NIA Broker Portal Guide

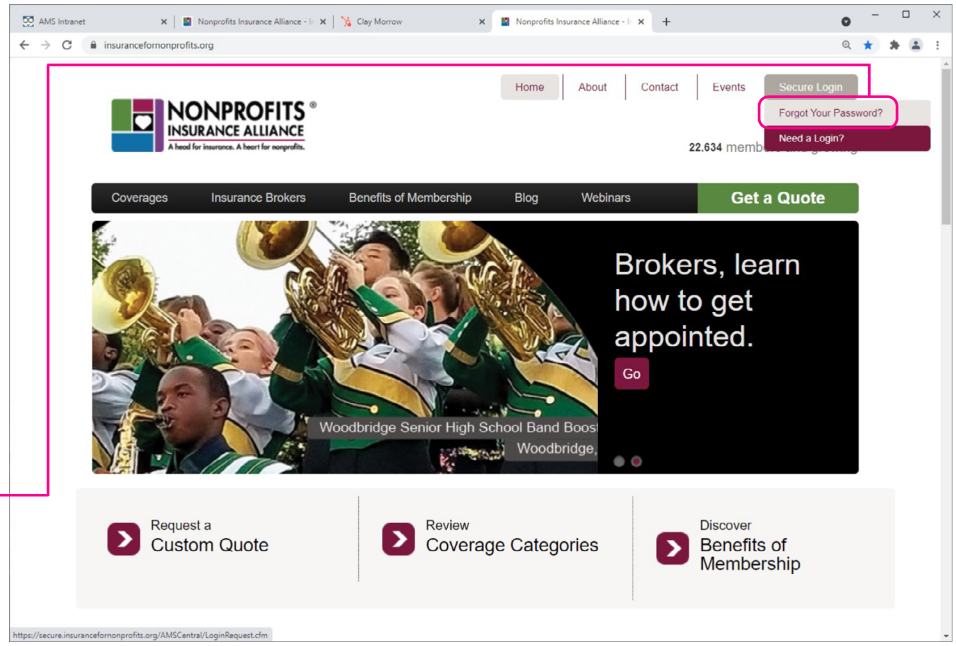
Table of Contents

Access the NIA Broker Portal

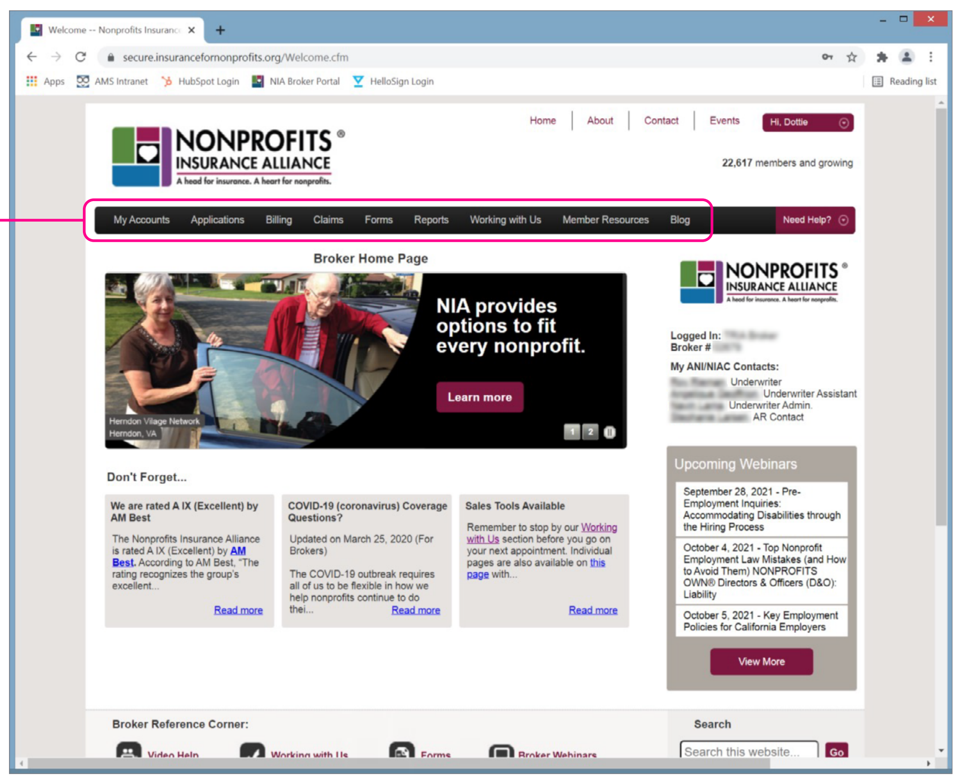
To login, go to www.insurancefornonprofits.org, click the **Secure Login** button, and enter your username and password.

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**.

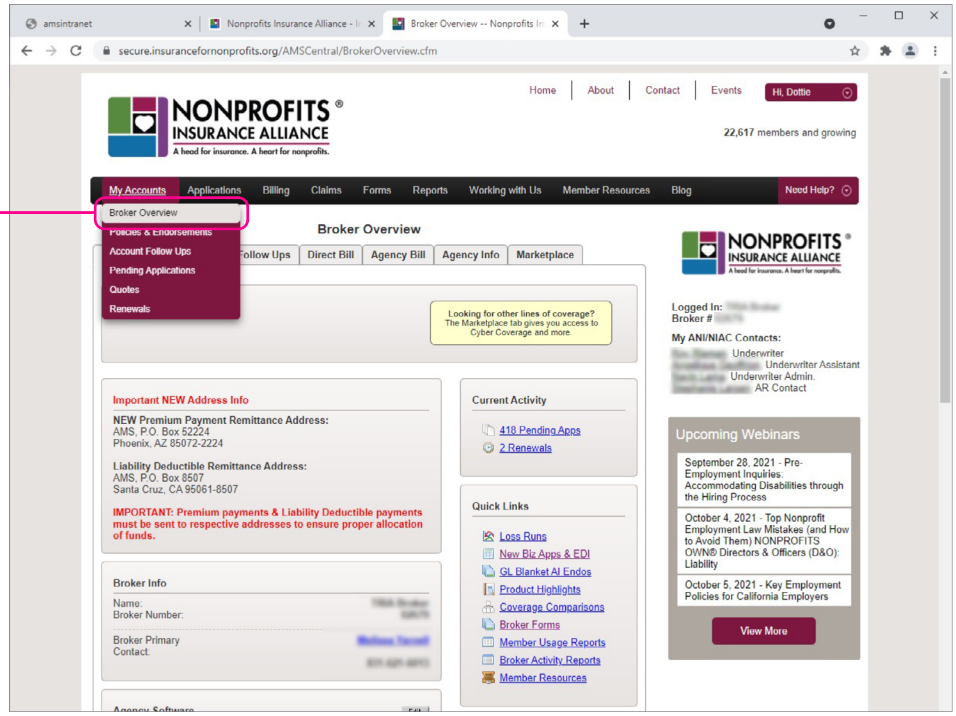


Then, use the black menu heading bar to begin navigating the NIA Broker portal.



Access Your Broker Summary

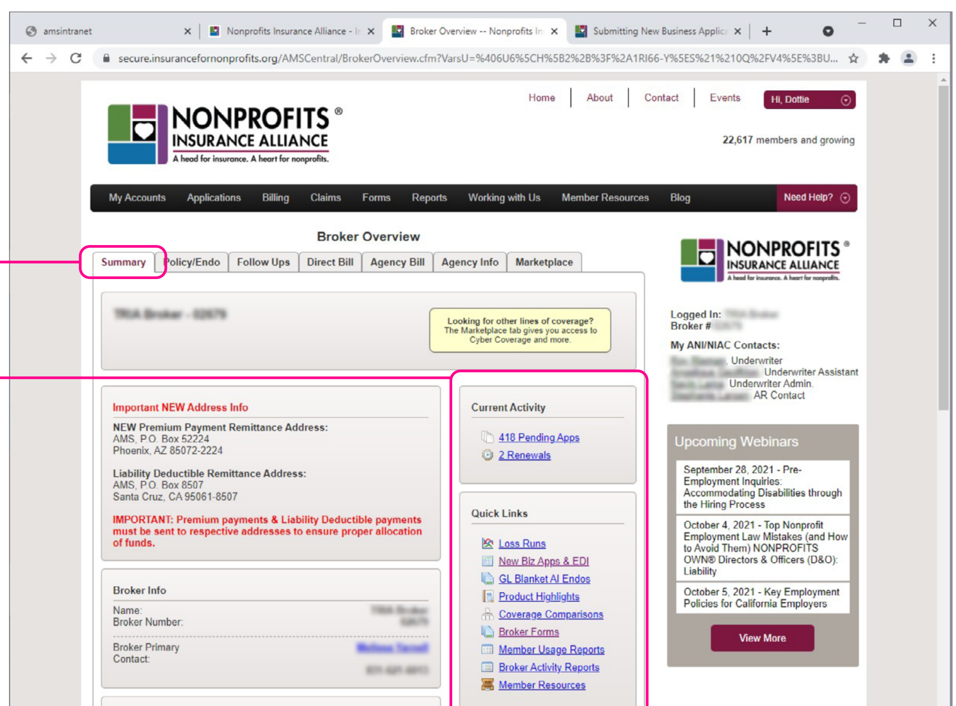
Hover over **My Accounts**, then click on **Broker Overview**.



View Broker Information

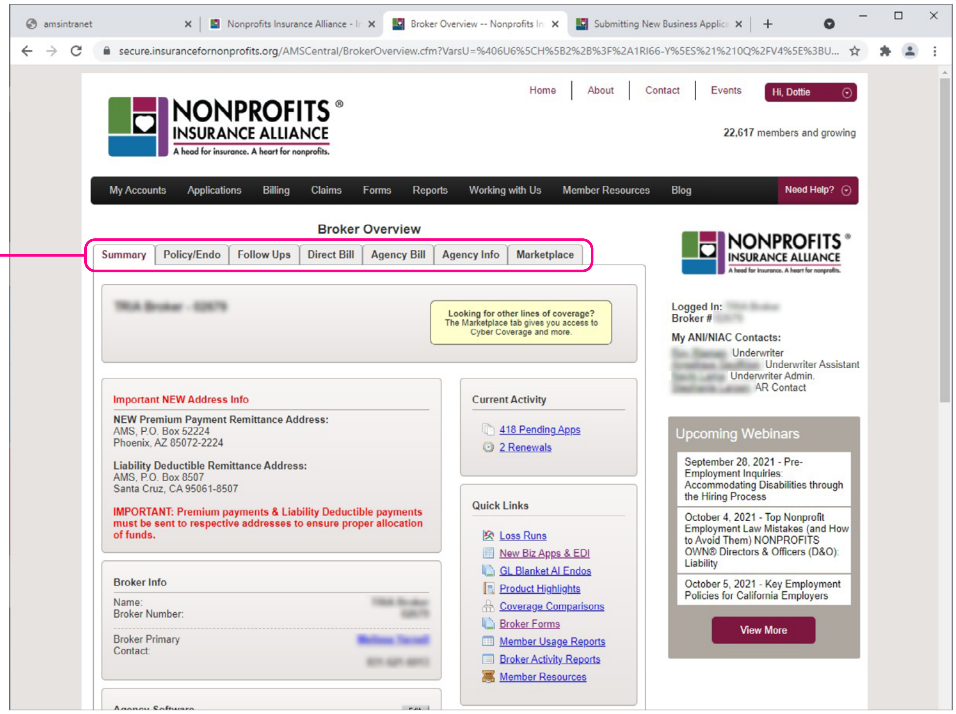
To see broker-specific information, hover over **My Accounts** and click on **Broker Overview**. You will land on the **Summary Tab**.

