

Client Portal: How to Generate an EOI



Learn the necessary steps to generate an Evidence of Insurance document within the REInsurePro platform. This guide provides a quick workflow to ensure your insurance documentation is updated and ready for review.

- 1 Navigate to the "My Locations" section of the dashboard and select the policy number for the location.

If you do not see the property on the initial screen, click the hyperlink in the lower left corner of the widget.

Insured Portal Dashboard - Option 2

[Using Accounts - Expand to make your payment](#)

[My Accounts - Add a Location, Review Contact Information, and Review Invoices.](#)

[My Locations - Request an Endorsement and Cancellation](#)

Active Location Policies

Policy Number	Account	Status	Street1	Street2	City	State	Postal Code
25-000-0002		Renewed			PHILADELPHIA	Pennsylvania	
25-000-0003		Renewed			PHILADELPHIA	Pennsylvania	
25-000-0004		Renewed			PHILADELPHIA	Pennsylvania	
25-000-0005		Renewed			PHILADELPHIA	Pennsylvania	
25-000-0006		Renewed			PHILADELPHIA	Pennsylvania	
25-000-0007		Renewed			PHILADELPHIA	Pennsylvania	
25-000-0008		Renewed			PHILADELPHIA	Pennsylvania	
26-000-0001		In Force			Philadelphia	Pennsylvania	
26-000-0002		In Force			PHILADELPHIA	Pennsylvania	
26-000-0003		In Force			PHILADELPHIA	Pennsylvania	

1 to 10 of 15

Inactive Location Policies

Policy Number	Account	Status	Street1	Street2	City	State	Postal Code	Cancellation Date	Effective Date	Expiry Date
---------------	---------	--------	---------	---------	------	-------	-------------	-------------------	----------------	-------------

0 to 0 of 0

Expiring Location Policies

Policy Number	Account	Status	Street1	Street2	City	State	Postal Code	Cancellation Date	Effective Date	Expiry Date
---------------	---------	--------	---------	---------	------	-------	-------------	-------------------	----------------	-------------

0 to 0 of 0

[Policy Documents](#)



Tip!

- Policy Status.
 - In Force = Currently Active
 - Cancelled = Not Active
 - Renewed = Expired
 - Issued = Future Effective Date

2

All previously downloaded Evidence of Insurance will be housed in the "Files" section.

If needing to generate a new Evidence of Insurance select "Generate EOI"

Each file will be date stamped to easily determine when it was downloaded.

The screenshot displays the PRISCATECH user interface. At the top, there's a navigation bar with the PRISCATECH logo and a 'Return to Dashboard' link. Below this, a header section shows 'Return to Dashboard', '26-000', and '-0002 -'. To the right of this header are two buttons: 'Generate EOI' (highlighted with a red box) and 'Create Endorsement'. The main content area is divided into three sections: 'EOI', 'Endorsements', and 'Account Details'. The 'EOI' section contains a message: 'You may generate an Evidence of Insurance (EOI) for this location using the 'Generate EOI' button above.' The 'Endorsements' section includes instructions on how to make changes to the policy and lists two types of endorsements: 'Endorsement' and 'Non-Premium Bearing Endorsement'. The 'Account Details' section provides information about the account, including the account number, billing account, and contact information for the Client Service Advisor (CSA). On the right side of the page, there is a 'Files' section, which is highlighted with a yellow box. This section contains a list of files, each with a download icon and a date stamp. The files listed are: 'EOI - 26-000 - 0002 - 26-27 - 20260701.pdf' and 'EOI - 26-000 - 0002 - 26-27 - 20260908.pdf'.

PRISCATECH

Return to Dashboard

Return to Dashboard
26-000 -0002 -

Generate EOI Create Endorsement

EOI

You may generate an Evidence of Insurance (EOI) for this location using the 'Generate EOI' button above.

Endorsements

To make changes to this policy, click 'Create Endorsement' in the upper-right corner of this page.

You will be asked to choose one of two change types:

- Endorsement: Use this if you need to make a change that may affect what you pay, such as updating your coverage amount or adding coverage.
- Non-Premium Bearing Endorsement: Use this if you only need to update Lender or Property Manager information. This won't affect your bill.

If the 'Create Endorsement' button is not available, please contact your Client Service Associate (CSA) or our Client Service Team at 888-741-8454 - Option 3 for more information.

Account Details

Account:
Account Number: NREG008
Billing Account:
To make a payment, click the billing account name above.

Client Service Advisor (CSA) Jonathan
Client Service Advisor (CSA) (816) 388-
Work Phone: 1@nreg.com
Client Service Advisor (CSA)
Email: 06/16/2021

Files

View All Files

EOI - 26-000 - 0002 - 26-27 - 20260701.pdf
EOI - 26-000 - 0002 - 26-27 - 20260908.pdf