MyRPS Retail Get Started Guide

Helping you come through for your clients.





MYRPS RETAILER NAVIGATION OVERVIEW

MyRPS provides access to information regarding your organization as well as your insured's policy data, including:

- E&O and Licensing • Expiring Policies
- Recent Submissions, Documents, and Invoices
- Reports
- Policy Documents

• Monthly Statements

The following information is available within this Basic Navigation Job Aid:

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Submit Claim
Users
Reports
GET A QUOTE
VIEW MY
Policies
Quotes
Open Invoices
Statements
PAY ONLINE
RATING PLATFORMS



Lets Get Started : Access MyRPS

The portal is located at **my.rpsins.com**

Please note functionality will vary based on user permissions. Administrators can edit a user's access level by referring to the "Users" section (pg. 12)

HOME

This is your **dashboard**, where you can utilize the tabs or boxes below to navigate the site.

RISK PLACEMENT SERVICES		Hi, Marketing User <u>Sign Out</u>
HOME MY ACCOUNT 🗸 GET A QUOTE VIE	W MY 🗸 RATING PLATFORMS 🗸	
Welcome to RPS!	My Account	Get a Quote
Get started managing your business and agency with RPS. Pay Online	 Manage your agency information including your users, contacts, and licensing. Access your reports. 	insurance products for your customers.
Contact Us	GET STARTED >	SEARCH PRODUCTS >
	View your policies and related documents, check the status of your quotes and renewals, access open invoices, or download your statements.	From here you can: • Create new or access existing quotes. • Access your bound policies (if supported by platform). • Access commission statements (if supported by platform).
	OPEN INVOICES > STATEMENTS >	SELECT A PLATFORM

MY ACCOUNT

Provides two sub-categories to choose from:

НОМЕ	MY ACCOUNT 🗸	GET A QUOTE	VIEW MY 🗸	RATING PLATFORMS \checkmark
	Agency Profile			
	Reports			

Note that within these two categories is a secondary navigation aid (we will cover these later).

Agency Profile

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		Home My Organizatio	n v Policies	Statements	Reports	Us
eneral / E&O Info	K Placement Ser Vledge. Relationships. Trust and Co Contacts Documents / Images	rvices, Inc	Logged in a	s marketing@fak T	e.rpsins.com ïest Broker (A	Sign 00010
Fest Broker General Information		E&O Information				
Producer ID:	A0001017	Carrier:	Admiral Insura	nce Company		
Legal Name:	Test Broker	Policy ID:	ABC-123			
DBA Name:	N/A	Expiration Date:	1/1/2024 Upda	te E&O		
Entity Type:	Corporation	Limits:	\$1.000.000			
Tax Classification:	C-Corp					
Status:	Active	Accounting Informatio	n			
Physical Address:	8700 E Northsight Blvd #100	(Defaults to Mailing Address if not spec	ified)			
	Scottsdale, AZ 85260-3671					
Mailing Address:	8700 E Northsight Blvd #100	Email:	N/A			
	Scottsdale, AZ 85260-3671	Address:	8700 E Northsi	ght Bvd #100		
Tax ID:	12-3456789 Update W-9		Scottsdale, AZ	85260-3671		
Phone:	(480) 860-5560	Phone:	N/A			
Fax:	(480) 860-5592	Fax:	(480) 860-5592	2		
Email:	hsierer@hciusa.com					
Parent Office:	N/A	Fin	d user by login			
Application Date:	4/16/2002	Docume	nt Delivery Set	tings		
Application Date.						