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



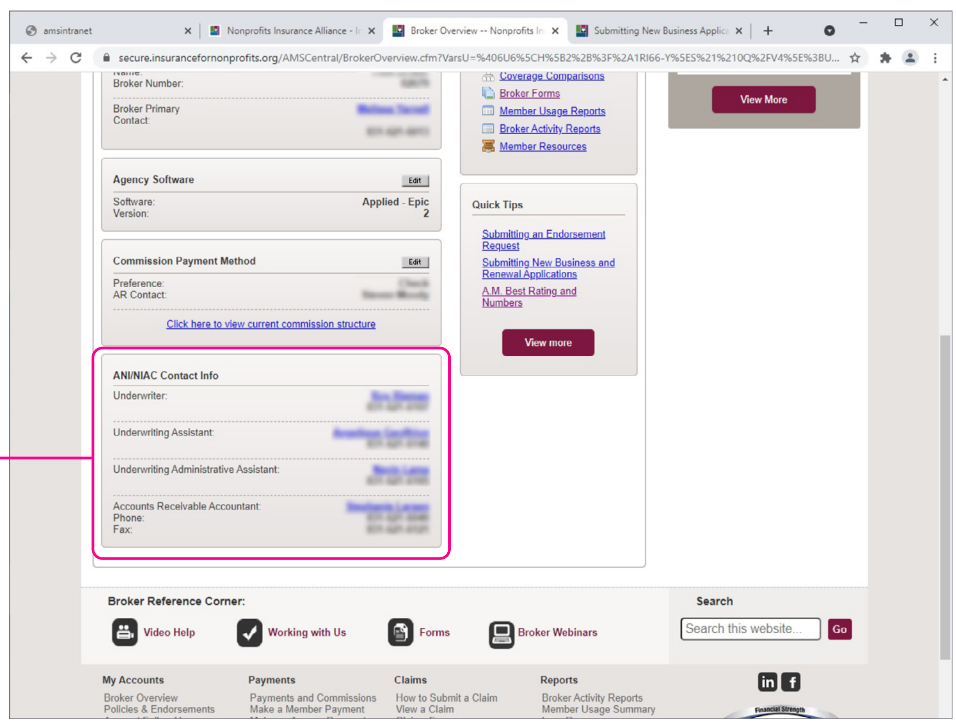
View Broker Information (continued)

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)

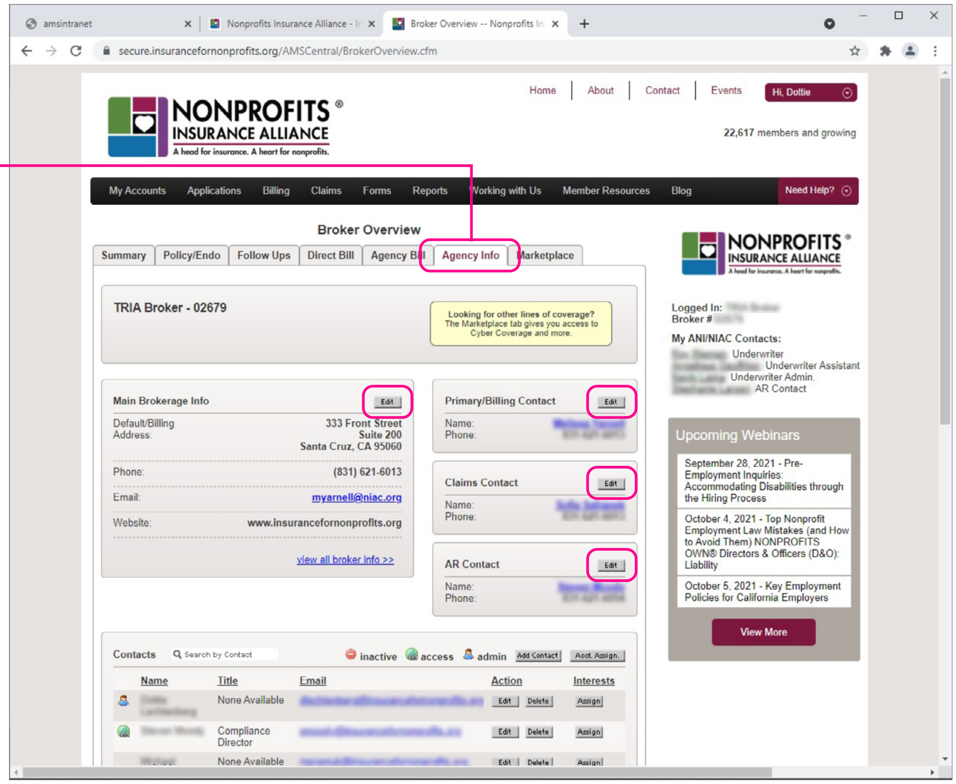
View Your Agency’s Primary Contacts

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.

