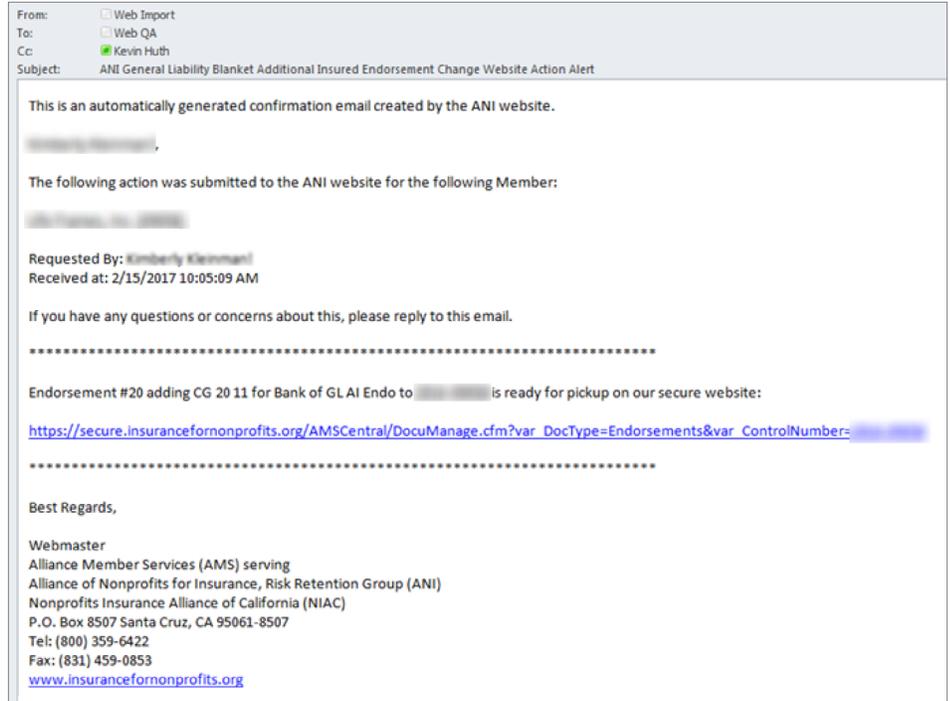
Add Another Additional Insured
Done

Policy Changes (continued)

Understanding the Endorsement Completion Email

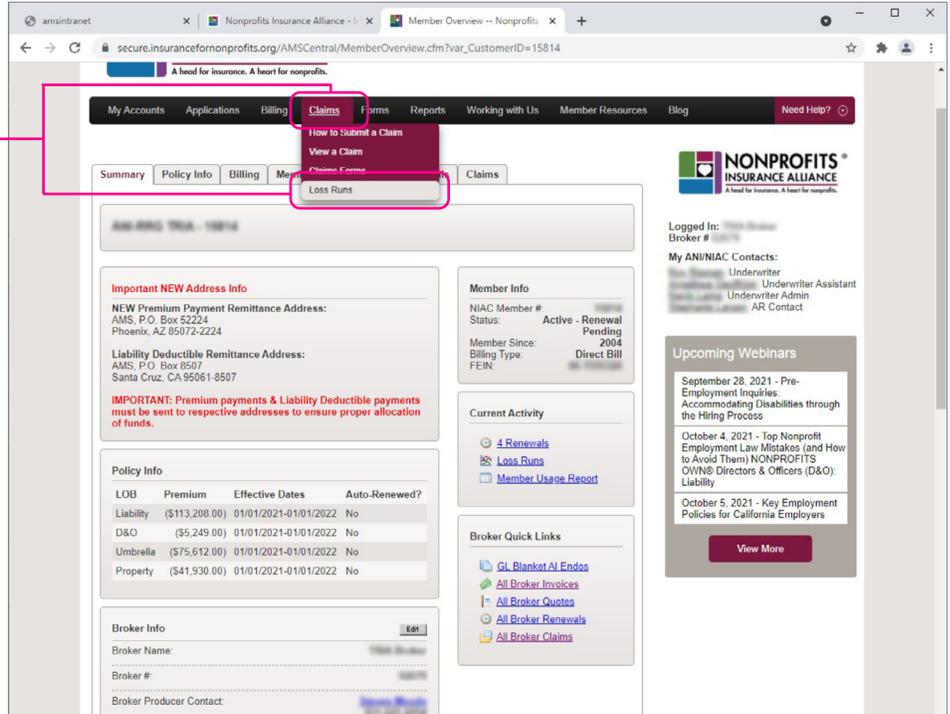
Finally, after your request is processed (typically within a few minutes) you should receive an email with a link to your endorsement. Clicking the link to the endorsement will take you to the General Liability endorsement page for that member.

