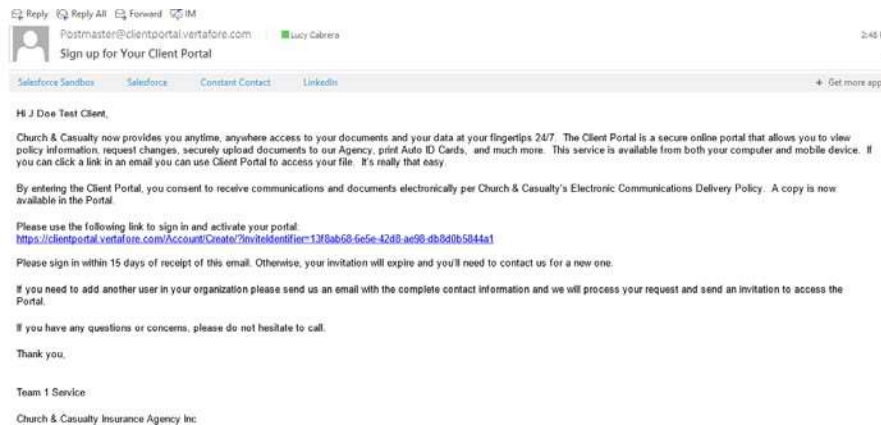




## GUIDE: USING INSURLINK PORTAL

We are happy to provide you with access to your insurance information anytime via the web. By now you should have received an invitation email with information to activate your Portal account. The email may look similar to the one below:



Use the link in the email to open and activate your account for the Portal. If you haven't received the email or you didn't activate the account within 15 days of receiving the email, contact us for a new account activation email.

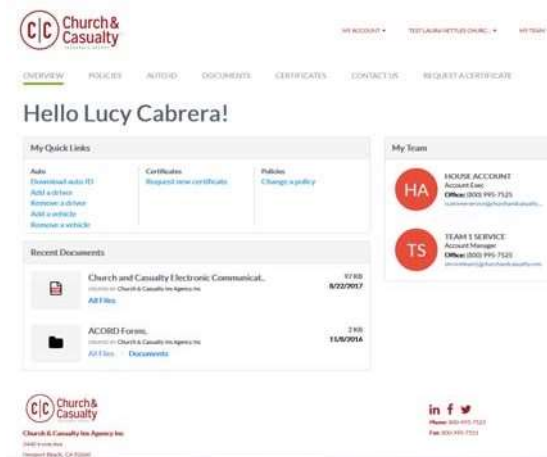
*\*If you haven't received the email in your Inbox, please check your Junk email folder.*

If you have activated your account, you just need to log in with your email address and password at [InsurLink Portal](#)

A screenshot of the Client Portal login page. At the top is the Church & Casualty logo. Below it, the text 'Welcome! Please log in.' is displayed. There are two input fields: one for the email address (containing 'email@emailaddress.com') and one for the password (containing '\*\*\*\*\*'). A 'Log In' button is to the right of the password field. Below the password field is a 'Remember me' checkbox (checked) and a 'Forgot password?' link. At the bottom, there is a line of text: 'By logging in, you agree to the terms and conditions of the "Client Insurance Portal" Terms of Use'.

## WHAT YOU CAN SEE AND DO IN THE PORTAL

You can access the Portal on your desktop computer, smart phone, or tablet providing you with flexibility. The Portal contains tabs of information that includes Overview, Policies, Auto ID, Documents, Certificates, Contact Us, and Request a Certificate. What you see may differ depending on your permissions. The My Quick Links allows you to Add or Remove a vehicle, Download an Auto ID card, Request a certificate or Request a policy change.



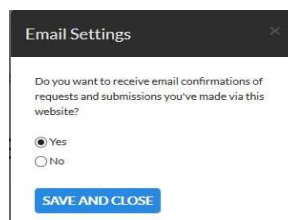
## FUNCTIONS AND FEATURES

The Header includes important menus.