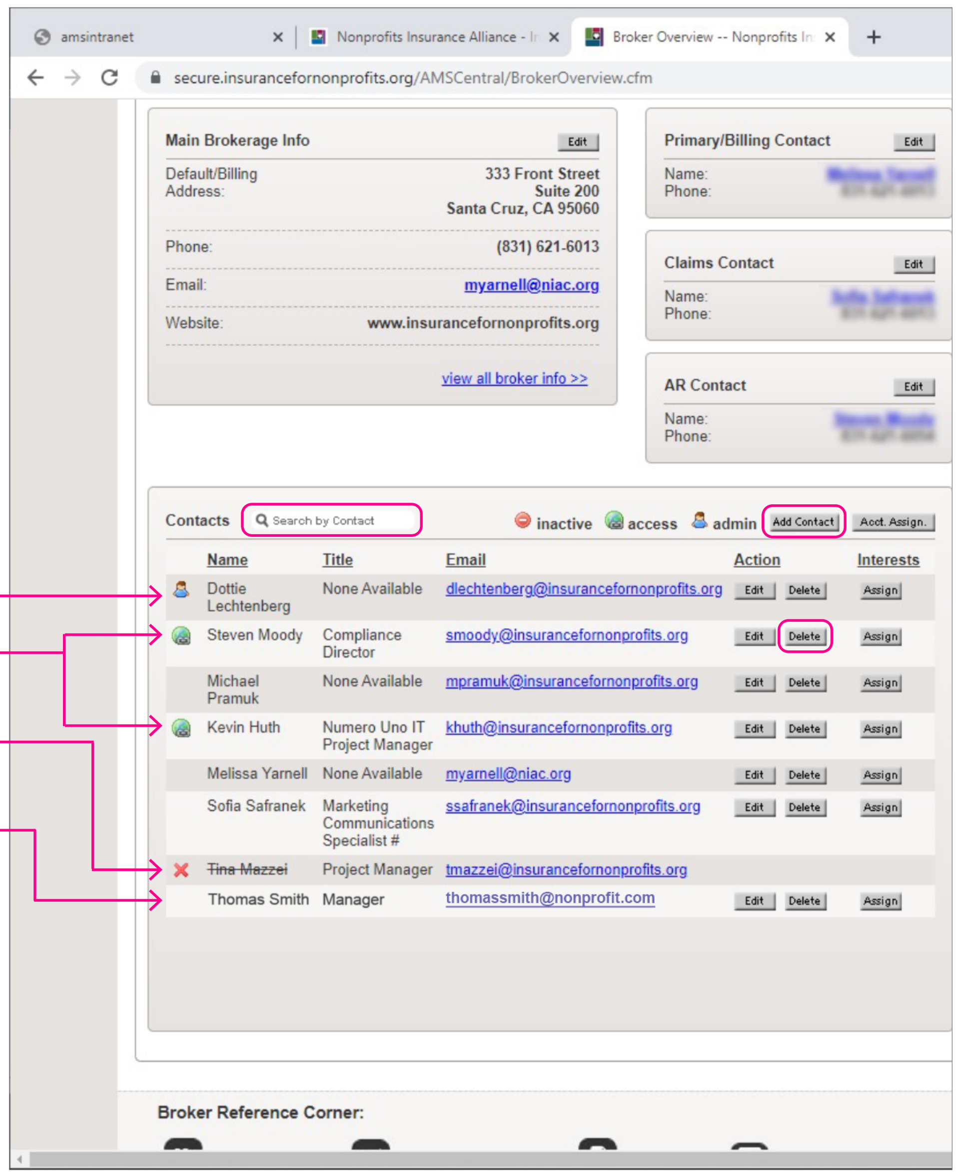
Understanding Broker Access

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

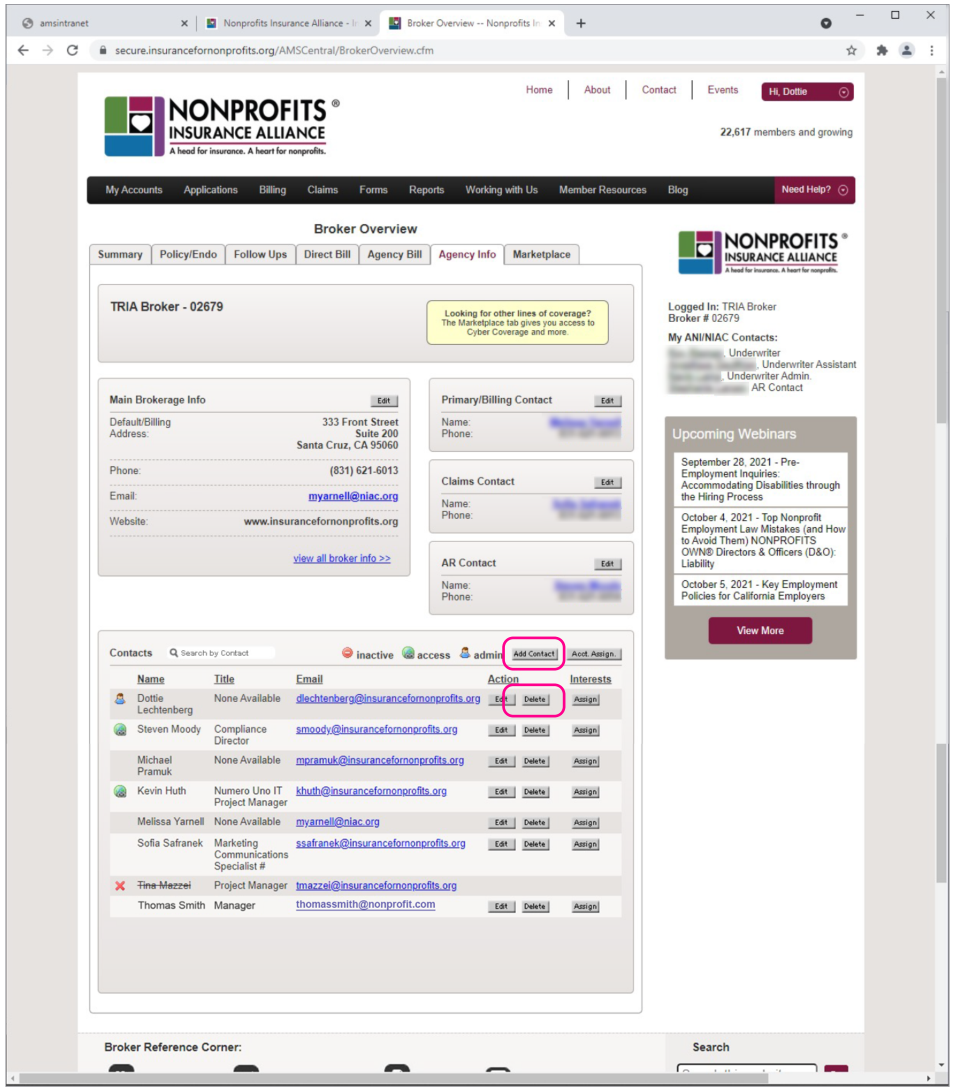


Add / Delete an Agency Contact

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

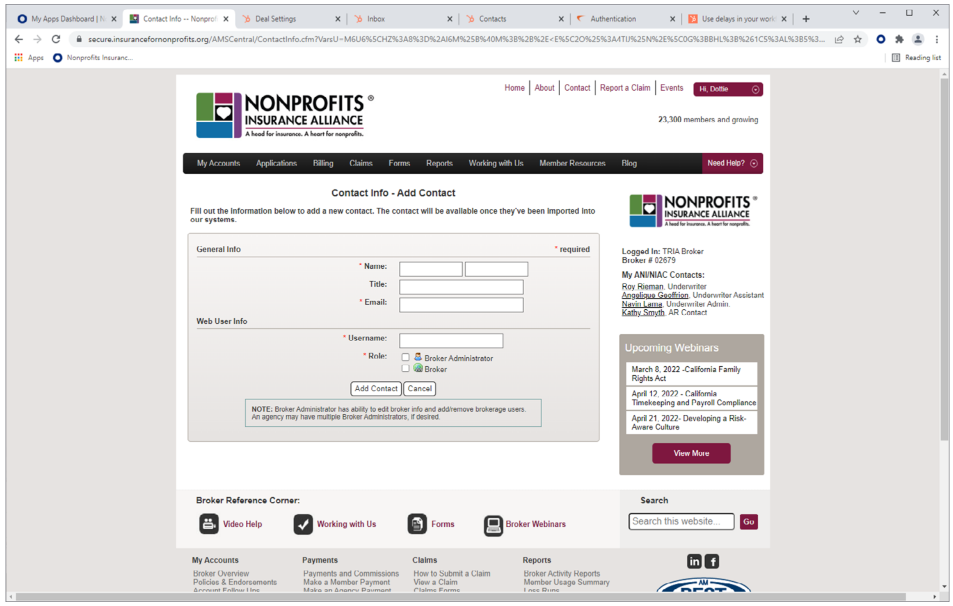
Click “Add Contact” to add a contact.

Click “Delete” to delete a contact.



Add / Delete an Agency Contact (continued)

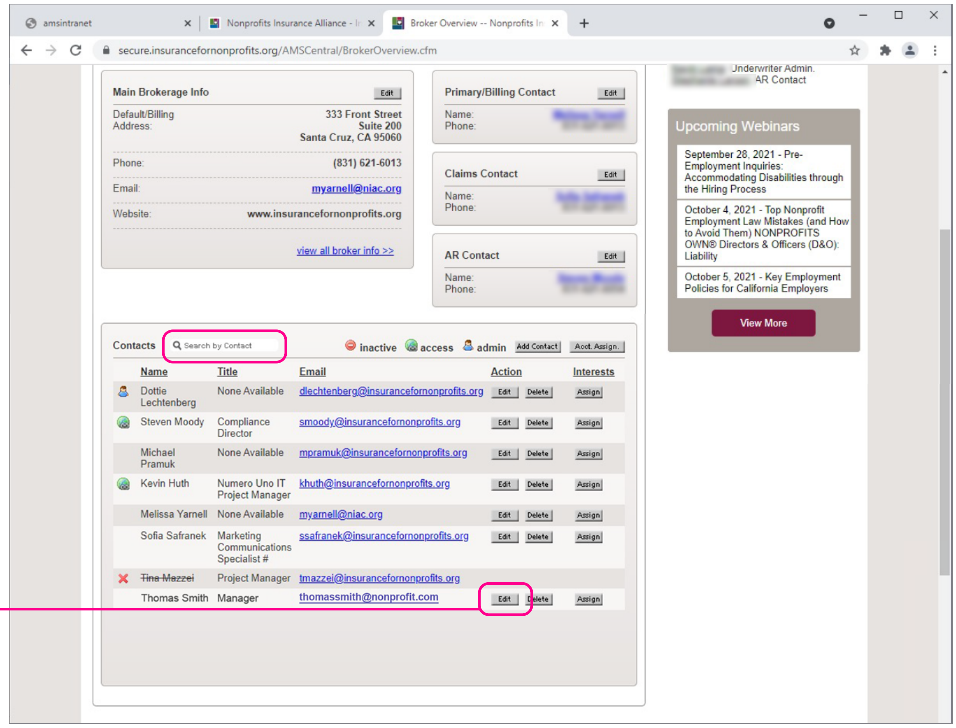
Enter the information for your new Agency Contact and designate whether the contact will have Admin or General access to the portal. Hover over each role to learn about the permissions for each role.



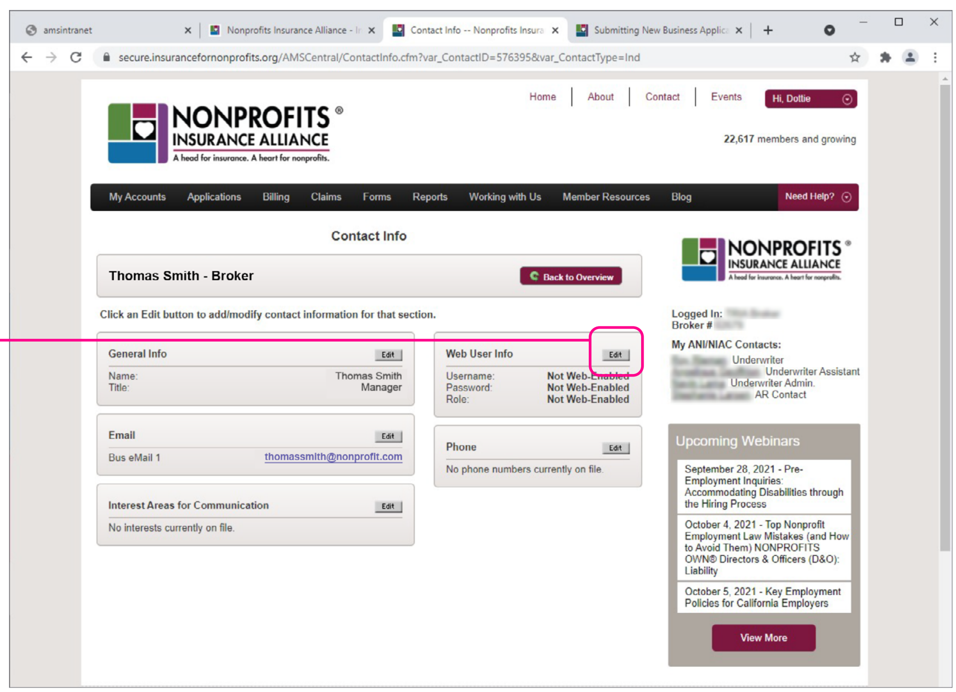
Give a Broker Contact Access to NIA Broker Portal

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.