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.



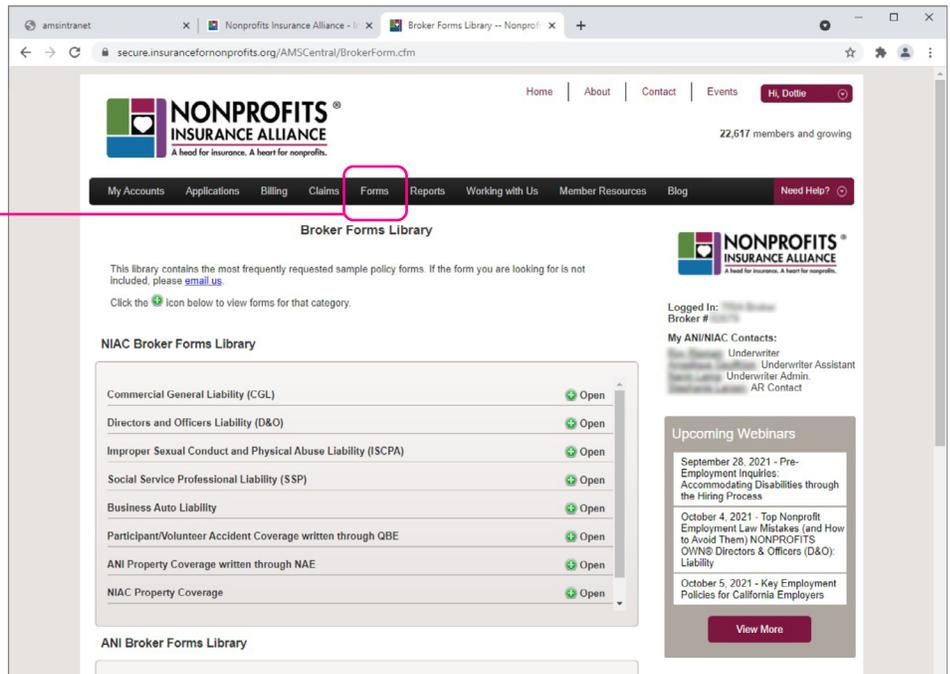
Claims & Loss Data

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.

