Client Portal: Navigating the Portal Dashboard

Learn how to effectively navigate the REInsurePro portal to manage your insurance accounts. This guide provides a clear walkthrough of accessing billing, policy details, and claim submission features.

1 Client Portal Overview

Once you log in to the **Client Portal**, you can conveniently access and manage all aspects of your account in one place.

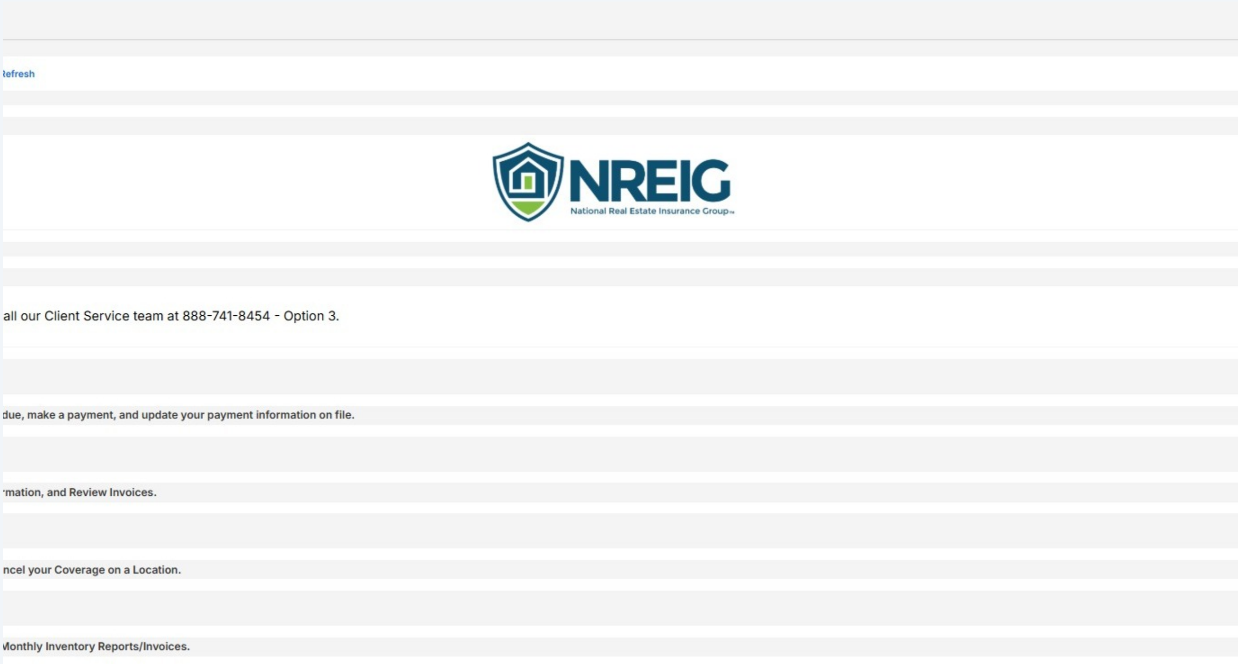
Through the portal, you can view:

- Insured location information
- Account details
- Billing accounts and payment information
- Policy documents
- Invoices
- Claims reporting information

The Client Portal also provides self-service options that allow you to:

- Make payments on your account
- Add new locations
- Request updates to existing locations
- Request location cancellations
- Access and download policy documents and invoices
- View account and policy status information

Designed for easy account management, the Client Portal gives you 24/7 access to the information and tools you need to manage your coverage efficiently.



2 Billing Accounts

Under **Billing Accounts**, you can access your billing information and make payments for your policies. If you have multiple billing accounts, all accounts associated with your profile will be displayed.

Billing Account Information

Each billing account displays:

- Account Number
- Billing Name
- Billing Description (if associated with a specific property or location)
- Outstanding Balances

Available Payment Options

Past Due Balance

Allows you to pay any outstanding balances from previous billing periods that remain unpaid.

Current Due Balance

Allows you to pay premiums that are currently due for the current billing period.

