Notable Changes to CustomerEngage Portal

Last Updated February 1, 2022

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

Registration

Policyholders can now register for the CustomerEngage Portal using Account and Policy numbers (FEIN not needed). If the Account already has a user with admin permissions, that user can add users via their User Administration tab.

Notifications

Policyholders can now receive emailed notifications regarding their Account. These notifications include billing invoice is ready, billing invoice is unpaid and due soon, Account/Policy document has been posted, and payroll report is unfinished and due soon. Users with the Account Admin permission can enable these 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

AutoPay via Online Portal

Policyholders can now enroll in automatic payments via the CustomerEngage Portal. The user must have the Billing permissions to access the Billing tab. From the Billing tab, you will see a link to Set up Automatic Payments. The user will be asked to input routing and account numbers for their bank to enroll in ACH/EFT. After enrollment, bank information may be changed, or automatic payments may be canceled.

Report Claims for California Policies

Policyholders will be able to use the CustomerEngage Portal to report their California policy claims before the PacificComp policy (WA-######) and renewed into the CopperPoint system (Guidewire). Policyholders may be registered by request to PortalAdmin@copperpoint.com. Only the claims functions will be enabled; **until the policy renews, the policyholder will continue to make payments and report payroll through the Pacific Comp portal.**