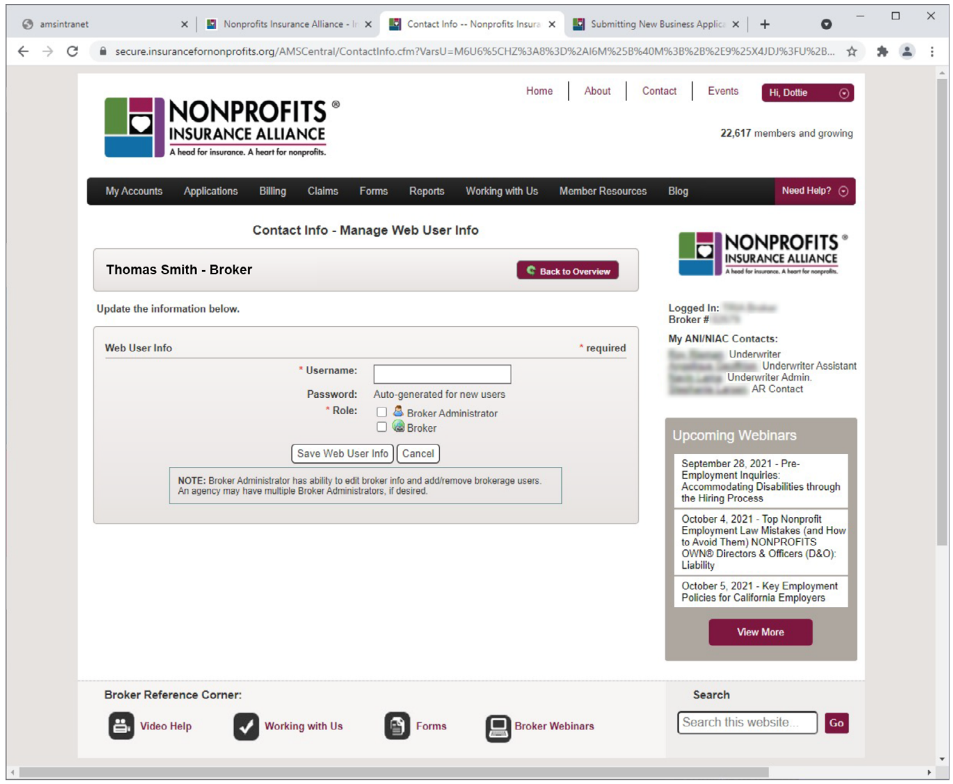


2. Click the **Edit** button in the Web User Info tile on the next screen.



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

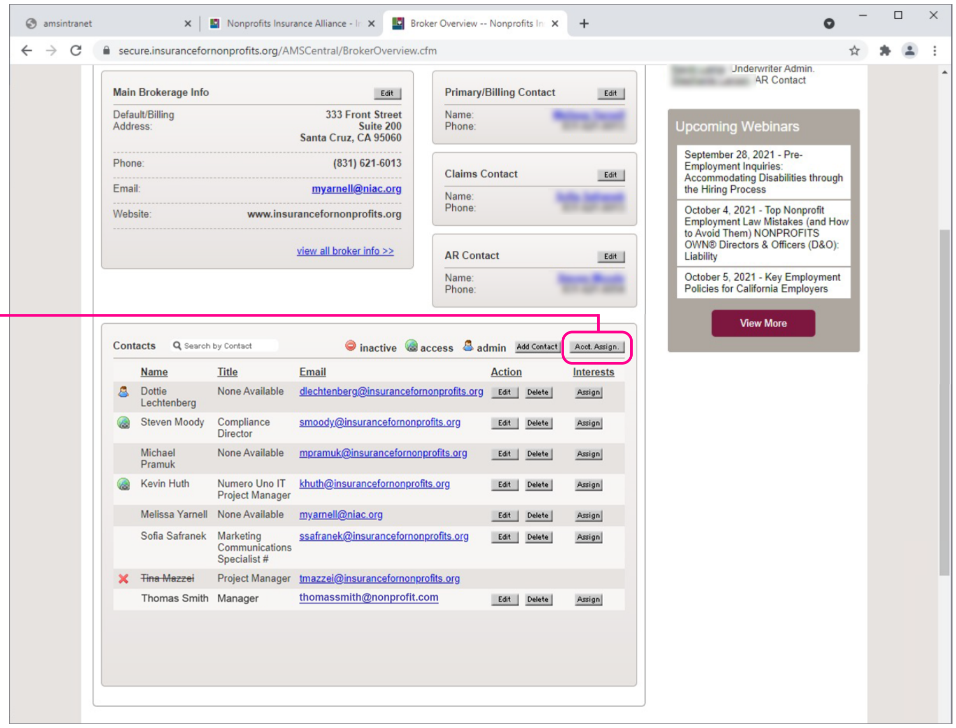
3. Assign a username. Username format is FirstnameLastname. If you receive an error message that the username is unavailable add your broker ID# at the end of the username, i.e. FirstnameLastname00000. Choose the level access (Broker Administrator or Broker (general). Click the **Save Web User Info**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



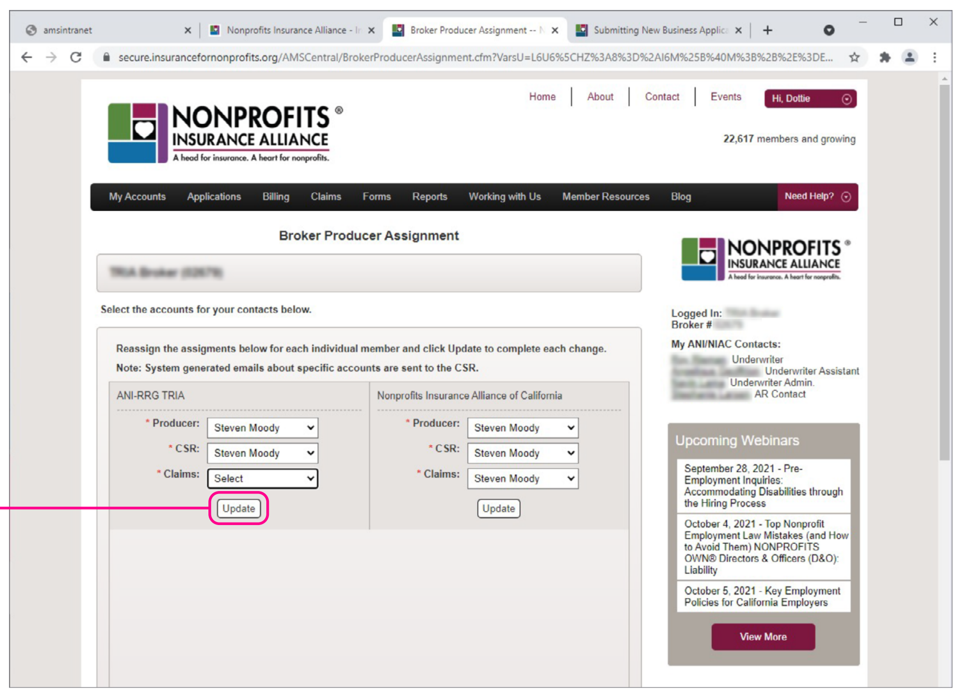
Reassign Broker Contacts to Member/Policyholder Accounts

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**.

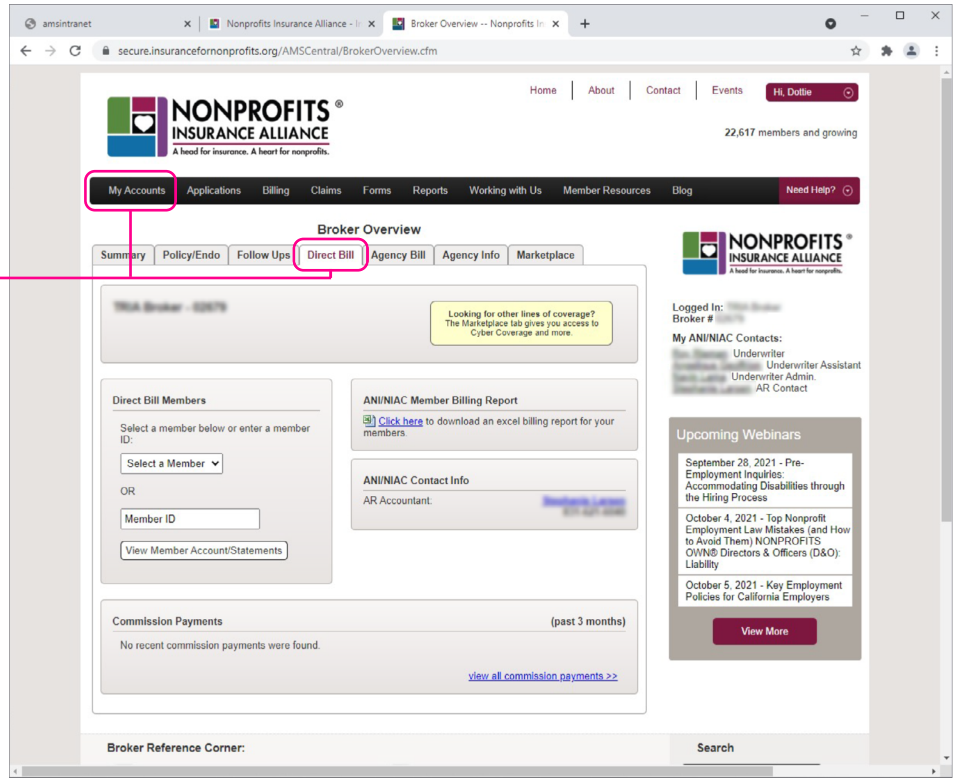


2. On the next screen, use the dropdown menus to select another Broker Contact. Be sure to click the **Update** button. You will receive an email confirming the Member/Policyholder Account reassignment.



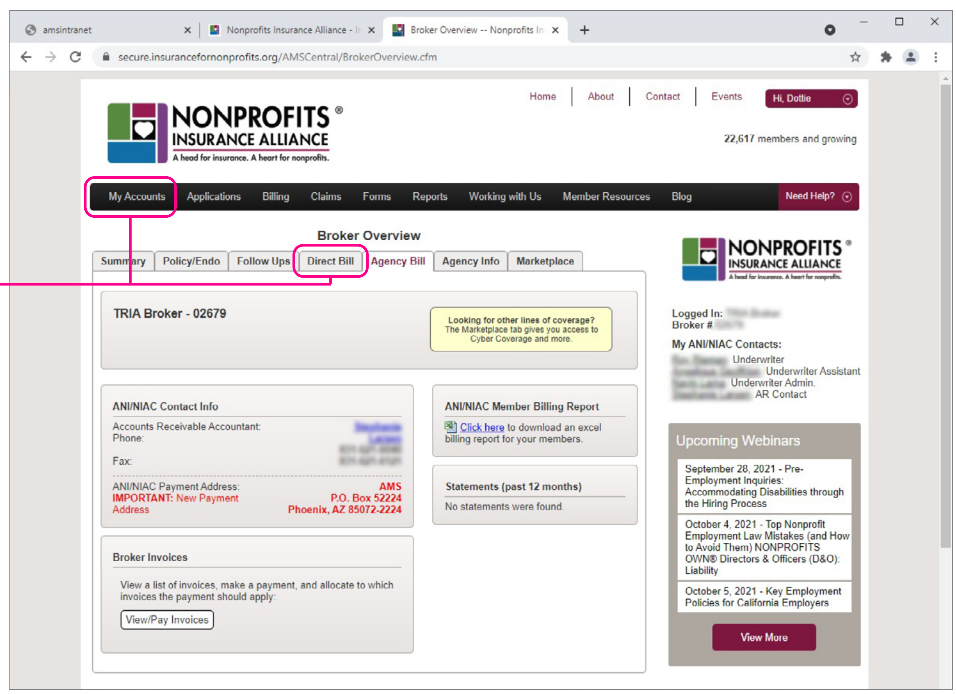
Direct Bill Information

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



Agency Bill Information

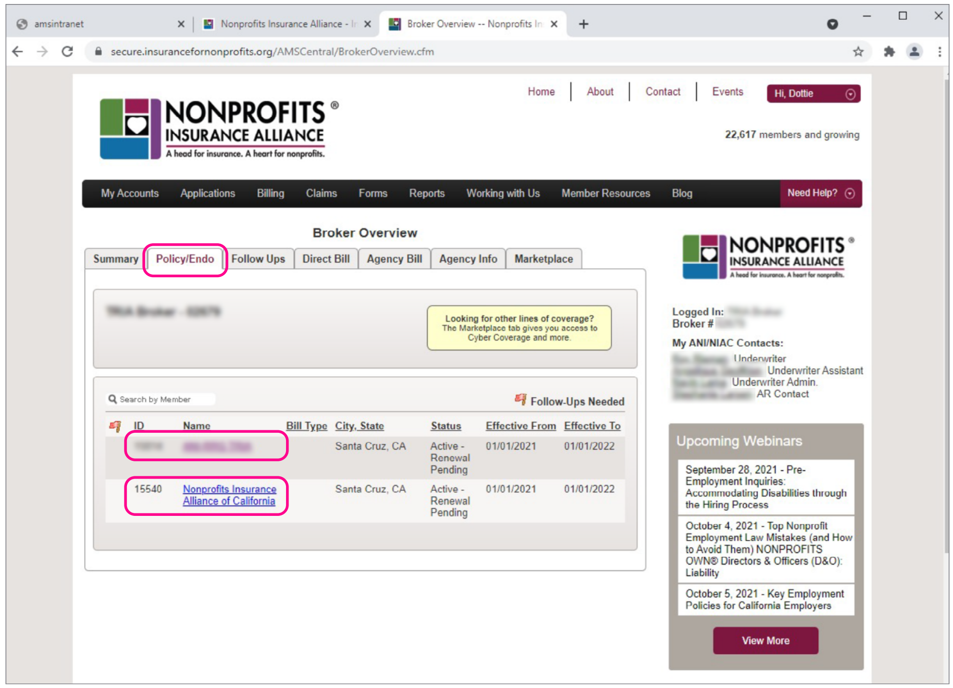
Hover over **My Accounts**, click on **Broker Overview**, then **Agency Bill** tab.