Balance Due to End of Term

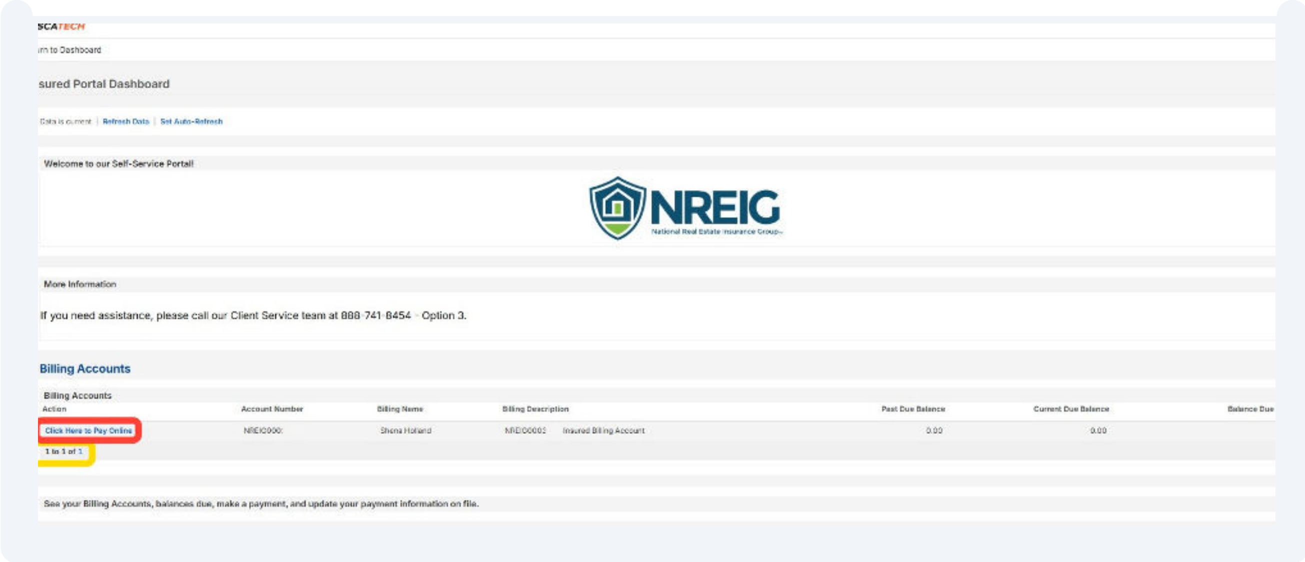
Allows you to pay the remaining balance owed for all covered locations through their individual renewal dates.

Available Actions

Within **Billing Accounts**, you can:

- View billing account details
- Review outstanding balances
- Make payments toward past due balances
- Pay current premiums
- Pay policy balances through the end of the term
- Manage billing across multiple accounts from a single location

If multiple billing accounts are associated with your profile, each account will be listed separately with its corresponding balance information and payment options.


SCATECH
rn to Dashboard
sured Portal Dashboard
Data is current | Refresh Data | Set Auto-Refresh
Welcome to our Self-Service Portal!
NREIG
National Real Estate Insurance Group
More Information
If you need assistance, please call our Client Service team at 888-741-8454 - Option 3.
Billing Accounts
Billing Accounts
Action
Account Number
Billing Name
Billing Description
Past Due Balance
Current Due Balance
Balance Due
Click Here to Pay Online
NREIG000
Shena Holland
NREIG0000
Insured Billing Account
0.00
0.00
1 to 1 of 1
See your Billing Accounts, balances due, make a payment, and update your payment information on file.

3 My Accounts

Under the **My Accounts** section, you can view detailed information for each account associated with your policies. Accounts are organized into the following categories:

In Force

Accounts with policies that are currently active.

Issued

Accounts with policies that have been issued and have a future effective date.

Cancelled

Accounts with policies that are no longer active.

Renewed

Accounts with policies that have expired and have been replaced by a renewal policy.

Account Information

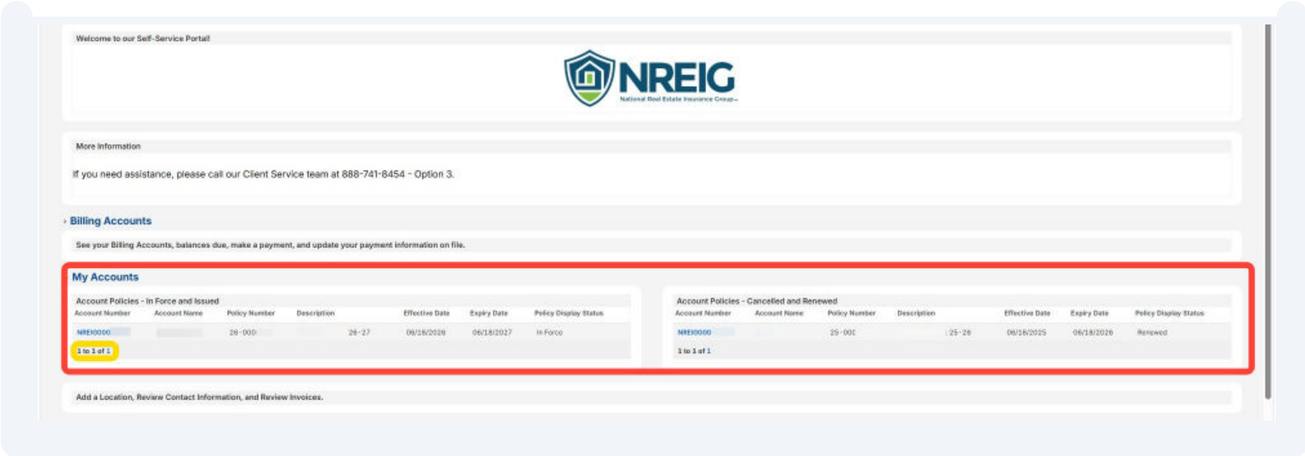
Each account displays the following details:

