

MyRPS *Retailer Basic Navigation Job Aid*



Background

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

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

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

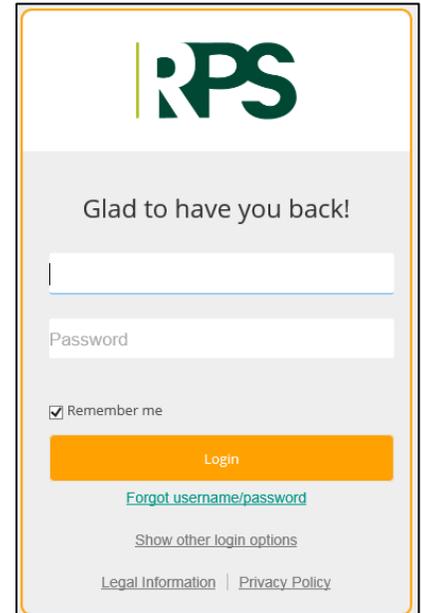
| | |
|---|----|
| Access MyRPS | 2 |
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Access MyRPS

To access the MyRPS Portal go to my.rpsins.com/Portal/account/login

Login using the **email** and **password** created for you by your portal administrator or RPS Customer Care.



My Account



Upon clicking the **My Account** tab, you will have several tabs to navigate. These tabs are described below.

Statements



There are several options to download these accounting details within the various tabs.

If you are the accounting contact for multiple locations, [click here](#) for further instructions.

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Agency Bill Statements

The **Agency Bill Statements** 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.

| | | | | | |
|---------------------------------|---------------|---------------|-----------------------------------|------------------|-------------------|
| Agency Bill Statements | Open Invoices | Paid Invoices | Direct Bill Commission Statements | Past Due Notices | Broker Statements |
| Statement Period | | | Download | | |
| Agency Bill Statement - 02/2021 | | | View / Download | | |

Open Invoices

Open Invoices is a recap of invoices with an open balance (debit or credit). This tab is for RPS Binding only.

| Agency Bill Statements | Open Invoices | Paid Invoices | Direct Bill Commission Statements | Past Due Notices | Broker Statements |
|------------------------|---------------|---------------|-----------------------------------|------------------|----------------------|
| Policy ID | Insured | Invoice ID | Effective Date | Due Date | Balance Due |
| | | | | | |
| | | | | | Total: \$0.00 |

Paid Invoices

The **Paid Invoices** tab is not currently supported by RPS.

| Agency Bill Statements | Open Invoices | Paid Invoices | Direct Bill Commission Statements | Past Due Notices | Broker Statements |
|------------------------|---------------|----------------|-----------------------------------|------------------|-------------------|
| Payment Date | Amount Paid | Invoice Number | | | |
| | | | No items to display | | |

Direct Bill Commission Statements

Direct Bill Commission Statements 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.

| | | | | | |
|------------------------|---------------|---------------|-----------------------------------|------------------|-------------------|
| Agency Bill Statements | Open Invoices | Paid Invoices | Direct Bill Commission Statements | Past Due Notices | Broker Statements |
| Statement Period | | | Download | | |

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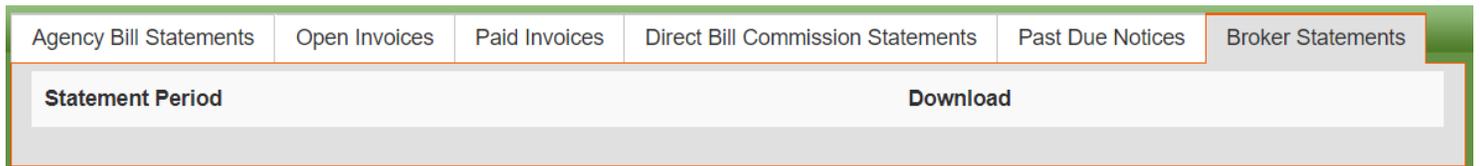
Past Due Notices

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

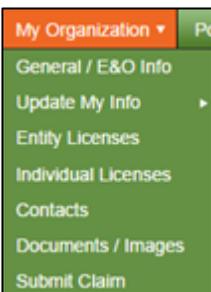


Broker Statements

The **Broker Statements** tab is an Accounting statement recap of invoices sent to a retailer, advising specific due dates per account in which payment is due to RPS. This tab is for RPS Brokerage Division only.



