

Getting Started with InsurLink



Using InsurLink

We are happy to provide you with access to your insurance information anytime via the web. By now you should have received an invitation email with information to activate your InsurLink account.

The email looks similar to the one below:

LET'S CONNECT.

Hi Jennifer Powell,

Deeley's new InsurLink program puts all your insurance information at your fingertips.

- 24/7 access to your policies
- Available at home, at work or on the go
- Download auto ID cards, request certificates, and submit claims on your phone

Click to sign in and activate your portal:
<https://clientportal.vertafore.com/Account/Create/?inviteIdentifier=XXXXXXXXXXXXXXXXXXXXXXXXXXXX>

Be Sure to sign in within 15 days. Otherwise, your invitation will expire and you'll need to contact us for a new one.

Interested in the mobile app? After you activate your portal, download the app to your mobile device:

- Apple iOS: <https://apps.apple.com/us/app/insurlink/id1462689482>
- Android: <https://play.google.com/store/apps/details?id=com.insurlink>

Got questions? Call us!
410.213.5600

THANKS!

Your friends at Deeley Insurance Group
<http://www.deeleyinsurance.com>

Use the link in the email to open and activate your account for InsurLink. If you haven't received the email* or you didn't activate the account within 15 days of receiving the email, contact us for a new account activation email.

* If you haven't received the email in your Inbox, check your Junk email folder.

You can access InsurLink on your desktop computer, smart phone, or tablet providing you with flexibility. InsurLink contains tabs of information that include an Overview, Policies, Auto ID Cards, Claims, Documents, and Certificates.

What you see may differ depending on your permissions.

Deeley Insurance Group LLC
7171 Bent Pine Road
Willards, MD21874
www.deeleyinsurance.com

- Overview
- Policies
- Auto ID
- Claims
- Documents
- Certificates

Overview Tab

The Overview tab displays your Quick Links, announcements from your agency, recent documents, and a list of your agency contacts.

You can also access any of the functions from within the tabs in the Quick Links section. This includes functions such as adding drivers to a policy, submitting a claim, downloading an auto ID, and more.

My Quick Links

Auto <ul style="list-style-type: none">Download auto IDAdd a driverRemove a driverAdd a vehicleRemove a vehicle	Certificates <ul style="list-style-type: none">Add a holderRequest new certificate	Policies <ul style="list-style-type: none">Change a policyFile a claim
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Policies Tab

The policies tab displays all your current and future policies. Each policy includes the policy number, the type of business (such as Homeowners or Private Passenger), the policy term, and an icon for the insurance company providing the coverage, as well as a View Summary link: a link to a PDF, or a Not yet available notation.

# TRUCKERS Truckers	11/14/2019 - Continuous CURRENT	120251 1 (20793)	View Summary
# GARAGE AND DEALERS Garage & Dealers	11/14/2019 - Continuous CURRENT	120251 1 (20793)	View Summary

Click the View Summary link to see the details of the policy like the example at right:

POLICY NUMBER: PA 123002

Basic Policy Information

Named Insured		Transaction Information	
Name:	Smith, John	Term:	9/18/2014 - 9/18/2017
Address:	4000 2nd St Bethell, WA 98011	Date:	1/23/2015
Residence:	(867) 654-3210	Type:	PCH
Cell:	(123) 456-7890	Description:	delete veh, add veh
Email:	isa@gmail.com	Company:	ABC Company1

Personal Auto

Drivers

Driver Name	DOB	Licensed State	Relationship
Regular Customer	10/12/1963	WA	Insured
smith barbie			

Vehicles

Vehicle:	Limit 1	Limit 2	Deductible Type/Amount	Stated Amount
0001 0002 2010 CHEVROLET CAMARO SS/CAMARO SS 2 Door hardtop VIN: NYGARAGED				
Coverage				
Bodily injury limit(s)	100000	300000		
0002 0002 2014 Ford F150 Pickup truck VIN: 1FORDPICKUPDTRUCK2222				
Coverage				
Bodily injury limit(s)	100000	300000		

To request a change to the policy, follow these steps:

1. Click the policy in the grid.
2. When the Policy Summary page loads, scroll to the bottom of the page and click Request a Change.