Here is where you can Change Password, change your Email Settings and Log Out. If you need to add users who will have access to your Portal you must send a request to us in writing that they are an Authorized Contact and to add as a user in your Portal.


The Email Settings selection allows you to opt out of email confirmations for requests and submissions you've made on the Portal.



## My Team


The information listed in My Team are the people in our agency assigned to your account (example only below). However, anyone in our service team can assist you.

**My Team**



**HOUSE ACCOUNT**  
Account Exec  
**Office:** (800) 995-7525  
customerservice@churchandcasualty...









---



**TEAM 1 SERVICE**  
Account Manager  
**Office:** (800) 995-7525  
serviceteam1@churchandcasualty.com

## Policies Tab

The policies tab displays all of your current and future policies. Each policy includes the policy number, the type of business (such as Multi-Peril or Business Auto), the policy term, an icon for the insurance company providing the coverage, a View Summary link, a link to a pdf file, or “Not Yet Available” notation.

OVERVIEW	POLICIES	AUTO ID	DOCUMENTS	CERTIFICATES	CONTACT US	REQUEST A CERTIFICATE
<b>11</b>						
	<b># 0123456-09-BINDER</b> Commercial Auto Business Auto	11/8/2016 - 11/8/2017 CURRENT		<a href="#">View Summary</a>		
	<b># 0123456-81-BINDER</b> Commercial Umbrella Umbrella	10/1/2016 - 10/1/2017 CURRENT		<a href="#">View Summary</a>		
	<b># 0123456-02-BINDER</b> Package Multi-Peril	4/1/2015 - 4/1/2018 CURRENT		<a href="#">View Summary</a>		
	<b># 0311060-07-174419</b> Workers Compensation	2/13/2017 - 2/13/2018 CURRENT		<a href="#">View Summary</a>		

Click the View Summary link to see the details of the policy similar to the following example:

<b>POLICY NUMBER: 0123456-09-BINDER</b>																																											
<b>Basic Policy Information</b>																																											
<b>Named Insured</b>						<b>Transaction Information</b>																																					
Firm Name: Tarr Laura Hetties Durrth						Term: 11/8/2016 - 11/8/2017																																					
Address: 123 Main St San Diego, CA 92128-2382						Last Update*: 11/8/2016																																					
Business: (949) 329-3774						Carrier: Church Mutual Insurance Co																																					
Cell: (949) 329-3537																																											
Fax:																																											
Email: lirk@churchandcasualty.com																																											
<b>Commercial Auto</b>																																											
<b>Coverages</b>																																											
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Coverage</th> <th>Limit 1</th> <th>Limit 2</th> <th>Deductible Amount/Type</th> </tr> </thead> <tbody> <tr> <td>Comprehensive</td> <td></td> <td></td> <td>\$500</td> </tr> <tr> <td>Medical payments</td> <td>\$15,000</td> <td></td> <td></td> </tr> <tr> <td>Waiver of Collision Deductible</td> <td></td> <td></td> <td>\$500</td> </tr> <tr> <td>Uninsured motorist Bi-single limit</td> <td>\$2,000,000</td> <td></td> <td></td> </tr> <tr> <td>Committed single limit</td> <td>\$1,000,000</td> <td></td> <td></td> </tr> <tr> <td>Collision</td> <td></td> <td></td> <td>\$500</td> </tr> <tr> <td>Uninsured motorist property damage</td> <td>\$1,500</td> <td></td> <td></td> </tr> </tbody> </table>												Coverage	Limit 1	Limit 2	Deductible Amount/Type	Comprehensive			\$500	Medical payments	\$15,000			Waiver of Collision Deductible			\$500	Uninsured motorist Bi-single limit	\$2,000,000			Committed single limit	\$1,000,000			Collision			\$500	Uninsured motorist property damage	\$1,500		
Coverage	Limit 1	Limit 2	Deductible Amount/Type																																								
Comprehensive			\$500																																								
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Collision			\$500																																								
Uninsured motorist property damage	\$1,500																																										
<b>Vehicles</b>																																											
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Veh #</th> <th>Cont Veh #</th> <th>Year</th> <th>Make</th> <th>Model</th> <th>VIN</th> <th>Liab</th> <th>PIP</th> <th>Med Pay</th> <th>UM/UMI</th> <th>Comp</th> <th>Coll</th> <th>Spec Peril</th> </tr> </thead> <tbody> <tr> <td>00001</td> <td>1</td> <td>2000</td> <td>Chevrolet</td> <td>Suburban</td> <td>30N0C1678G1636</td> <td>X</td> <td></td> <td>X</td> <td>X</td> <td>\$500</td> <td>\$500</td> <td></td> </tr> </tbody> </table>												Veh #	Cont Veh #	Year	Make	Model	VIN	Liab	PIP	Med Pay	UM/UMI	Comp	Coll	Spec Peril	00001	1	2000	Chevrolet	Suburban	30N0C1678G1636	X		X	X	\$500	\$500							
Veh #	Cont Veh #	Year	Make	Model	VIN	Liab	PIP	Med Pay	UM/UMI	Comp	Coll	Spec Peril																															
00001	1	2000	Chevrolet	Suburban	30N0C1678G1636	X		X	X	\$500	\$500																																