© 2023 Risk Placement Services, Inc. All rights reserved. Phone: (866) 582-2547 | Fax: (480)281-5627 | Email: CustomerCare@rpsins.com

MY ORGANIZATION

Home	My Organization •	Po	licies	Statemen	ts	Reports	Users
	General / E&O Info						
	Update My Info	•					
	Licenses						
	Contacts						
	Documents / Images	5					
	Submit Claim						

General/E&O Info

Click **General/E&O** Info to view and update E&O and W-9 information. An **Update Required** message will appear for any information that needs updating.

	k Placement Ser Vledge. Relationships. Trust and Co	vices, Inc	Logged in as marketing@fake.rpsins.com Sign-0 Test Broker (A000101
General / E&O Info	Contacts Documents / Images		
Test Broker			
General Information		E&O Information	
Producer ID:	A0001017	Carrier:	Admiral Insurance Company
Legal Name:	Test Broker	Policy ID:	ABC-123
DBA Name:	N/A	Expiration Date:	1/1/2024 Update E&O
Entity Type:	Corporation	Limits:	\$1,000,000
Tax Classification:	C-Corp		
Status:	Active	Accounting Informatio	n
Physical Address:	8700 E Northsight Blvd #100	(Defaults to Mailing Address if not spec	cified)
	Scottsdale, AZ 85260-3671		N//A
Mailing Address:	8700 E Northsight Blvd #100	Email:	N/A
	Scottsdale, AZ 85260-3671	Address:	8700 E Northsight BVd #100
Tax ID:	12-3456789 Updated W9 Required	Disease	Scottsdale, AZ 85260-3671
Phone:	(480) 860-5560	Phone:	N/A
Fax:	(480) 860-5592	Fax:	(480) 860-3392
Email:	hsierer@hciusa.com		
Parent Office:	N/A	Fin	d user by login
Application Date:	4/16/2002		
Memberships:	x CONTACT CUSTOMER CARE x		

UPDATE MY INFO

To update E&O, license, or W-9 information, click **New Change Request**. Note: **Open Change Requests** and **Closed Change Requests** should not be used.

	Home	My Organization -	Po	licies	Statements	Reports
		General / E&O Info				
vi	ces,	Update My Info	•	Ne	w Change Requ	iest ^r
onfic	lence.	Licenses		Ope	n Change Requ	lests
		Contacts		Close	ed Change Req	uests
		Documents / Images	S			
		Submit Claim				

New Change Request

Complete the fields on the **New Change Request** and click **Save Changes.** Fill the fields on the subsequent pages with the required information. These individual pages are pictured below.

my Risk Knowled	Placement Serv ge. Relationships. Trust and Conf	r ices, Inc idence.	Logged in as marketing@fake.rpsins.com Sign-Off Test Broker (A0001017)
Adding a Change	Request	✓ Pick One	
Producer Id:	A0001017	Deactivate	
Action	Pick One		
Request Type: Comments:	Pick One	 ✓ Pick One Agency License E&O Individual Agent Licen W-9 Form 	nse
	Save Changes Cancel		

E&0



Individual Agent License

my Risk Knowled	Placement Services, Inc ge. Relationships. Trust and Confidence.
Adding a Change	Request
Producer Id:	A0001017
Action	Add / Update 🗘
Request Type:	Individual Agent License 🗘
Contact Details	
License Contact	Existing Contact New Contact
Existing Contact	Pick One
License Details	
State:	Pick One \$
Resident / Non-Resident:	Pick One
License Number:	
Effective Date:	mm/dd/yyyy format
Expiration Date:	mm/dd/yyyy format
	This is a perpetual license.
Image or PDF of License:	Choose File no file selected
Comments:	
	Save Changes Cancel

0

Placement Services, Inc ge. Relationships. Trust and Confidence.
Request
A0001017
Add / Update 💠
W-9 Form \$
Test Broker This field and the top line (Name) of your W-9 form should match.
Corp (C) 🗘
 FEIN SSN If you change your FEIN/SSN from what is already listed, please indicate both when and why it changed in the comments field below. Note that further documentation may be required.
Choose File no file selected Download a blank W9 form from the I.R.S.

Save Changes Cancel

Open Change Requests

Open Change Requests should not be used within MyRPS.