- Account Number
- Account Name
- Policy Number
- Description
- Effective Date and Expiration Date
  - As long as there is an active location associated with the account, the policy will automatically renew upon expiration.
- Policy Status
  - **In Force** – Currently active
  - **Cancelled** – No longer active
  - **Renewed** – Expired and renewed under a new policy term
  - **Issued** – Future effective date

Available Actions

Within the **My Accounts** section, you can:

- View account-specific details
- Review account contact information
- Request a new location proposal for an existing account



Welcome to our Self-Service Portal!
NREIG
National Real Estate Insurance Group
More Information
If you need assistance, please call our Client Service team at 888-741-8454 - Option 3.
Billing Accounts
See your Billing Accounts, balances due, make a payment, and update your payment information on file.
My Accounts
Account Policies - In Force and Issued
Account Number Account Name Policy Number Description Effective Date Expiry Date Policy Display Status
NREI0000 26-000 26-27 06/18/2026 06/18/2027 In Force
1 to 1 of 1
Account Policies - Cancelled and Renewed
Account Number Account Name Policy Number Description Effective Date Expiry Date Policy Display Status
NREI0000 25-000 25-26 06/18/2025 06/18/2026 Renewed
1 to 1 of 1
Add a Location, Review Contact Information, and Review Invoices.

4 My Locations

Under **My Locations**, you can view all of your location policies, including **Active Locations**, **Location Policies Pending Cancellation**, and **Inactive Location Policies**.

Active Location Policies

Displays all locations with policies that are currently active or scheduled to become effective in the future.

Location Policies Pending Cancellation

Displays all locations that have been issued a **Notice of Intent to Cancel**. These locations remain insured until the listed cancellation date.

Inactive Location Policies

Displays all locations whose policies have been canceled and are no longer covered.

Location Information

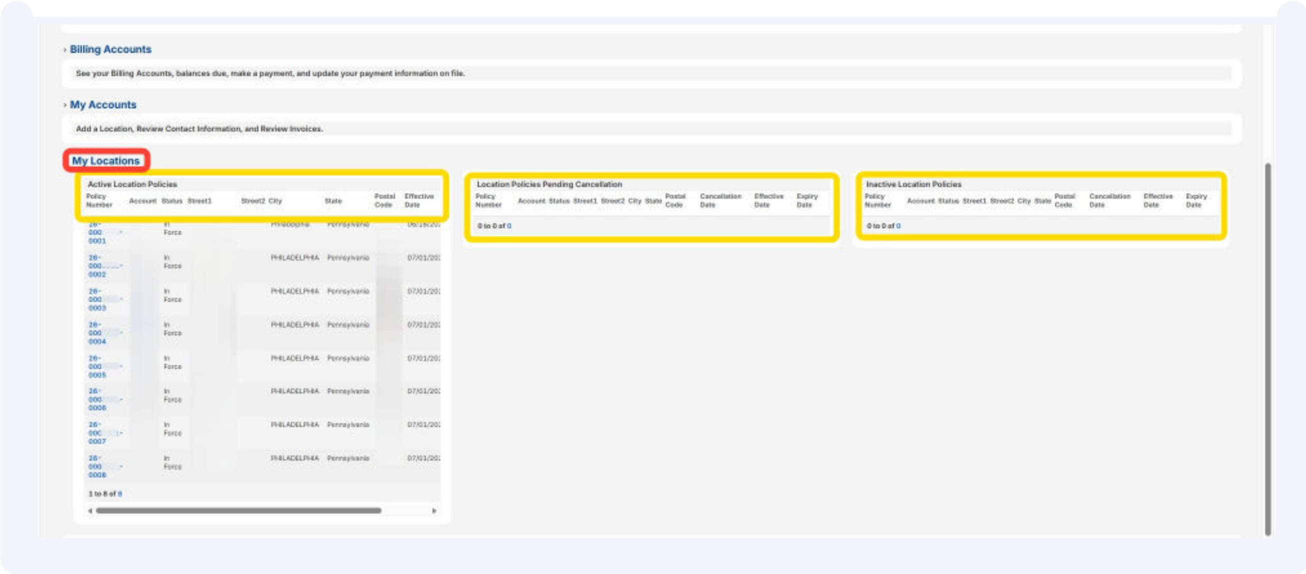
Each location record includes:

- Policy Number
- Insured Account
- Current Status
- Location Address
- Current Policy Term

Available Actions

Within **My Locations**, you can:

- View location-specific details
- Generate location documents
- Request policy changes
- Request policy cancellations



Billing Accounts
See your Billing Accounts, balances due, make a payment, and update your payment information on file.
My Accounts
Add a Location, Review Contact Information, and Review Invoices.
My Locations
Active Location Policies
Policy Number Account Status Street1 Street2 City State Postal Code Effective Date
1 to 8 of 8
Location Policies Pending Cancellation
Policy Number Account Status Street1 Street2 City State Postal Code Cancellation Date Effective Date Expiry Date
0 to 0 of 0
Inactive Location Policies
Policy Number Account Status Street1 Street2 City State Postal Code Cancellation Date Effective Date Expiry Date
0 to 0 of 0

5 Policy Documents

The **Policy Documents** section provides access to all policy-related documents that have been previously generated for each location.

For each document, you can:

- Open the document as a PDF
- Download the document directly to your device

This allows you to easily access policy forms, endorsements, notices, certificates, and other location-specific documentation whenever needed.

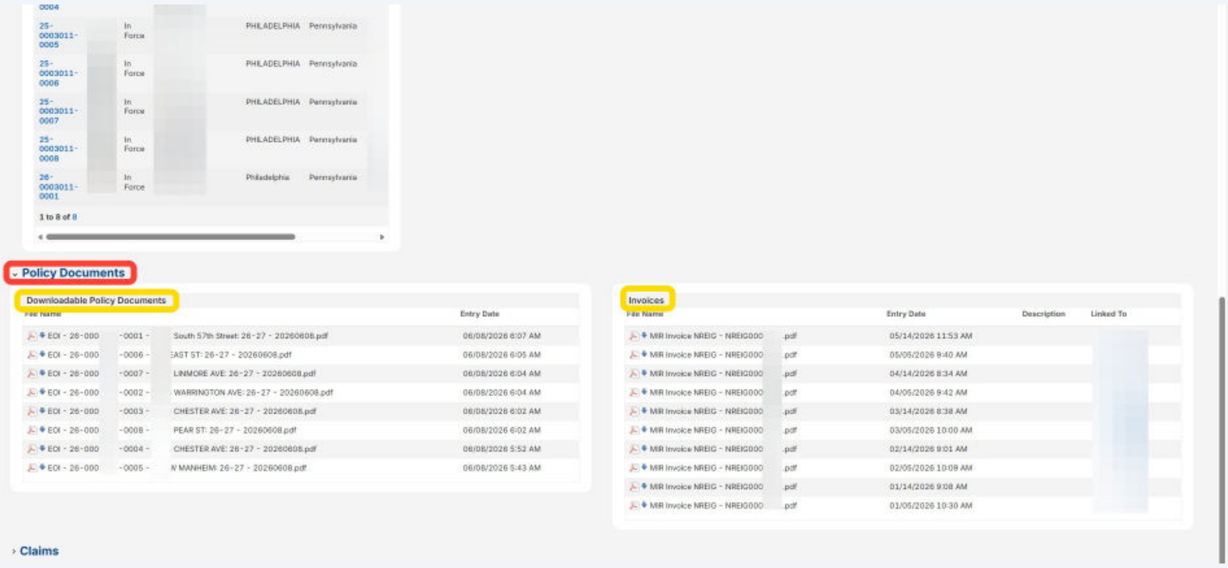
Invoices

The **Invoices** section contains all **Monthly Inventory Report (MIR) invoices** generated for your account.

For each invoice, you can:

- Open the invoice as a PDF
- Download the invoice directly to your device

This section provides a convenient way to review, save, and maintain records of all invoices associated with your account.



6 Click the icon to file a new claim.