My Organization



View or update agency information with **My Organization**.

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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.

View Users and modify **Document Delivery Settings** on the **General / E&O Info** tab.

Test Broker

General Information

Producer ID: A0001017
 Legal Name: Test Broker
 Entity Type: C Corporation
 Status: Active
 Physical Address: 8700 E Northsight Blvd #100
 Scottsdale, AZ 85260-3671
 Mailing Address: 8700 E Northsight Blvd #100
 Scottsdale, AZ 85260-3671
! Tax ID: 12-3456789 Updated W9 Required
 Update W-9
 Phone: (480) 860-5560
 Fax: (480) 860-5592
 Email: hsierer@hcius.com
 Parent Office: n/a
 Application Date: 4/16/2002
 Memberships: n/a

E&O Information

Carrier: Admiral Insurance Company
 Policy ID: ABC-123
 Expiration Date: 1/1/2022 **Update E&O**
 Limits: 1,000,000

Accounting Information
(Defaults to Mailing Address if not specified)

Email: n/a
 Address: 8700 E Northsight Blvd #100
 Scottsdale, AZ 85260-3671
 Phone: n/a
 Fax: (480) 860-5592

View Users
Document Delivery Settings

View Users

Add, edit or delete MyRPS users and their permissions on the **View Users** screen. Note: if you are not able to add, edit or delete users, you do not have the appropriate access level to complete the actions.

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](#)

| Email | Name | |
|----------------------------|----------------|---|
| mndshelton@gmail.com | Dianne Shelton | Change Password Send Welcome Email |
| testbroker@kevinphifer.com | Kevin Phifer | Change Password Send Welcome Email |

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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**.

Adding a User

Please note, all users must first be added as a contact. Please select a contact from the drop down below.

Contact ▼ [Click here to add a contact](#)

Email (Username)

First Name Please validate the first and last name are entered correctly

Last Name

Roles

| Access Level | <input type="checkbox"/> Administrator | <input type="checkbox"/> Accountant | <input type="checkbox"/> Manager | <input type="checkbox"/> User |
|---------------------|--|-------------------------------------|----------------------------------|-------------------------------|
| Read Only Access | ✓ | ✓ | ✓ | ✓ |
| View Reports | ✓ | ✓ | ✓ | |
| View Statements | ✓ | ✓* | | |
| Add or Remove Users | ✓ | | | |

*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.

Include First Rate Access

Document Delivery Options

- Do not notify me of new policy documents.
- Notify me of new policy documents via email.
- Notify me of new policy documents and deliver them via email.

[Cancel](#)

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

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Document Delivery Settings

Enter email addresses for either policy document delivery or document notification with a link to the PDF policy document. This setting is not available to all organizations.

Document Delivery Settings

Document Delivery Addresses

This area sends a PDF document along with a link to the document in MyRPS.

One address per line

Document Notification Addresses

This area only sends a notification email with a link to the document in MyRPS.

One address per line

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.



New Change Request

Adding a Change Request

Producer Id:

Action: ▾

Request Type: ▾

Comments:

Pick One

Add / Update

Deactivate

Pick One

Agency License

E&O

Individual Agent License

W-9 Form

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.

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Agency License

Adding a Change Request

Producer Id:
 Action:
 Request Type:

License Details

State:
 Resident / Non-Resident:
 License Number:
 Effective Date: mm/dd/yyyy format
 Expiration Date: mm/dd/yyyy format
 This is a perpetual license.