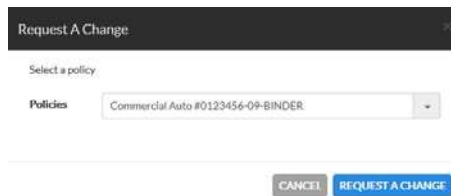
To request a change to the policy do the following:

1. Click the “Change a policy” link located in My Quick Links.



Policies  
Change a policy

2. When the “Request A Change” window opens, scroll to select a policy from the drop down and click Request a Change.



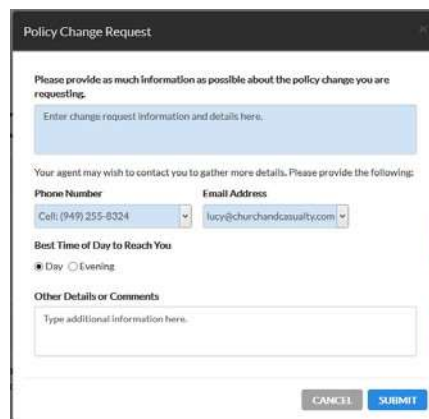
Request A Change

Select a policy

Policies Commercial Auto #0123456-09-BINDER

CANCEL REQUEST A CHANGE

3. In the Policy Change Request window, enter the change you’d like to make. Provide as much information as you can. Complete the Other Details or Comments information and when you’re finished click Submit.



Policy Change Request

Please provide as much information as possible about the policy change you are requesting.

Enter change request information and details here.

Your agent may wish to contact you to gather more details. Please provide the following:

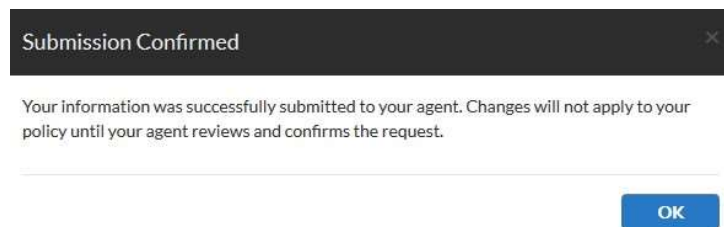
Phone Number Cell: (949) 255-8324 Email Address lucy@churchandcasualty.com

Best Time of Day to Reach You  Day  Evening

Other Details or Comments Type additional information here.

CANCEL SUBMIT

4. Once submitted the Portal will confirm the submission.



Submission Confirmed

Your information was successfully submitted to your agent. Changes will not apply to your policy until your agent reviews and confirms the request.