Member/Policyholder Overview

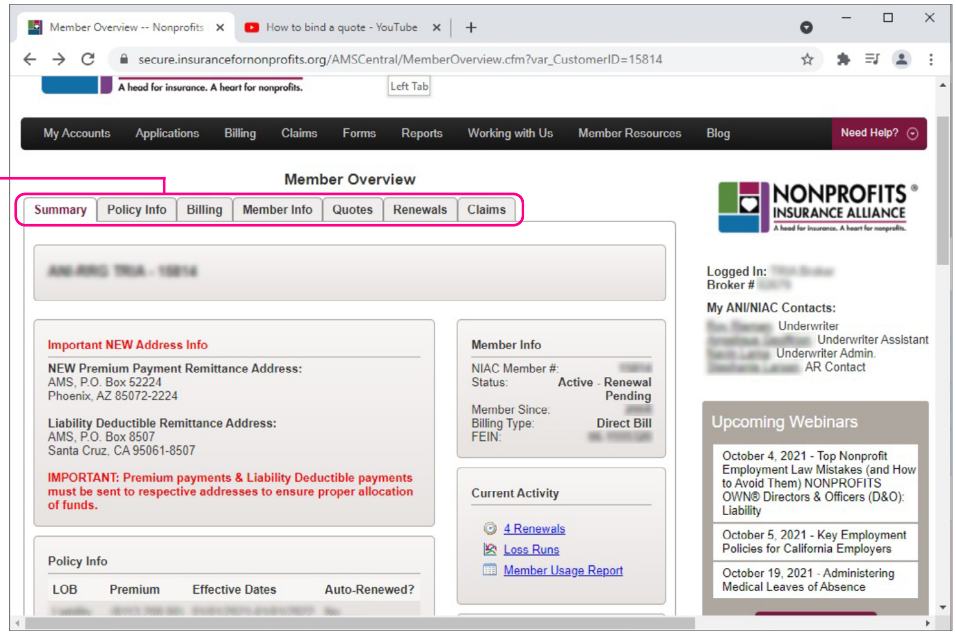
To locate member accounts, hover over **My Accounts** and click on **Policies & Endorsements**.

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



Member/Policyholder Overview (continued)

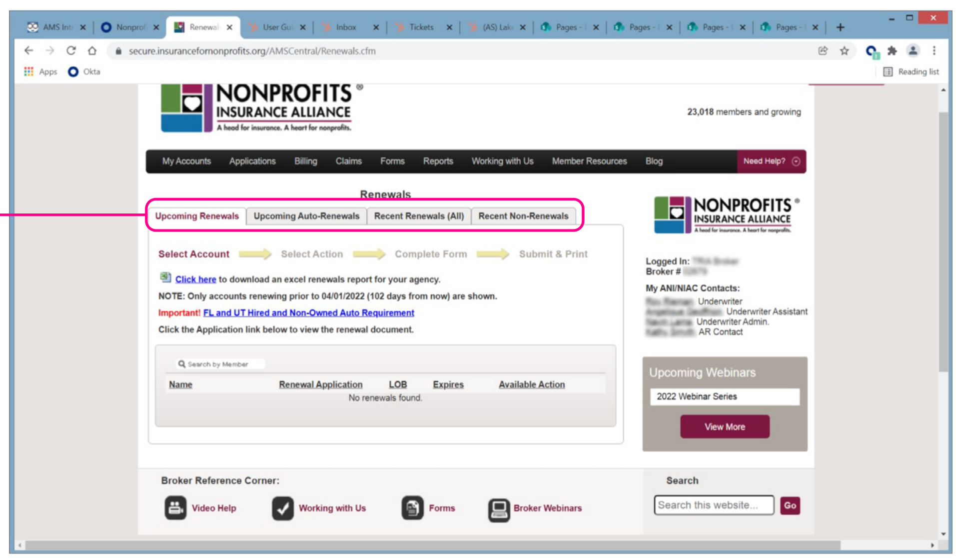
The **Member Overview** contains seven tabs for the account: **Summary, Policy Info, Billing, Member Info, Quotes, Renewals,** and **Claims**.



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.

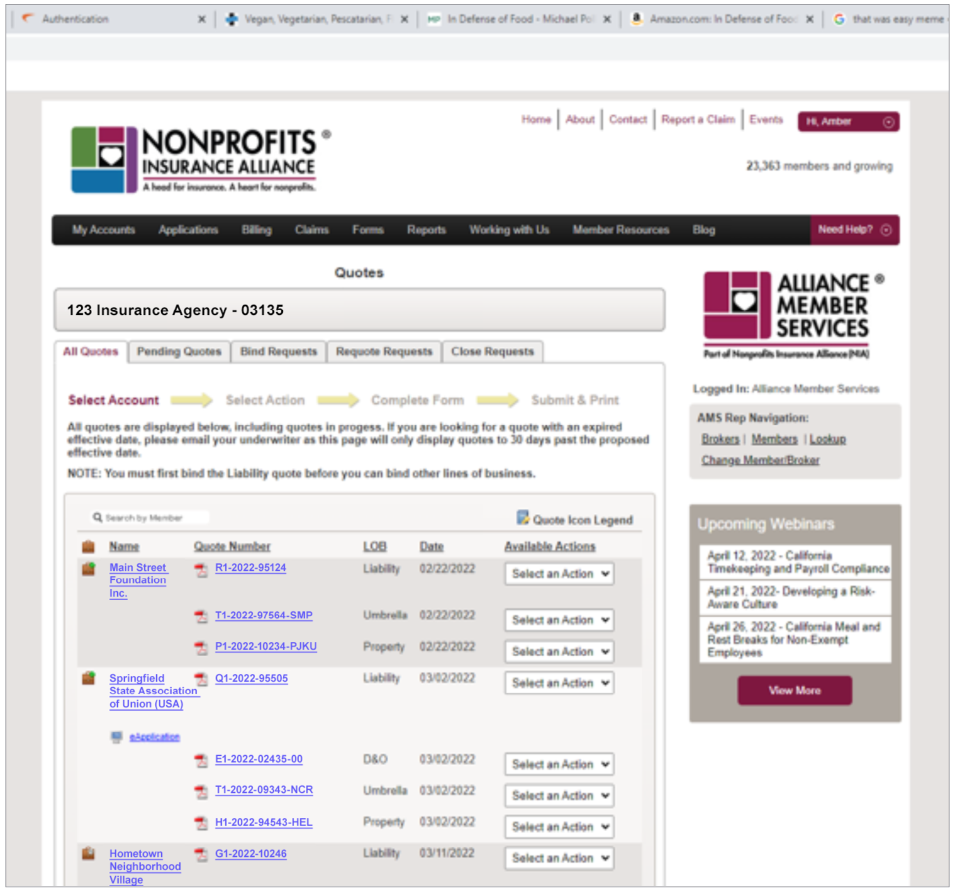


Bind a Quote

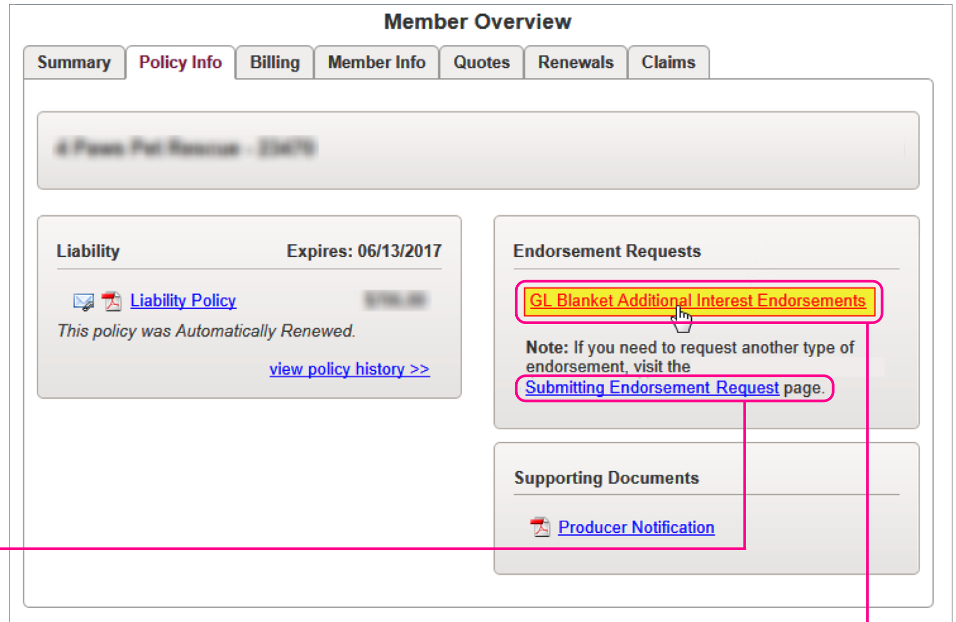
Hover over **My Accounts** and click on **Quotes**. Locate the quote you want to bind and under Available Actions, use the dropdown to Select an Action.

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.