Additional Coverages

No coverages are available to show. Please view your full policy document for all coverages, or contact your agent for details.

Do you want to make a change to your policy?

If you'd like to request any changes to your policy, please give us as much information as possible and we'll contact you to verify details.

[REQUEST A CHANGE](#)

3. On the Request Policy Change window, enter the change you'd like to make – whether it's to add/remove a driver or increase/decrease coverage limits. Complete the other information and when you're finished, click **Submit**.

A follow up is sent to your agency.

The change request date and status appear on the Policy Summary page. A member of our staff will process the change and let you know when it's done.

Veh #	Cost Veh #	Year/Make/Model	VIN	Comp	Coll
00001	00001	2012 12 123	43212341	\$100	
00002	00002	--	--	\$123	

-- PENDING: 0000019 Remove Vehicle request sent -- [REMOVE VEHICLE](#)

[ADD A VEHICLE](#)

Auto ID Tab

Your current auto policies are examined for vehicles insured on the policy. When a vehicle is found it appears on the Auto ID tab. On this tab you can view, download, email, and print an Auto ID card for a policy.

Being able to view online is handy if you need your Auto ID card, but don't have it with you.

You can use your smart phone or tablet to access InsurLink and produce an electronic copy of your card.



Claims Tab

On this tab you can view claims entered by our agency as well as submit a claim.

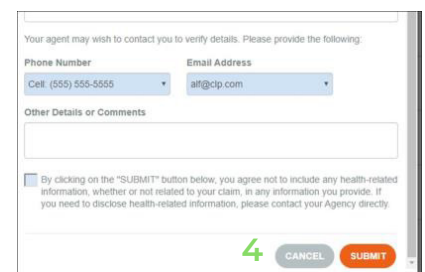
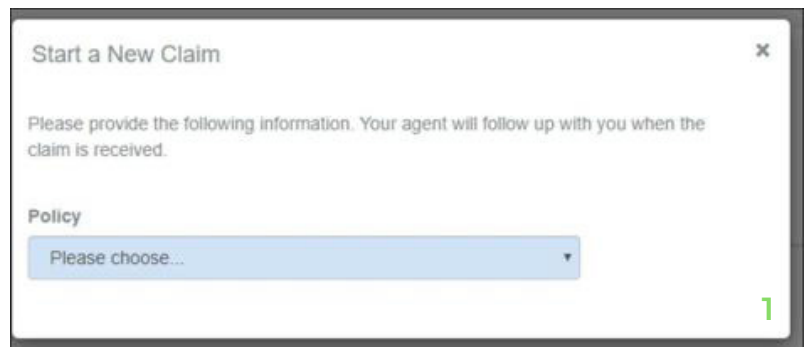
Based on your permissions, you may or may not be able to enter a new claim.



To submit a claim:

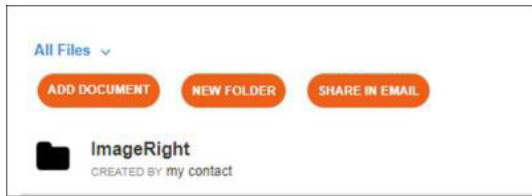
1. On the Claims tab, click **Start a New Claim**.
2. The first thing you need to do is choose the policy for which you are filing the claim.
3. Complete the fields on the Claim form. Some selections you choose from a list while others you type in the information.
4. When you have finished entering all the information, click **Submit**.
5. After submitting the claim, you will see the claim you have entered with a status of Pending and a notation of Sent to Agent.
6. When an agent reviews and enters the claim in the management system, the status will change to Open. They can then continue to change the status as they work through the claim.
7. Once the agent closes the claim, the status will change to "Closed".