Closed Change Requests

Closed Change Requests should not be used within MyRPS.

Licenses

View agency licenses for retailer. The license where the retailer resides is listed at the top, marked with a star.

Outdated issues for the primary license are highlighted in red. Only the primary license will be flagged for outdated information. Any out-of-state licenses will not be flagged as outdated.

R	25	Risk I Knowledge	Placement Sei e. Relationships. Trust and Co	Logg	ed in as marketin	g@fake.rpsins.o Test Broke	com Sigi er (A0001	
General / E8	O Info	Licenses	ontacts Documents / Images					
Licens	ses							
O Add a	New Li State	cense License #	License Type	Licensed Individual	Date Effective	Date Expires	Date Added	Notes
Update	AZ	★ 1235487	Agency License	Test Broker	1/1/2011	12/31/2099	1/13/2022	
Update	AL	12345	Agency License		9/6/2023	12/31/2099	9/12/2022	
Update	СТ	12345	Agency License		9/6/2023	12/31/2099	9/12/2022	
Update	DE	12345	Agency License		9/6/2023	12/31/2099	9/12/2022	
Update	FL	12345	Non Resident Agency License	Test Broker	9/7/2022	12/31/2023	9/7/2022	
Update	GA	12345 TEST	Non Resident Agency License	Test Broker	n/a	12/31/2023	9/1/2022	

Contacts

View, edit, or add contacts for an organization on the **Contacts** tab.

my R	Risk Place Knowledge. Relation	Logged in as marketing@fake.rpsins.com Sign-Off Test Broker (A0001017)		
General / I	E&O Info Licenses Contacts	Documents / Images		
Cont	acts			
Add	a New Contact			
	Name	Address	Mailing Address	Contact Info
00	_Policies			Email: policydelivery@retailer.com Phone: n/a Fax: n/a
0	Barney Rubbles (Policies to BArney)	8700 E Northsight Blvd #100 Scottsdale, AZ 85260- 3671	8700 E Northsight Blvd #100 Scottsdale, AZ 85260- 3671	Email: barney_rubbles1234@broker.com Phone: (480) 860-5560 Fax: (480) 860-5592
00	Bob Jones AGENT/PRODUCER	8700 E Northsight Blvd #100 Scottsdale, AZ 85260- 3671	8700 E Northsight Blvd #100 Scottsdale, AZ 85260- 3671	Email: Phone: (480) 860-5560 Fax: (480) 860-5592

Documents/Images

View documents for an organization on the **Documents/Images** tab. There is an option to filter by document type if multiple documents are listed.

	isk Placem owledge. Relationship	ent Service s. Trust and Confidence	es, Inc	Logged in as marketing@fake.rpsins.com Sign-Ofi Test Broker (A0001017)
General / E&O Info Licens Documents / Im Filter by Type	es Contacts Docu ages	iments / Images		
Туре	Date Created	Date Modified	Description	View
W-9 Form	10/31/2023 9:49:03 PM	10/31/2023 9:49:05 PM	W-9 Form	View
E&O Policy	10/31/2023 9:47:17 PM	10/31/2023 9:47:20 PM	E&O exp 12/31/2040	View
Non-Resident License	4/27/2022 2:19:47 PM	4/27/2022 2:19:48 PM	MS exp 05/31/2024	View
Non-Resident License	4/27/2022 2:19:32 PM	4/27/2022 2:19:33 PM	UT exp 05/01/2027	View
Agent License	1/13/2022 3:27:33 PM	1/13/2022 3:27:34 PM	AZ exp 12/31/2099	View
Agency License	1/13/2022 3:22:57 PM	1/13/2022 3:22:59 PM	AZ exp 12/31/2099	View

Submit Claim

Retailers can view any current claims on the **Submit Claim** field by searching **Policy#** or **Named Insured.** To complete the search with the selected parameters, click **Search.** Click **Reset** to clear entries.