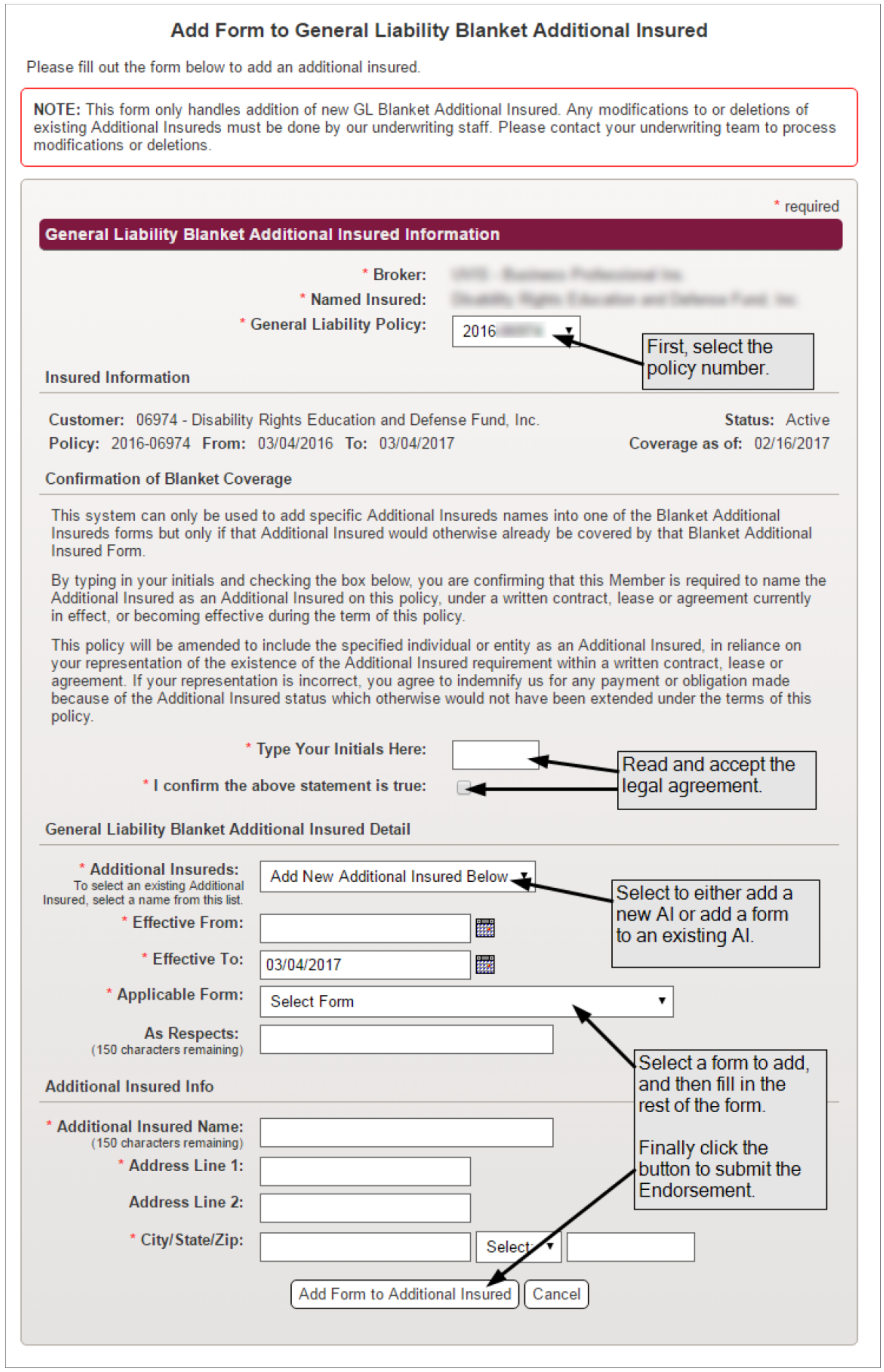
General Liability Additional Interest Endorsement Requests

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.

* required

General Liability Blanket Additional Insured Information

* **Broker:**

* **Named Insured:**

* **General Liability Policy:** 2016

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:**

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 Respects:
(150 characters remaining)

Additional Insured Info

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

* **Address Line 1:**

Address Line 2:

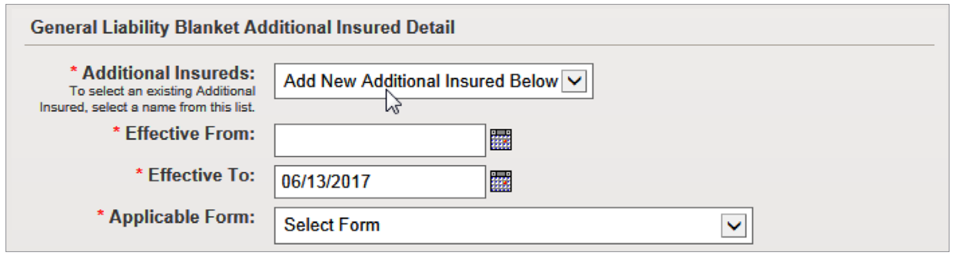
* **City/State/Zip:** Select

Add Form to Additional Insured | Cancel

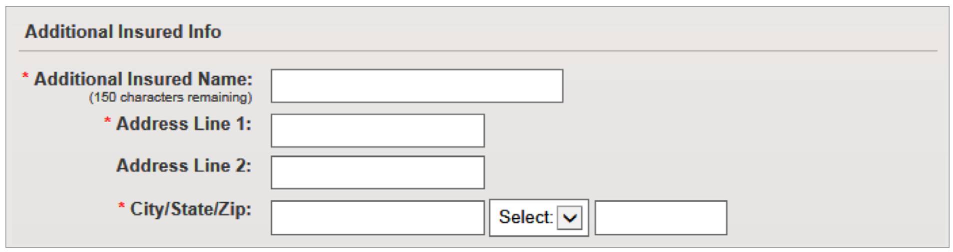
Policy Changes (continued)

Adding a New Additional Insured

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

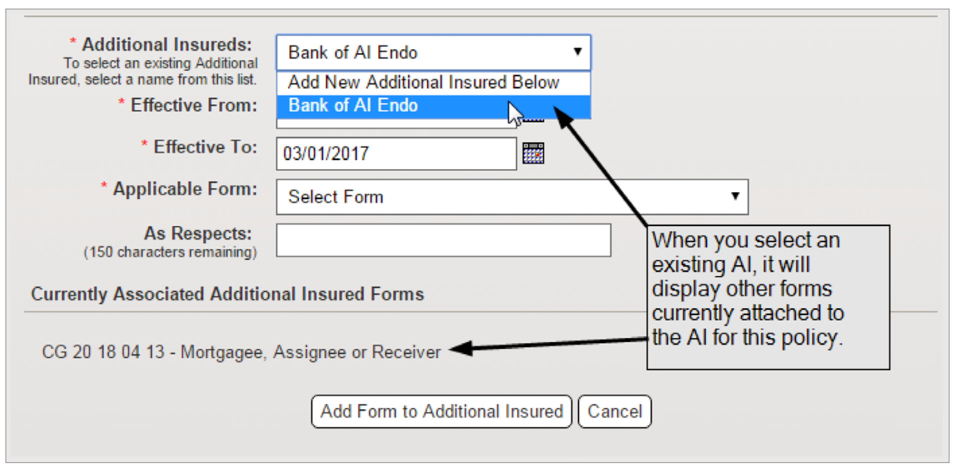


Then fill out the **Additional Insured Info** section below with the new AIs information:



Selecting an Existing Additional Insured

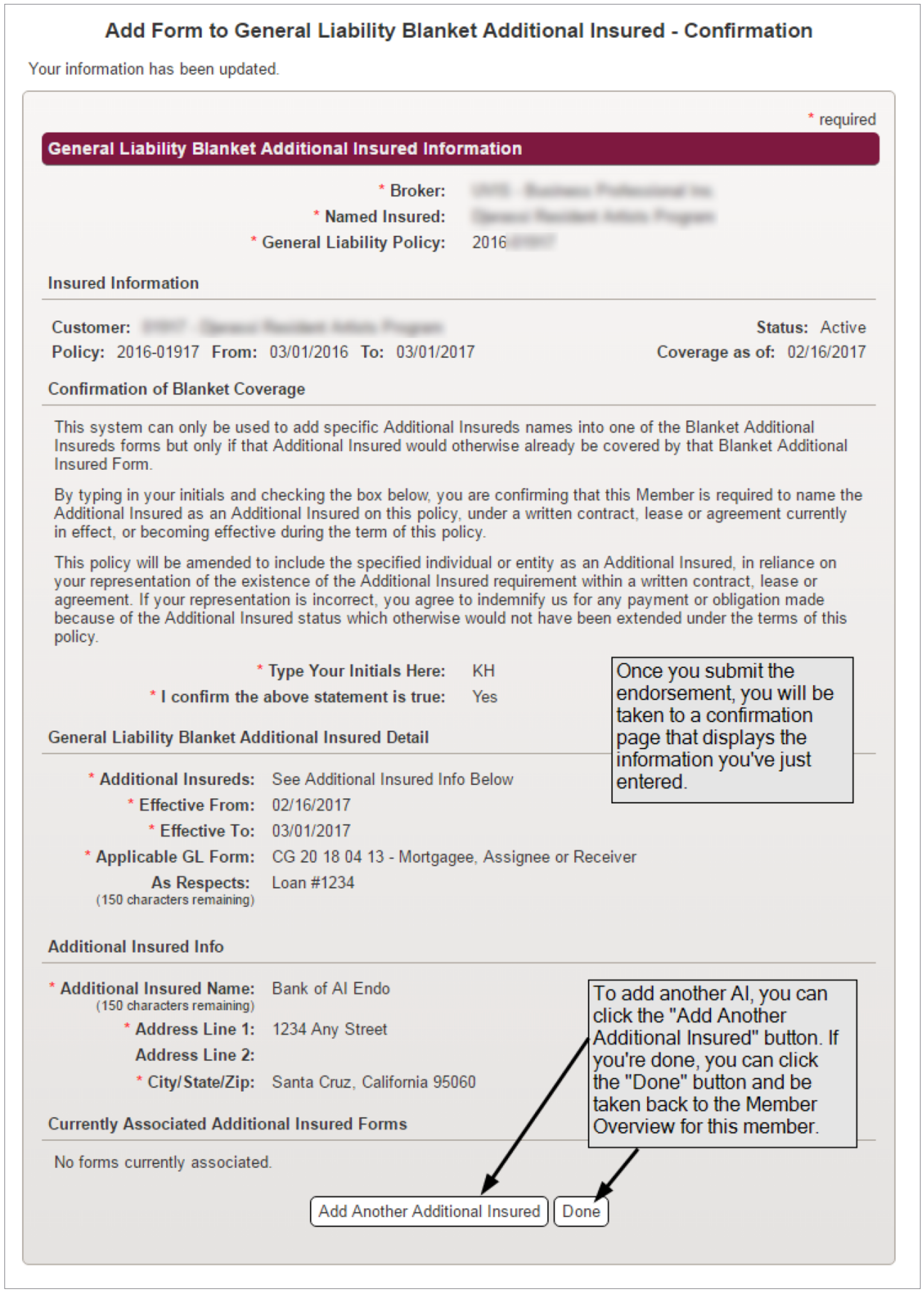
If you want to add a form to an existing AI, you can select them from a list of AIs already associated with this policy:



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:



Add Form to General Liability Blanket Additional Insured - Confirmation

Your information has been updated.

* required

General Liability Blanket Additional Insured Information

* **Broker:** [redacted]
* **Named Insured:** [redacted]
* **General Liability Policy:** 2016[redacted]

Insured Information

Customer: [redacted]
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: (150 characters remaining) Loan #1234

Additional Insured Info

* **Additional Insured Name:** (150 characters remaining) Bank of AI Endo
* **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.

