Intro to CustomerEngage

The Online Portal for CopperPoint Policyholders

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Additional help and more detailed tutorials for many aspects of the CopperPoint Portal can be found at copperpoint.com/login/portal-help.

Registered users may log in directly at ce.copperpoint.com.

Registration

You can register for the CopperPoint Portal with your Account and Policy numbers via the Sign-up option on the Customer Portal login page. If your Account already has a user with admin permissions, that user can add users via their User Administration Tab. After the initial user registration, the Sign Up link will no longer work for that account.

User Administration

- The first user to register for the CustomerEngage Portal under an Account will be given full admin permissions.
- Users with Account Admin permissions can access the User Admin tab to add, modify, and remove users. Account Admin permission can be granted to multiple other users.
- Shortly after being added, new users will receive a registration email to establish password.
- Account Admins can also modify the email notification settings of all users.

Billing

- Making a Payment
  - Payments can be made via the Billing tab or selecting the Quick Link on the Portal homepage. Either a credit card or bank account may be used for payment; however, if the amount due is greater than $10,000, only ACH (bank) info may be entered. Once payment has been made, the registered user will receive a confirmation email, and the account balance will be updated on the Billing page.
- Automatic Payments (ACH/EFT)
  - You may enroll in automatic payments via the Billing tab. Under the Make a One-Time Payment button there will be a link to Set up Automatic Payments. Payments will be automatically withdrawn from your bank account on the due date of your invoice. After setting up AutoPay, the Billing tab will show additional options for changing banking information and cancelling automatic payments.
- Payroll Reporting
  - If your policy is on a payroll reporting plan, you may access your reports via the Payroll Reporting tab or the Quick Link on the Portal homepage. From this screen, you may start a new payroll report, complete a report previously started, or request a change to a completed report. Once payroll has been submitted, the payroll report advice will be shown on the Payroll Documents tab within a few minutes.

Reporting and Viewing Claims

- From the Claims tab, the screen will display Open claims for all lines of business, sorted by most recent Date of Loss. Claims in draft status (not yet submitted) have a claim number starting with “T.” These drafts will stay in view for 30 days.

- To file a new notice of loss on a workers' compensation policy, select the File a Claim button on the Claims page or the Quick Link on the Portal Homepage. Claim number and adjuster contact info will be viewable upon submission.
- Adjuster notes are available when selecting the details for a specific claim.

Policy Details and Documents

To view policy details and documents, click on the Policy tab to access the policy details page. Listed will be policies for all lines of business on the account. In-force and scheduled (future) policy terms will be shown, or the most recent expired or cancelled policy term for each line of business. If any policy is subject to pending cancellation, it will be identified in the Status column and a blue informational message will appear at top. If there is an independent agent associated with the policy, the agency name and phone number will appear. Selecting specific policies will allow you to access the Policy Documents area, which contains policy packets, policy changes, policy endorsements, and notices of cancelation.

Loss Runs

Clicking on the Request Loss Run button at the top of the Claims will submit your request. A PDF report will be emailed to the user making the request. This report will provide a historical snapshot of your organization's loss performance as well as summarized claim information for each year.

Electronic Notifications

Users with the Account Admin permission can enable notifications for each user via the User Administration tab.

Signing up to receive notifications will enable **all** available account event notifications.	Billing invoice is ready
	Billing invoice is unpaid and due soon
	Account/Policy document has been posted
	Payroll report is unfinished and due soon