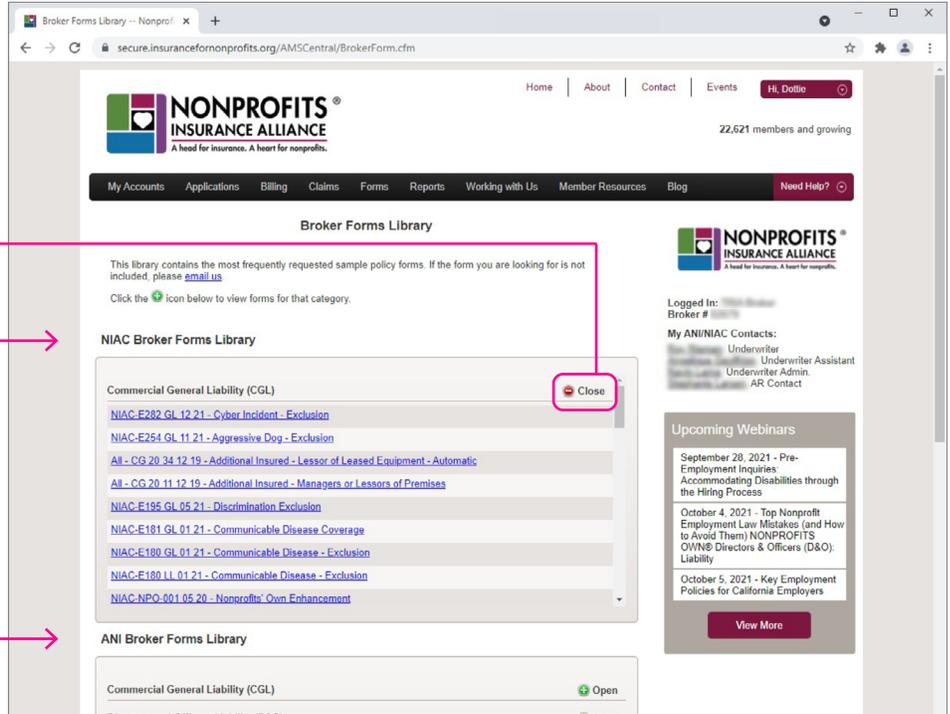


View NIA Policy Forms (continued)

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

NIAC - California Risks

ANI - All Other States

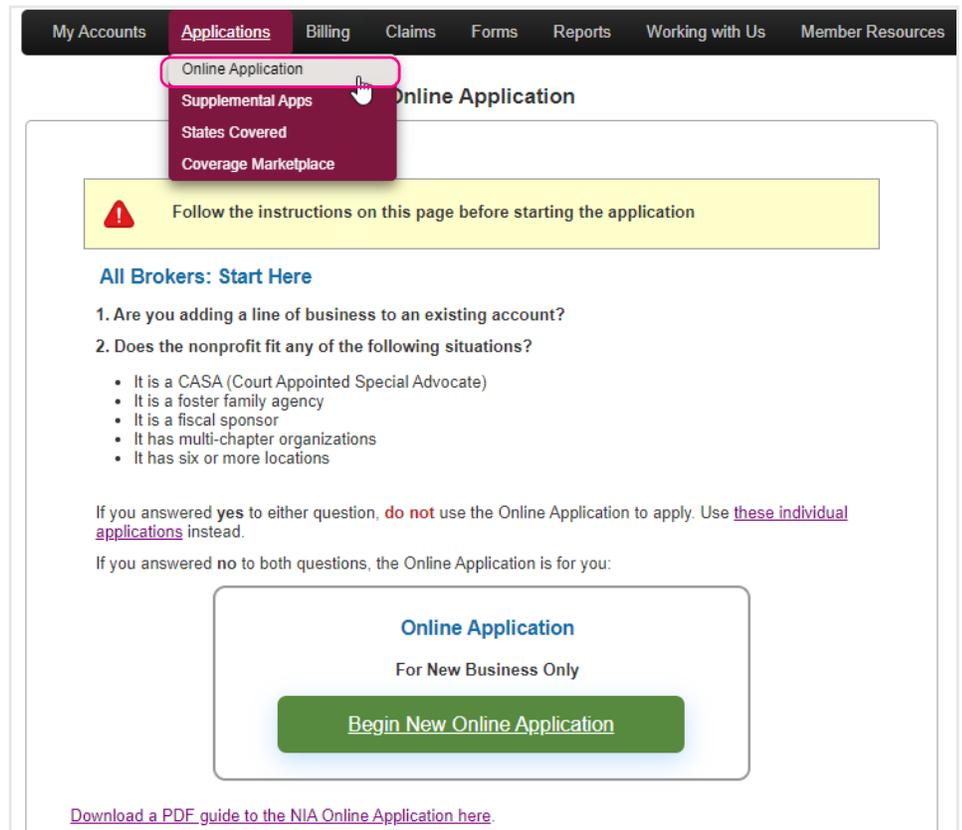


The NIA Online Application

Brokers may use the [NIA Online Application](#) for all eligible nonprofits.

The [NIA Online Application User Guide](#) 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 [NIA Online Application User Guide](#) for instructions on how to access the online application and review eligibility for your nonprofit applicants.