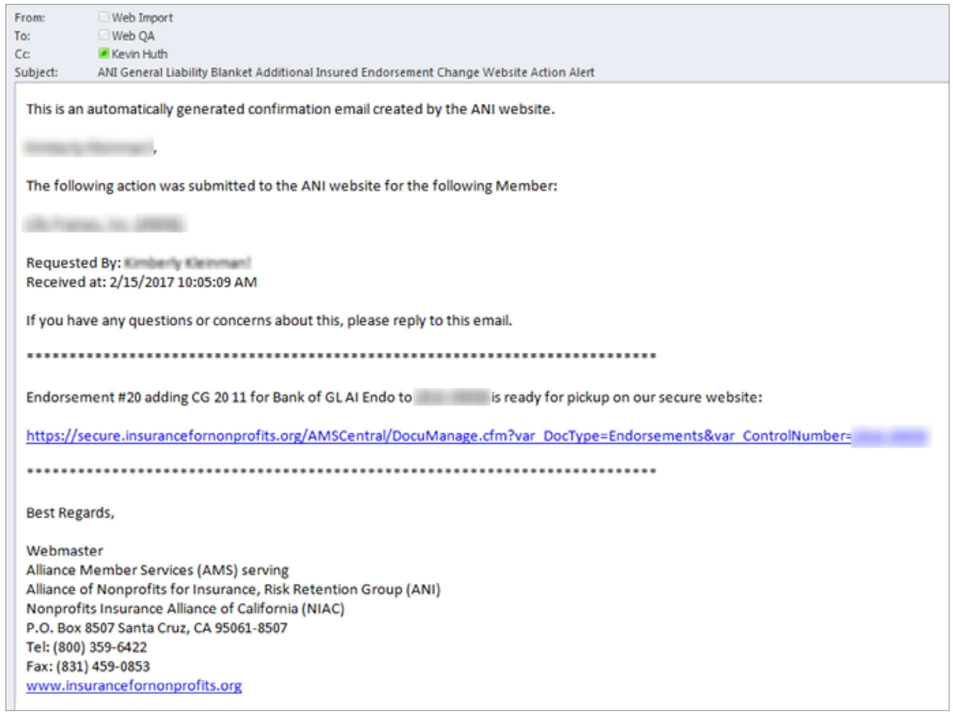
Add Another Additional Insured | Done

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.



From: Web Import
To: Web QA
Cc: Kevin Huth
Subject: ANI General Liability Blanket Additional Insured Endorsement Change Website Action Alert

This is an automatically generated confirmation email created by the ANI website.

[illegible],

The following action was submitted to the ANI website for the following Member:

[illegible]

Requested By: [illegible]
Received at: 2/15/2017 10:05:09 AM

If you have any questions or concerns about this, please reply to this email.

****

Endorsement #20 adding CG 20 11 for Bank of GL AI Endo to [illegible] is ready for pickup on our secure website:

https://secure.insurancefornonprofits.org/AMSCentral/DocuManage.cfm?var_DocType=Endorsements&var_ControlNumber=[illegible]

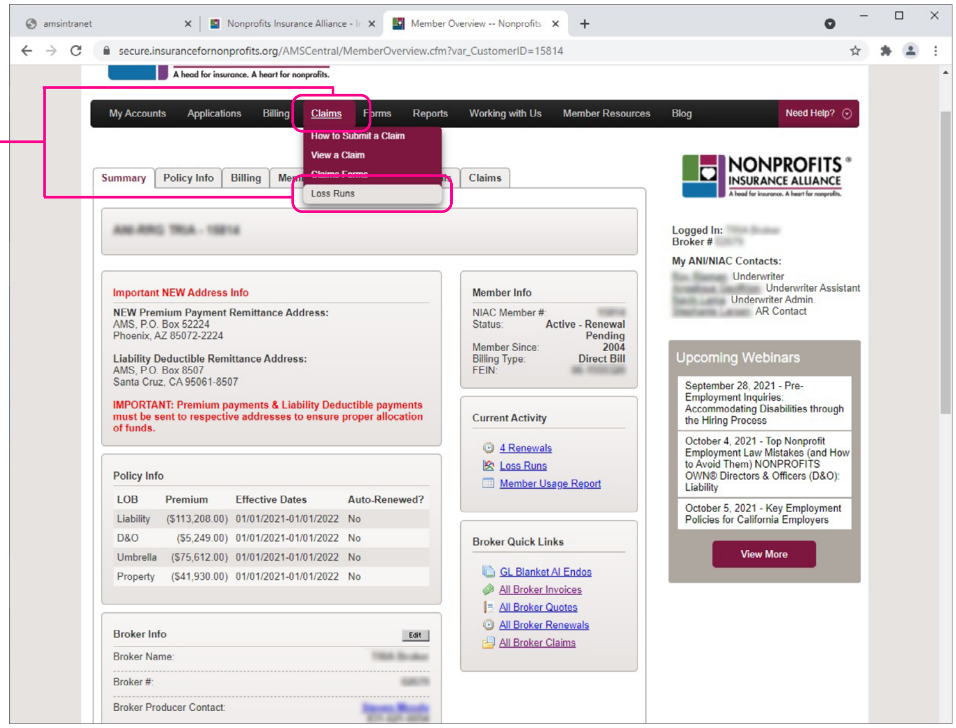
****

Best Regards,

Webmaster
Alliance Member Services (AMS) serving
Alliance of Nonprofits for Insurance, Risk Retention Group (ANI)
Nonprofits Insurance Alliance of California (NIAC)
P.O. Box 8507 Santa Cruz, CA 95061-8507
Tel: (800) 359-6422
Fax: (831) 459-0853
www.insurancefornonprofits.org

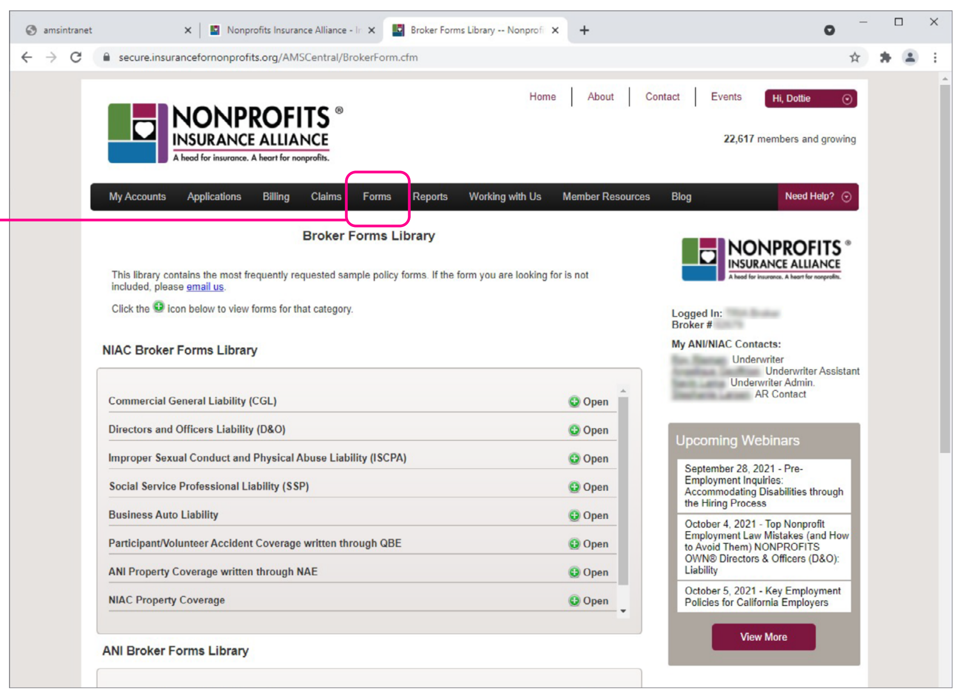
Claims & Loss Data

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.

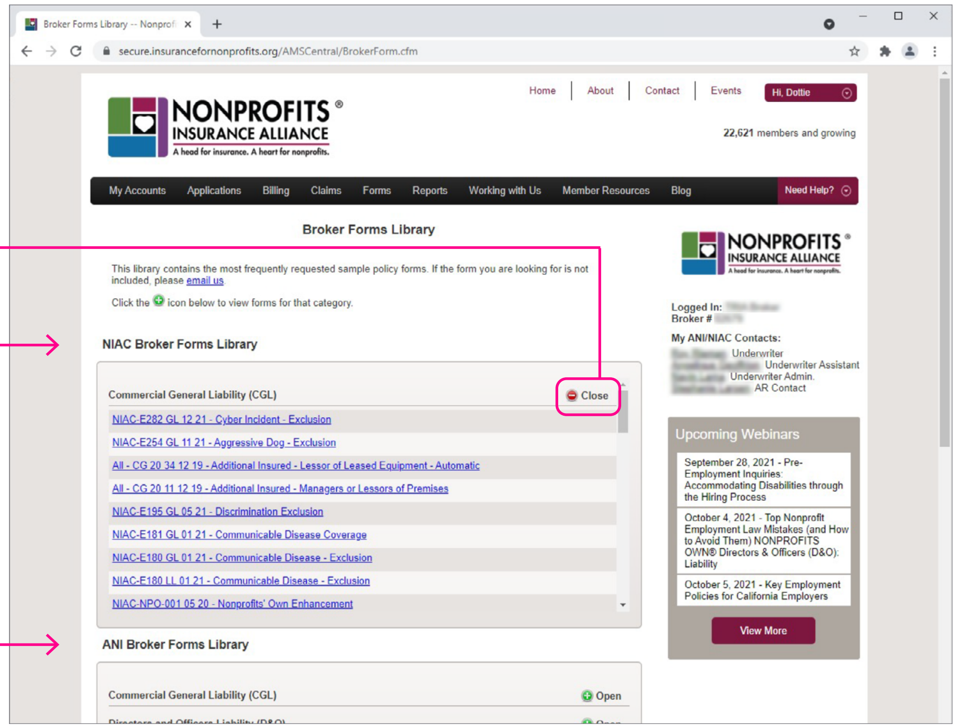


View NIA Policy Forms (continued)