OK

## Auto ID Tab

If you have an auto policy, the current auto policy will list the vehicles insured on the policy and it appears on the Auto ID tab. On this tab you can view then print an Auto ID card for a policy or view it online or download it.

Being able to view online is handy if you need your Auto ID card, but don't have it with you. You can use your smart phone or tablet to access the Portal and produce an electronic copy of your card.

OVERVIEW	POLICIES	AUTO ID	DOCUMENTS	CERTIFICATES	CONTACT US	REQUEST A CERTIFICATE
<div style="text-align: right;"> <input type="text" value="Search by year, make, model, VIN, or policy #"/> <input type="button" value="Q"/> <input type="button" value="Filter"/> </div>						
	<b>2014 Interstate Trailer</b> <small>VIN # 4RACS1629EK051849</small>	<b>11/8/2016 - 11/8/2017</b> <small># 0123456-09-BINDER</small>	Test Laura Nettles Church	<b>ACTIONS</b> ▾ View Download Email		
	<b>2014 Interstate Trailer</b> <small>VIN # 4RACS1428EK051179</small>	<b>11/8/2016 - 11/8/2017</b> <small># 0123456-09-BINDER</small>	Test Laura Nettles Church			

## Documents Tab

On the Documents tab you'll see documents we shared with you, as well as any you have uploaded to the Portal. The documents are stored in a secure encrypted form.

OVERVIEW	POLICIES	AUTO ID	DOCUMENTS	CERTIFICATES	CONTACT US	REQUEST A CERTIFICATE
<div style="text-align: right;"> <input type="text" value="Search for Folders and Documents"/> <input type="button" value="Q"/> <input type="button" value="Filter"/> </div>						
<div style="display: flex; justify-content: space-between; align-items: center;"> <span>All Files ▾</span> <span>ADD DOCUMENT</span> <span>NEW FOLDER</span> <span>SHARE IN EMAIL</span> </div>						
	<b>Documents</b> <small>CREATED BY Church &amp; Casualty Ins Agency Inc</small>	<small>CREATED ON</small> 6/23/2016	<small>1 Items</small>	<b>ACTIONS</b> ▾		
	<b>Church and Casualty Electronic Commu...</b> <small>CREATED BY Church &amp; Casualty Ins Agency Inc</small>	<small>CREATED ON</small> 8/22/2017	<small>97 KB</small>	<b>ACTIONS</b> ▾		

Use the Actions drop-down to download, move, rename, delete, or Share a link to the document in an email. To add, a document, click Add Document above the document list.

	<b>Upload Folder</b> <small>CREATED BY Lucy Cabrera</small>	<small>CREATED ON</small> 11/9/2016	<small>1 Items</small>	<b>ACTIONS</b> ▾ Open Move Rename Delete Share in Email		
--	--	--	------------------------	--	--	--


## Certificates Tab



If you have requested a certificate or evidence of property insurance you may see the documents in the certificate tab.

REQUEST CERTIFICATE					
<input type="text" value="Search by certificate # or description"/> <input type="button" value="Q"/> <input type="button" value="Filter"/>					
	<b># CL16111851860</b> <small>Test Cert of Liability</small>	<b>Certificate of Liability</b> <small>ACORD 25</small>	None	ACTIVE	View Master

When you click a certificate in the grid, another web page opens showing all the current certificate holders. You can view and print an existing certificate, download or email a certificate.

CERTIFICATE HOLDERS [← BACK TO LIST](#)

 # E 16111809892 Evidence of Property Insurance ACORD 27 1 Holder ACTIVE  
Test EPI

Holders   

Test Mortgagee	ISSUED	JOB #	DESCRIPTION OF OPERATIONS	ACTIONS =
123 Main St Anywhere, CA 92660	11/18/2016			<ul style="list-style-type: none"><li>View</li><li>Download</li><li>Email</li></ul>