



# USER GUIDE POLICY MANAGER

This guide will help you manage your policies online.



## VIEW POLICIES

See policies and coverage you have with RCU Insurance Services.



## ACCESS DOCUMENTS

Includes applications, quotes and any new documents you have signed, or that require your response. All policy documents will be accessible for covered policies as well.



## OBTAIN AUTO ID CARDS

If you have lost your insurance card and need a replacement.



## ISSUE A CERTIFICATE

Request a new certificate of coverage for your Business/Commercial policy.



## VIEW MY INFORMATION

### View My Information:

Verify your personal contact information is accurate.

### Request to Change Information:

Update your personal information if you have moved or changed your name or phone number.

### Request to Change My Policies:

Make any needed changes to a current policy, i.e. liability changes or vehicle changes.

### Upload Documents:

Upload documents directly to RCU Insurance Services.



## MANAGE CERTIFICATES

### Reprint Certificates:

If you have a current certificate and need to reprint the certificate for a specific job as evidence of coverage.

### Request a Certificate:

Request a new certificate of coverage for your Business/Commercial policy.

### Update Holders Information:

Update personal information for any specific holder within a certificate.

### View Cert Holder Spreadsheet:

Print a clean list of certificate holders' information for your records.

### How to Issue a Certificate:

Tutorial on how to generate a certificate.



## MANAGE VEHICLES

### Request to Add a Vehicle:

Add a new vehicle here.

### Request to Change a Vehicle:

Modify information for a vehicle that is currently covered, e.g., vehicle information or insured name.

### Request to Remove a Vehicle:

Remove coverage for a vehicle that is no longer in the policy holder's possession.

### View Vehicle Spreadsheet

View details for all vehicles on your policy.



## MANAGE DRIVERS

### Request to Add a Driver:

Add a driver to your policy, e.g., a newly license teenager.

### Request to Change a Driver:

Make changes to a current driver listed on your policy, e.g., you have a commercial vehicle and need to edit a driver.

### Request to Remove a Driver:

Remove a driver from your policy, e.g., your child moves out or a commercial driver no longer works for your company

### View Driver Spreadsheets

View details for all insured drivers on your policy.



## REPORT A CLAIM

### View My Open Claims:

Review all open claims on your policy.

### Report a Business Auto Claim:

Report a claim is a covered vehicle on your business/commercial policy has been in an accident.

### Report General Liability Claim:

Complete a general liability claim if someone was injured..

### Report Property Claim:

Enter a claim if your property was damaged by hailstorm, fire or flood.

### Report Other Claim:

Enter a claim if you have been in an auto accident or need to place a claim on any other policy.



## CONTACT US

Displays the contact information for your assigned RCU Insurance Services agent as well as our general contact information.