Please note: You always have the option to access the claims process via <u>RPSins.com</u>. Once on the page, select Quote & Pay, File a Claim, and then select the "Online: Complete the First Notice of Loss" link. File a Claim is also available at the bottom of the <u>RPSins.com</u> website pages:

^{my} ; P S	Risk Placement Services, Inc RPS Claims	Logged in as marketing@fake.rpsins.com Sign-Off
First Notice of Loss		
Claim Search	New FNOL Entry	
Policy#:		
Date Of Loss:	m	
Named Insured:		
	Search Reset	

Create a New Claim

Complete the additional required information on subsequent pages, clicking **Previous** or **Next** to navigate between pages. Add any attachments to the final page and click **Submit**.

Please contact: rps_claims@RPSins.com or (844) 777 8323 for further instructions and questions regarding online claims.

tice Of Loss						
* Date/Time of Loss:			Find Policy	Step 1: S	elect Date/Time of L	oss and then click Find Policy
* Policy Number:				Step 2: C	omplete all required	fields as noted with an *.
* Insured/Policy Holder:						
* Effective Date:	mm/dd/yyyy		* Expiration	on Date:	mm/dd/yyyy	
* Reported By:		Ŧ				
Date Reported:	11/6/2023					
Is this a CAT claim?	No 🔻					
* Type of Loss:		v				
Insured Contact Name:			Insured Phone	Alterna	te phone	
Insured Email Address:						
Mortgage/Lien Holder:						
Agency Name:						
nsured Mailing Address:						
City:			State:		• Zip:	

USERS

Add, edit, or deactivate MyRPS users and their permissions. Note: If you are not able to add, edit, or deactivate users, you do not have the appropriate access level to complete the actions. Please reach out to CustomerCare@rpsins.com.



Entity Users

Here is a list of users within your organization. Use the links below to add, edit or deactivate users.

Add a New User

	Name ↓ 2	Email 🗢	
00	Test User	testuser@gmail.com	Send Welcome Email
0	Test Account	testaccount@gm.com	Send Welcome Email
00	Sample Account	sampleaccount@gm.com	Send Welcome Email

Add a New User

Add a new user to access the portal through Add a New User. The organization's administrator must complete fields to create the new user. Once all fields are complete, click **Save User**.

Entity Users

Here is a list of users within your organization. Use the links below to add, edit or deactivate users.

Add a New User

	lge. Relationships. Trus	t and Confidence.			
dding a User					
	Please note, all users mu	st first be added as a co	ntact. Please select a	contact from the drop of	down below.
Contact	Pick One	Click h	ere to add a contact		
Email (Username)					
First Name		Please validate the first	and last name are er	tered correctly	
Last Name					
Roles	Access Level	Administrator	Accountant	Manager	User
	Read Only Access	\checkmark	\checkmark	\checkmark	~
	View Reports	\checkmark	~	✓	
	View Statements	\checkmark	√*		
	Add or Remove Users	\checkmark			
	*An accountant role grants a user th contact email address.	ne ability to view all statements, in	cluding those of associated "c	hild" agencies, when their email	address matches the accountir
Include First Rate Access					
Document Delivery Options	 Do not notify me of new Notify me of new policy Notify me of new policy 	w policy documents. / documents via email. / documents and deliver	them via email.		
	Save User Cancel				

Note: An accountant role grants a user the ability to view all statements, including those of associated "child" agencies, when their email address matches the accounting contact email address.

Reports

The following reports are available to you to export to PDF or Excel.



GET A QUOTE

On this page, you have the option to search for the insurance coverage you're seeking by category or product name(s).



Get a Quote and Product Search on RPS

Search for your insurance coverage on RPS. We have consolidated the insurance products here to help you find the right insurance coverage for your needs. Once selected, you will be taken to the quote platform to get started.

