

Loss Runs on ProducerEngage

Loss runs can be accessed for the producer of service for all policies. Loss runs are individual to the line of business.

FIND CORRECT POLICY

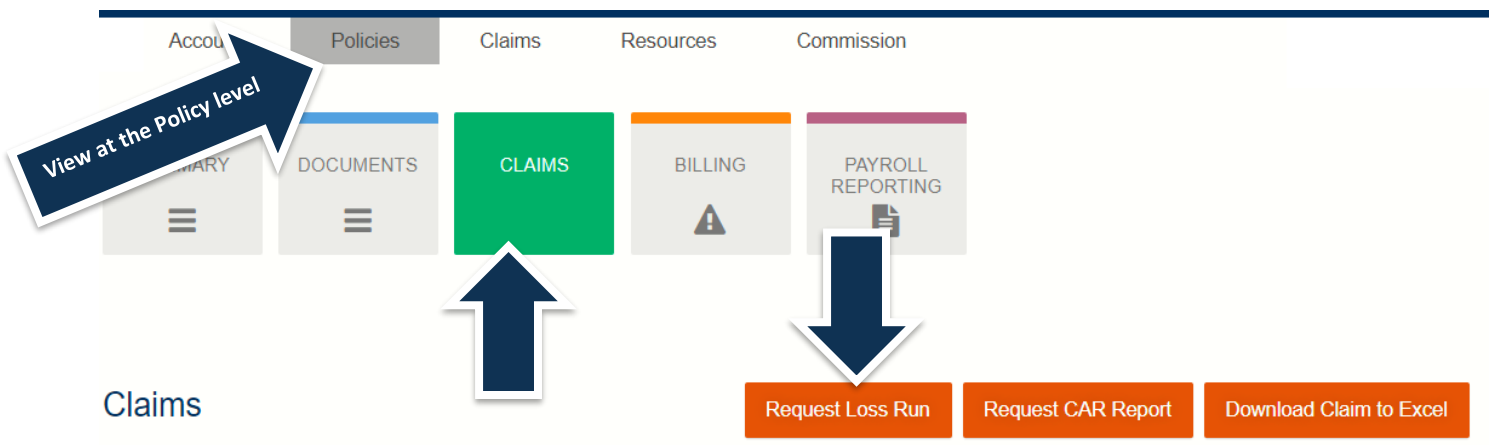
Use the text search box to find the correct accountholder by name. You may also click on the Policies tab > Policies In Force green square to see a list of policies.

For workers' comp policies, you may also search by policy number (10#####).

Loss run documents are stored at the policy level. If you are viewing the account (Accounts tab will be in gray at top), select an issued policy in blue from the summary page to view the policy level.

REQUEST DOCUMENTS

From policy view, click on the green Claims square and find the three orange buttons for claims reports.



The screenshot shows the top navigation bar with tabs: Accounts, Policies, Claims, Resources, and Commission. Below this is a sub-menu with options: SUMMARY, DOCUMENTS, CLAIMS, BILLING, and PAYROLL REPORTING. The CLAIMS option is highlighted in green. A blue arrow points to the CLAIMS option with the text "View at the Policy level". Below the sub-menu, the word "Claims" is displayed. To the right of "Claims" are three orange buttons: "Request Loss Run", "Request CAR Report", and "Download Claim to Excel". A blue arrow points down from the PAYROLL REPORTING option to the "Request Loss Run" button.

After receiving your confirmation, the loss run will be emailed to you in PDF format within 24 hours. The report may be sent as soon as within the hour (during business hours), so be sure to check spam or junk filters.

Please send a request to PortalAdmin@copperpoint.com if you need further assistance.