*Note: If you submit more than one claim on the same policy, you will receive a notification that you've already submitted a claim for that policy. You can still choose to submit the new claim, but a warning message will appear first

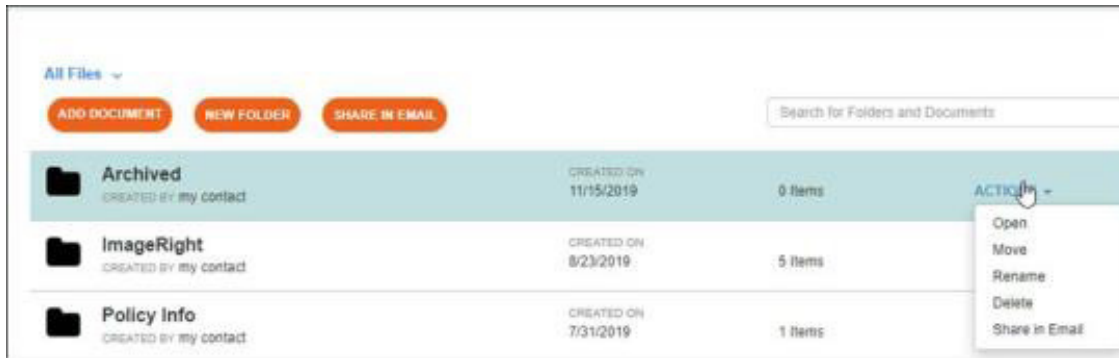


Documents Tab

On the Documents tab, you'll see documents we have shared with you as well as any you have uploaded to InsurLink. The documents are stored in a secure encrypted form.



Use the Actions drop-down to open, move, rename, delete, or Share a link to the document in an email.

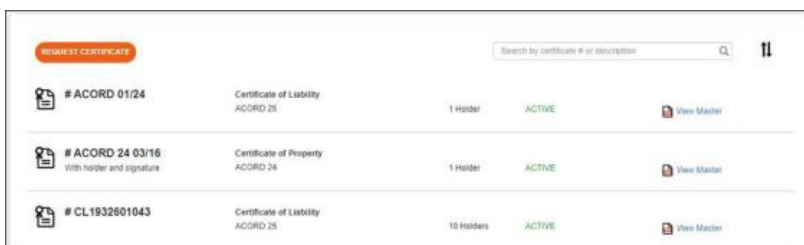


To add a document, click Add Document above the document list.

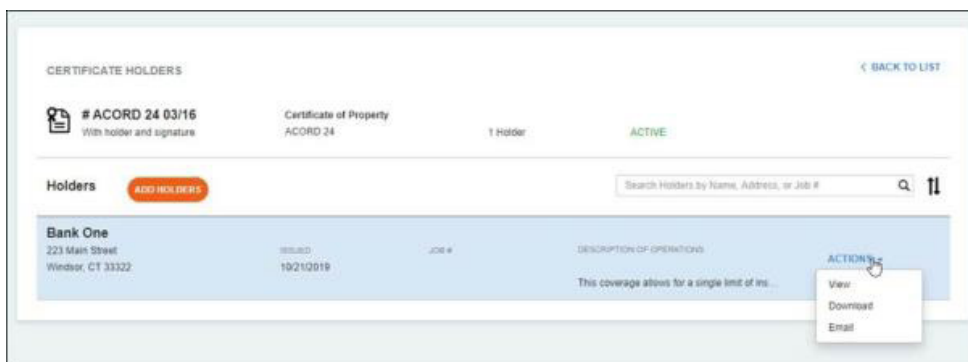


Certificates Tab

If you have commercial lines policies with us and you use certificates, you may see the certificates tab. The certificates in the list are called Master Certificates because they contain all the information that may be required by multiple certificate holders.



When you click a certificate in the grid, another web page opens showing all the current certificate holders. You can print an existing certificate, request a certificate for a new holder, or email a certificate.



If you have been given permission to add holders, you will be able to add holders directly to a Certificate by clicking **Add Holders**. You will then be prompted to fill in the necessary information (required fields are in blue – see graphic at right)

Once you add the holder, they will immediately add to the list of holders on that certificate. You can then download or view the sub-cert immediately.

Other Functions and Features of InsurLink

Header

The Header includes important menus.

Hi (username)

Here is where you can Change your Password, Manage Users, change your Email Settings, and Log Out.

The Manage Users option allows you to add users who will have access to your InsurLink. When you click **Manage Users** you will see a list of Contacts that we've entered for your account.

If you do not see the name and email you are looking for, contact Vertafore and ask us to add the contact and email address. The Email Settings selection allows you to opt out of email confirmations for requests and submissions you have made on the web site.

My Team

The information listed is the people in our agency responsible for your account. With this information so convenient, you can easily contact us if needed.