Categories Type product names to quickly find w	vhat you're looking for Q
Popular Non Profit D&O USLI This policy helps cover the defense costs, settlements and judgments arising out of lawsuits and wrongful act allegations brought against a nonprofit organization. More specifically for the non-profit?s board members so they may not be held personally responsible for the organization's actions.	Popular Real Estate E&O USLI This product is specifically designed D&O for board members of real estate companies. This could include investors, tenants, building owners, creditors, local or state officials, state and federal regulators, and a variety of others.
Visit USLI ^{I2®} →	Visit USLI 🖉 🔶

VIEW MY...

Contains four sub-categories to choose from:

HOME MY ACCOUNT 🗸 GET A QUOTE	VIEW MY 🗸	RATING PLATFORMS 🗸
	Policies	
	Quotes	
	Open Invoices	
	Statements	

Policies

View all policies* placed with RPS. You also have the option to filter by stage, i.e., Active, Inactive, Binding, by date, and by premium amounts. Select the "Details" button beside each policy to view further information.

RPS Retailer Policies								Quotes	Policies
Search	۹	Filter by Stage Select	9	Filter by Date 1 of 3 filters active 		Filter by P	remium - Max		
Narrowed to 371 policies Expiration: After 11/16/2021 X Reset filters								🔄 Export t	to Excel
≎Insured name	\$	Bound	\diamond Policy ID	≎ Status	≎ Underwriter	≎ Effective	Expiration	≎ Premium	
XYZ Company	0	5/19/2023	HRF123456	Policy In Force	Tim Foody	05/25/2023	08/31/2024	\$38,137	Details
ABC Company	0	5/18/2023	LKL123456	Policy In Force	Tim Foody	05/25/2023	08/31/2024	\$54,775	Details
RST Company	03	3/06/2023	JHG123456	Binder Issued	Adam Connor	02/28/2023	07/01/2024	\$10,626	Details
LMN Company	0	6/01/2023	UYT123456	Binder Issued	Evan Miller	06/08/2023	06/08/2024	\$18,250	Details
EFG Company	0	5/31/2023	PTR123456	Binder Issued	Tim Foody	05/31/2023	05/31/2024	\$12,085	Details

*Please note: This tab does not include policies processed online (efinity, RPS Standard Express, RPS E&S Personal Lines Express, etc.).

Policy Details

Additional information can be obtained by expanding the tabs below.

SUBMISSION DETAIL Back XYZ Company Policy Active Total Annual Premium Submission Number 5447028 \$38,137 Policy Number Submission Period LHZ849109 05/25/2023 - 08/31/2024 Product Type Status Excess - Errors & Omissions Policy In Force Coverage **Balance** Due BRK Excess - Errors & Omissions \$34,006.77 Company Finance Company Landmark American Insurance Company not provided Billing Agency **INSURED INFO** Named Insured Address 9510 N Meridian Street Suite 200 XYZ Company Indianapolis, IN 46260 Phone Mailing Address not provided 9510 N Meridian Street Suite 200 Email Indianapolis, IN 46260 not provided Expand all | Collapse all LIMITS AND DEDUCTIBLES 2 ~ 3 ~ ACCOUNTING SUMMARY POLICY DOCUMENTS 1 ~

Have coverage questions? Ask your RPS contact

Tim Foody Account Executive 무 Chicago, IL 60607

△ Risk Placement Services, Inc. - Executive Lines S 312-803-6290
☑ Tim_Foody@rpsins.com

Quotes

RPS Retailer					Quotes Policies
Search	Filter by S	Stage	Filter by Date	Filter by Premium	
	Q Select		- I of 3 filters active	♥ Min - Max	
Narrowed to 0 quotes					A Export to Excel
Expiration: After 11/06/2021 X	<u>et filters</u>				
◇Insured name ◇Rece	eived 🗘 Quote ID	≎ Status	≎ Underwriter	♦ Effective ♦ Expiration	≎ Premium
Onen Inveises					
Open invoices					
Accounting					
Open Invoices					
Search	-	Filter by Date		Filter by Balance	
	C	1 of 2 filters active		Min - Max	
Narrowed to 0 open invoices					
Effective: After 11/06/2021 X Rese	t filters				\$ Pay online
⇔ Policy Number	¢Invoice ID	≎ Insured	≎ Effective Date	≎Due Date	≎Balance Due