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

NIAC - California Risks

ANI - All Other States

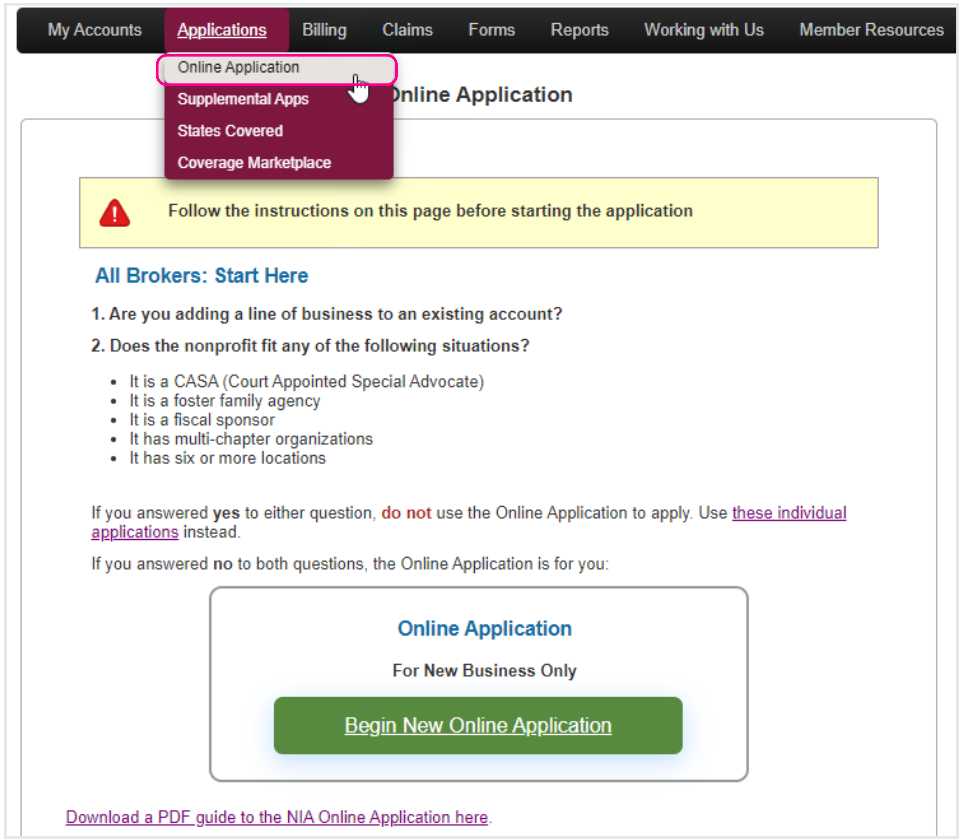


The NIA Online Application

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.



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.

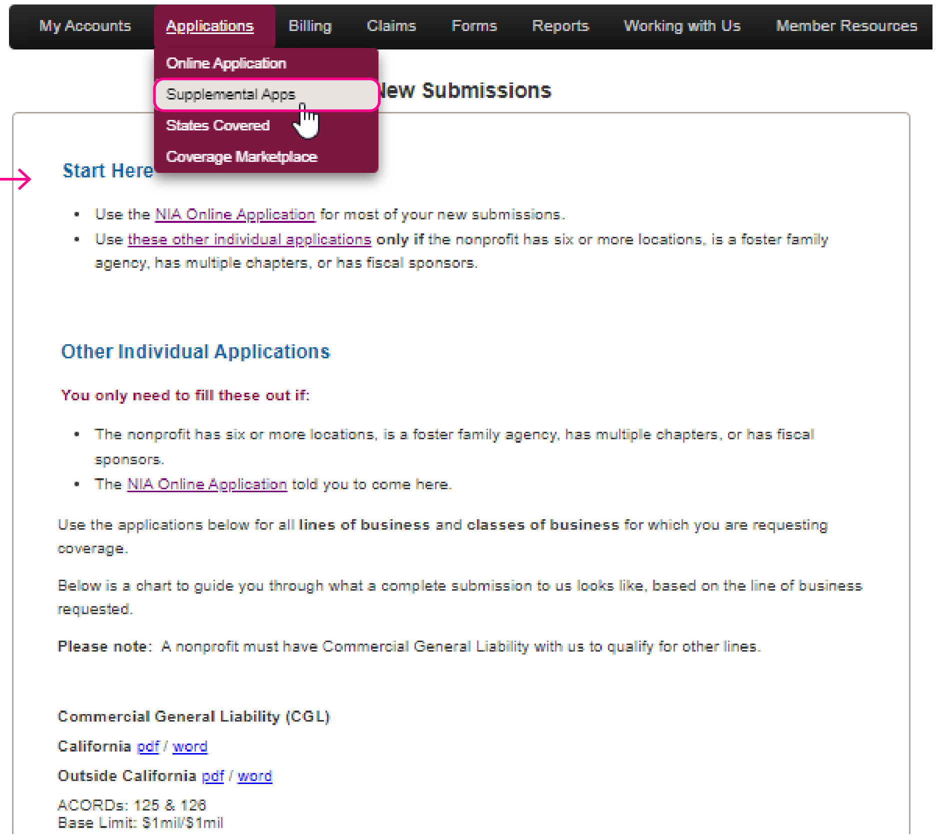
Hover over Applications and select Supplemental Apps (pictured here).

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.

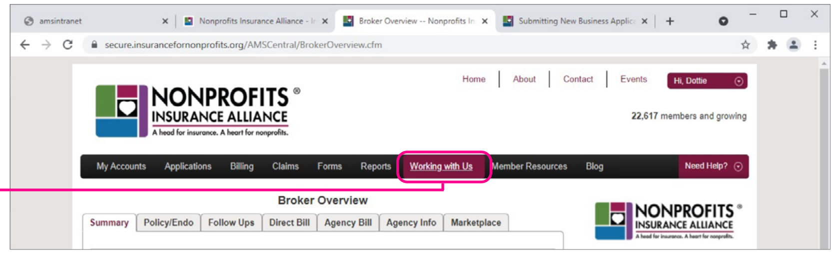
Make sure your submission includes the following:

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

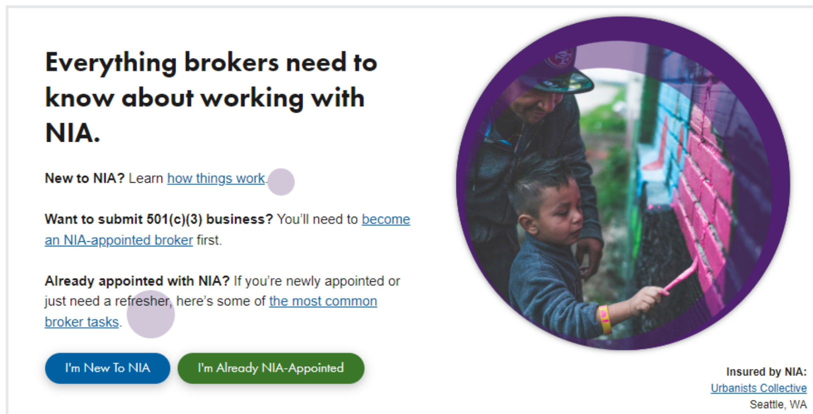


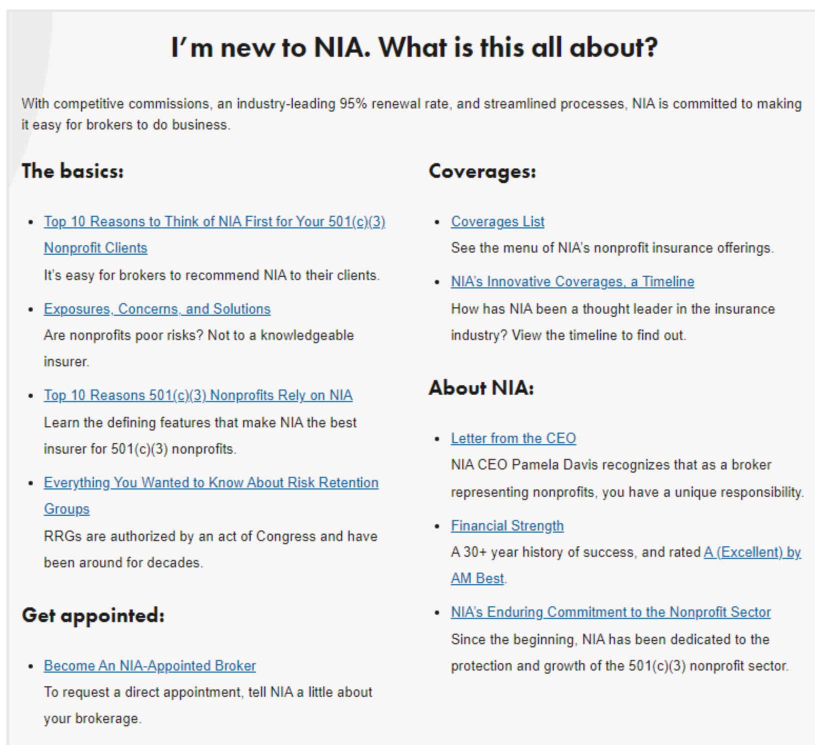
Working with NIA

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.



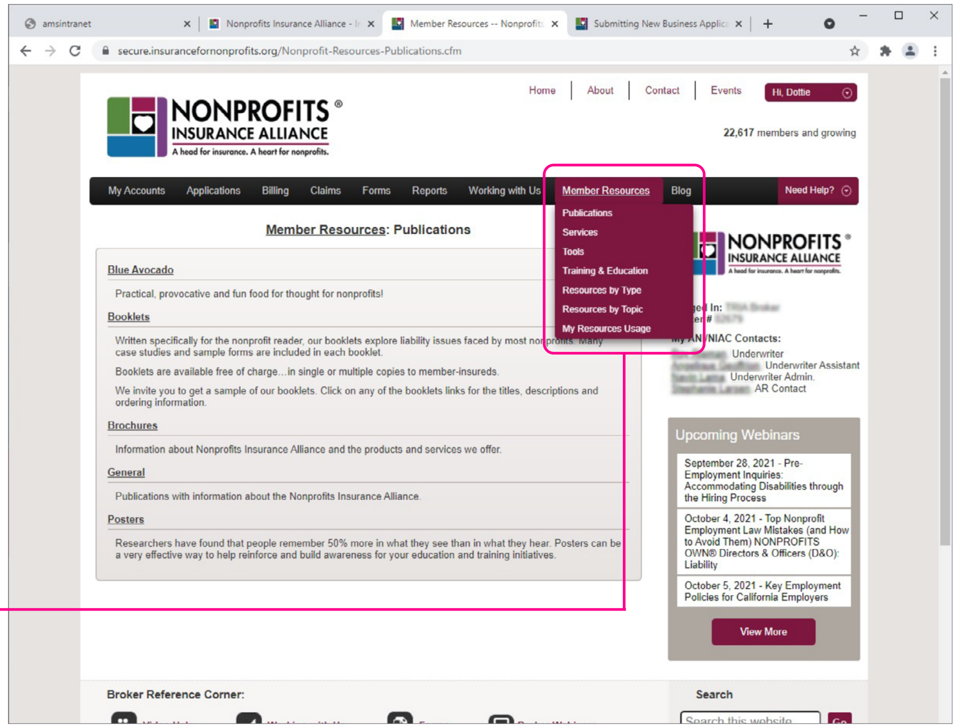
In this section of the website, you will find links to useful brochures about our appetite, where we write business, the NIA Broker Portal, coverage details, risk management resources available to NIA members, and more.





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.