

## Intro to ProducerEngage

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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](https://copperpoint.com/login/portal-help).

### Registration

You can register for the CopperPoint Portal by contacting your agency's Portal administrator. Users with admin privileges can add/modify user access via their User Admin tab. New users will receive a registration email shortly after being added.

### Homepage

- The CopperPoint Portal uses account numbers to identify specific companies by FEIN. An account number will begin with 50000#####. Each account can have multiple policy numbers that should be seven digits. On the homepage you can search by account number, policy number, or named insured. You can select the policy number to be taken directly to that policy or the account number to see the overall account details.
- Before searching for a specific account/policy, the homepage should list all delinquent accounts under the producer codes that you have access to.

### Policy

- Selecting a policy number or finding the policy via the Policy tab will take you to the policy summary page. This page will provide details such as policy period, status, premium, and recent policy transactions. The summary page should also display cancelation status, date, and reason for cancelation.
- The Policy view/tab will have a Documents tile that will have policy and billing documents. Such as policy packets, endorsements, and invoices.
- Many pages will have a drop-down menu to change policy periods.
- The Billing tile will provide details such as policy billing status, amounts due, download transaction ledger.
- To make a payment, select the Account in the upper left corner and navigate to the Billing tile. You will then see a button to Make Payment.
- The Payroll Reporting tab will allow viewing and reporting payroll.
- The Claims tile allows users to view Claims, read adjuster notes, request claim reports. Loss runs and claims status reports will be emailed to the user soon after selecting the button to request them. The button will then be greyed out for the next 24 hours.

### Account Billing tile

- From the Account level users can navigate to the Billing tile. Where users can make a payment, view account AutoPay status, billing status, recent transactions, policies owned by account

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## New Business Submissions

- Select +New Submission orange button in the upper-right corner. ProducerEngage will accept workers comp submissions in following states: AZ CA CO NM NV UT (CA effective 4/1/22). Enter your submission data or upload your ACORD from the Customer Details page.
- To continue a submission previously left, find the Account and select the draft from Submissions in Progress tile.
- Straight-through processing or agent binding authority is available for all states. Submissions that are STP-eligible will have an Issue button on the final quote screen. After selecting payment plan, the policy will be bound and issued and available for download. For more information view submissions video or speak with your Business Development representative.

## My CopperPoint

- Selecting the My CopperPoint tab will open a new tab to the exclusive digital marketing experience.

## Commissions

- Commissions statements are available to download via the Commissions tab, for those who have the commissions permission. PDF and Excel versions are available for CopperPoint producer codes.

## User Admin

- Users with User Admin permissions can access the User Admin tab of the Portal, where other users' permissions can be added, removed, or modified. Admins can also modify the email notification settings of their users.
- Access can be granted/restricted based of off specific producer codes, which allows customization of access for agencies with multiple branches/subcodes.
- Admins can export a spreadsheet of all users.

## My Profile/Electronic Notifications

- From the My Profile screen, users can view current access (permissions and producer codes).
- Agents now have the option to receive various notifications for all policies under their respected producer code. These notifications can be opted into via Profile tab inside the CopperPoint Portal.

<b>Invoice Ready</b>	An invoice has been billed and is ready
<b>Invoice Reminder</b>	An invoice is unpaid and due soon
<b>Notice of Cancellation</b>	A Notice of Cancellation has been generated
<b>Payroll Reminder</b>	A Payroll report is unfinished and due soon

Admins can also modify the notifications of their users via the User Admin tab.