The screenshot shows the NIA Broker Portal interface. At the top, there is a navigation bar with the following items: My Accounts, Applications, Billing, Claims, Forms, Reports, Working with Us, and Member Resources. The 'Applications' menu is expanded, showing options: Online Application, Supplemental Apps, States Covered, and Coverage Marketplace. Below the navigation bar, the page title is 'Online Application'. A yellow warning box contains a red exclamation mark icon and the text: 'Follow the instructions on this page before starting the application'. Below this, the heading 'All Brokers: Start Here' is followed by two numbered questions: '1. Are you adding a line of business to an existing account?' and '2. Does the nonprofit fit any of the following situations?'. The second question has a bulleted list of conditions: 'It is a CASA (Court Appointed Special Advocate)', 'It is a foster family agency', 'It is a fiscal sponsor', 'It has multi-chapter organizations', and 'It has six or more locations'. Below the questions, there is a note: 'If you answered yes to either question, do not use the Online Application to apply. Use these individual applications instead.' and another note: 'If you answered no to both questions, the Online Application is for you:'. A large green button labeled 'Begin New Online Application' is centered on the page. At the bottom, there is a link: 'Download a PDF guide to the NIA Online Application here.'

NIA PDF Supplemental Applications

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

The [NIA Supplemental Applications](#) are available on the NIA Broker Portal.

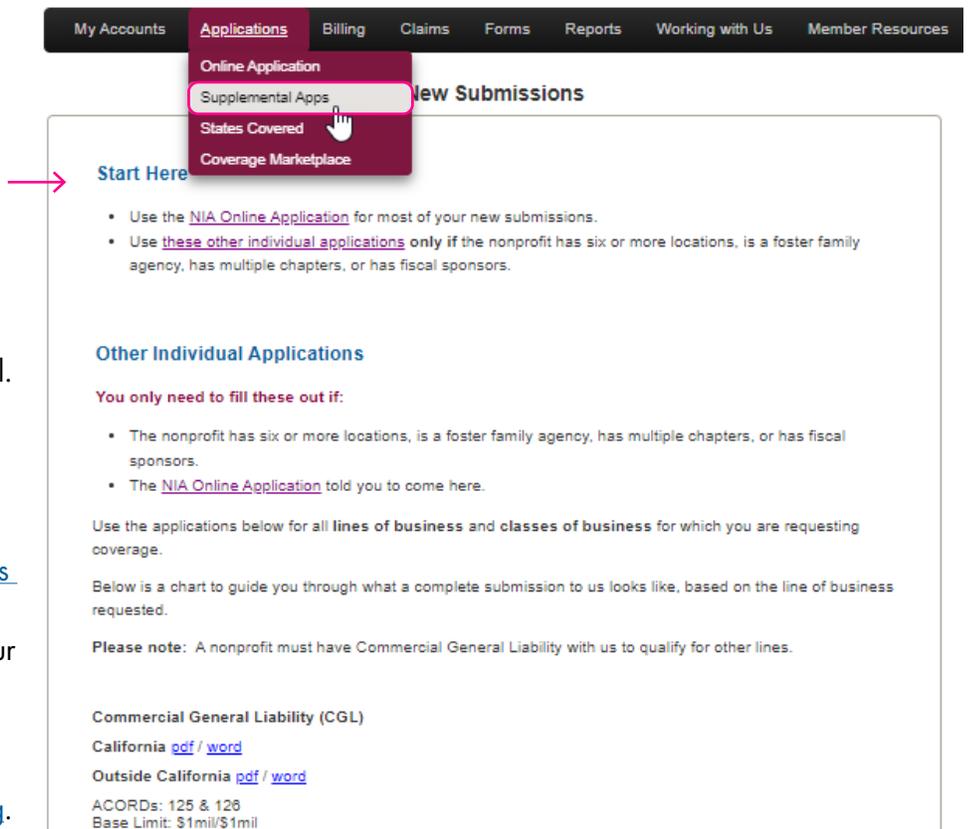
Hover over Applications and select Supplemental Apps (pictured here).

