

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.

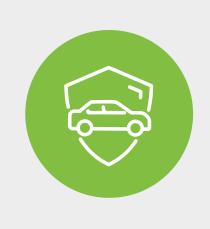
Update Holders Information:

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

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.



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