Notable Changes to PE Portal

Last Updated February 1, 2022

Help and tutorial documents can be found at copperpoint.com/login/portal-help.

Agency User Administration

Agents can now request access to the CopperPoint Portal via their designated agency system admins. Users with Admin permissions can add users directly into the Portal via the User Admin tab. Newly added users should receive a registration email shortly after their admin has completed the setup process.

Access can now be assigned and managed based off specific producer codes. Admins can select all, a few, or one producer code for their users to access, allowing agencies to better manage multiple offices/branches and customize access.

Detailed instructions can be found inside the "Agency User Administration" help document.

Make a Payment

Agents can make payments on behalf of their insureds via the CopperPoint Portal. From within an account, you can select the Billing tile to access the button to Make Payment.

CA Policies

California submissions and renewals (previously PacificComp policies) will now be processed on the CopperPoint Guidewire. New business submissions for policies effective as of 4/1/2022 and policies renewing after 6/1/2022 effective will be viewable inside the CopperPoint Portal.

STP

The CopperPoint Portal has also been updated to accommodate Straight Through Processing (STP) of submissions that match our guidelines. Policies that fit our STP appetite can be bound and issued completely by the agent inside the CopperPoint Portal for all Guidewire states (AZ CA CO NM NV UT).

Claims Status Reports

Claims Status reports that were previously found inside the PacificComp Portal have been added to the CopperPoint Portal. This report can include the adjuster's case summary, reserve details, and plan of action.

Commissions

Commission statements are now available online in Excel format, along with the existing PDF format, to those who have the proper permission.

Electronic Notifications

Agents now have the option to receive various notifications for all policies under their respective producer codes. These notifications can be opted into via the My Profile tab inside the CopperPoint Portal.

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

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