You will arrive at the [New Submissions page](#). Begin at "Start Here" to ensure you use the correct application for your nonprofit application.

Send all PDF submissions to submissions@insurancefornonprofits.org.

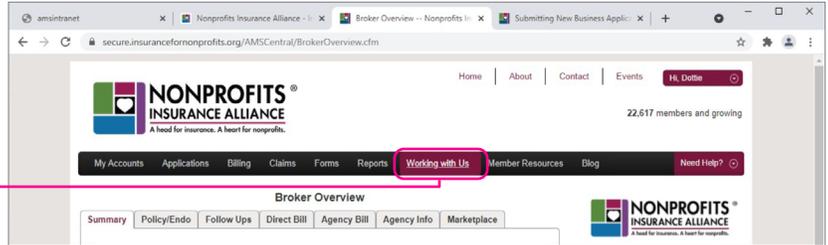
Make sure your submission includes the following:

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



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.

Everything brokers need to know about working with NIA.

New to NIA? Learn [how things work](#).

Want to submit 501(c)(3) business? You'll need to [become an NIA-appointed broker](#) first.

Already appointed with NIA? If you're newly appointed or just need a refresher, here's some of [the most common broker tasks](#).

I'm New To NIA
I'm Already NIA-Appointed



Insured by NIA:
[Urbanists Collective](#)
Seattle, WA

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:

- [Top 10 Reasons to Think of NIA First for Your 501\(c\)\(3\) Nonprofit Clients](#)
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](#)
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:

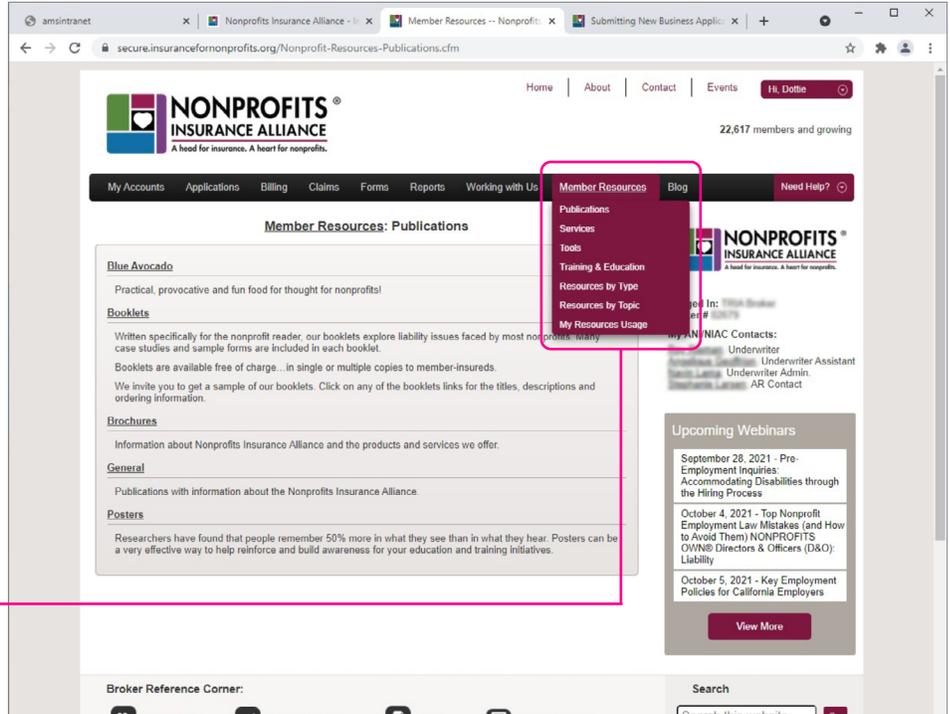
- [Coverages List](#)
See the menu of NIA's nonprofit insurance offerings.
- [NIA's Innovative Coverages, a Timeline](#)
How has NIA been a thought leader in the insurance industry? View the timeline to find out.

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 [A \(Excellent\) by AM Best](#).
- [NIA's Enduring Commitment to the Nonprofit Sector](#)
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 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.