Statements

Within the Statements tab you have the option to search by name, filter type, i.e., Agency Bill, Direct Bill, Past Due, or Archived, and by time period. You also have the ability from here to "pay online".

Agency Bill tab is an Accounting statement recap of invoices generated at month end. Statements are due by the 15th of the following month, or as indicated on each line item for items with alternative payment terms.

Direct Bill is a monthly recap showing the retailer's commission owed to them (or back to RPS if displayed as a credit) for Direct Bill Insured and Direct Bill Company policies.

Past Due items listed in the Past Due Notices tab are sent twice monthly, advising of all open balances due to RPS for Agency Bill accounts. Currently, this is RPS Binding only.

Archived

Please note: If a user is assigned the "Accountant" role within the agency, their permissions grant the ability to view all statements, including those of associated "child" agencies, when their email address matches the accounting contact email address.

RIS	K PLACEMENT RVICES			Hi, Accounting Test Sign Out
н		👻 🛛 GET A QUOTE 🔤 VIEW M	Y	
Sta	ABC Insurance	e - Austin		
Sear	rch	Filter by Type Q Select	Filter by Office • ABC Insurance - Austin	Filter by Period ▼ 6/2022
Narr	owed to 14 statements riod: 6/2022 - 1/2024 ×	ffice: ABC Insurance - Austin 💌 Reset filters	To see other offices, "X" out of the default location. The system will reset with all locations.	🔄 Download selected \$ Pay online
	▼ Period	≎ Office	≎Туре	
	09/2023	ABC Insurance - Austin	Agency Bill	Download
	05/2023	ABC Insurance - Austin	Agency Bill	Download
	04/2023	ABC Insurance - Austin	Agency Bill	Download
Narr Pe	rowed to 32 statements riod: 6/2022 - 1/2024 X Re	set filters		Download selected Pay online
	▼ Period	≎ Office	in 🖤 in the second	≎Туре
	09/2023	ABC Insurance - Austin		Agency Bill Download
0	05/2023	ABC Insurance - Austin		Agency Bill Download
	04/2023	ABC Insurance - Bryan-College Station		Direct Bill Download

PAY ONLINE

rpsins.epaypolicy.com

No login required.

	Please enter	3Ke a Payme your payment infor	ent mation below		
PAYER	Marketing User				
EMAIL ADDRESS	marketing@fake.rps	iins.com			
AGENT	A0035954				
ZIP CODE	35209				
INVOICES	No invoices wer	e found.			
TOTAL	\$0.00				
OF SELECTED					
INVOICES					
		-			
	Î			0	
	ACH	e la	Cr	edit Card	
	Amount	\$0.00	Amount	\$0.00	
	Fee Ac	dd Invoices	Fee	Add Invoices	
	Total	\$0.00	Total	\$0.00	
)]		0	
PAYMENT					
INFORMATION					
	Save my bank ac	count for future use			
ATTACHMENTS	O ADD FILES				
NOTES					
				1,	
	By clicking "Send", I a	uthorize Demo Agency	to debit my account		
		7			
	I'm not a rahat				
		reCAPTC Privacy - Terms			

Pro Tip: When performing a search, if invoices do not populate, please provide ONLY your agent ID number (starts with "A") and ZIP code.

RATING PLATFORMS

Quote, bind, and issue instantly (not available to all associations or group affiliations).





RPSins.com

2850 Golf Road Rolling Meadows, IL 600078 Phone: (866) 595 8413 | Fax: (480) 281 5627

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