Image or PDF of License:

Comments:

E&O

Adding a Change Request

Producer Id:
 Action:
 Request Type:

E&O Details

Document Type:
 Policy Number:
 Carrier Name:
 Limit: per claim
 Claims Made Or Occurrence?:

Prior Acts
 This E&O policy has full prior acts coverage
 Effective Date: mm/dd/yyyy
 Expiration Date: mm/dd/yyyy
 Deductible or SIR: \$

Image of Cert or Declarations
 Page:

Comments:

Individual Agent License

Adding a Change Request

Producer Id:
 Action:
 Request Type:

Contact Details

License Contact: Existing Contact
 New Contact
 Existing Contact:

License Details

State:
 Resident / Non-Resident:
 License Number:
 Effective Date: mm/dd/yyyy format
 Expiration Date: mm/dd/yyyy format
 This is a perpetual license.

Image or PDF of License:

Comments:

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W-9 Form

Adding a Change Request

Producer Id:
 Action:
 Request Type:

W9 Details

Legal Entity Name (as registered with the IRS):
This field and the top line (Name) of your W-9 form should match.

What Type of Entity are you?

FEIN / SSN: 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.

Attach W9 Form:
[Download a blank W9 form from the I.R.S.](#)

Comments:

Open Change Request

Open Change Request should not be used within MyRPS.

Closed Change Request

Closed Change Request 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.

| State | License # | License Type | Licensed Individual | Date Effective | Date Expires | Date Added | Notes |
|-------|-----------|----------------|--------------------------|----------------|--------------|------------|-------|
| AZ | ★ 12345 | Agency License | | 1/10/2012 | 1/10/2022 | 11/30/2008 | |
| MS | 15032132 | Agency License | Test Broker | n/a | 5/31/2019 | 9/30/2017 | |
| MS | 15031574 | Agency License | Test Broker | n/a | 5/31/2019 | 6/15/2017 | |
| WA | 12345 | Agency License | Test Broker For Training | n/a | n/a | 11/30/2008 | |
| UT | 12345 | Agency | Test Broker For Training | n/a | n/a | 11/30/2008 | |
| AZ | 1235487 | Agent License | Test Prod User | 1/1/2011 | 12/31/2099 | 11/18/2020 | |

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Contacts

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

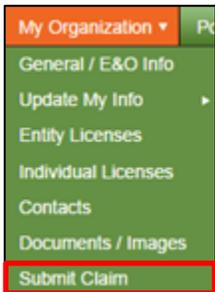
| General / E&O Info Licenses Contacts Documents / Images | | | | |
|--|------------------------------------|---|---|---|
| Contacts | | | | |
| + Add a New Contact | | | | |
| | Name | Address | Mailing Address | Contact Info |
| | _Policies | | | Email: policydelivery@retailer.com Phone: Fax: |
| | Barney Rubble (Policies to BArney) | 8700 E Northsight Blvd #100 Scottsdale, AZ 85260-3671 | 8700 E Northsight Blvd #100 Scottsdale, AZ 85260-3671 | Email: barney_rubble@broker.com Phone: (480) 860-5560 Fax: (480) 860-5592 |
| | 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 Tab

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

| General / E&O Info Licenses Contacts Documents / Images | | | | |
|--|-----------------------|-----------------------|-------------|----------------------|
| Documents / Images | | | | |
| -- Filter by Type -- | | | | |
| Type | Date Created | Date Modified | Description | View |
| Broker Agreement | 5/20/2020 12:07:04 PM | 5/20/2020 12:07:04 PM | | 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 selected parameters, click **Search**. Click **Reset** to clear entries.

First Notice of Loss

[New FNOL Entry](#)

Claim Search

Policy#:

Date Of Loss:

Named Insured:

[Search](#) [Reset](#)

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Create a New Claim


Process

Step 1: To create a new claim, click on **New FNOL Entry**. Select **Date/Time of Loss** and then click **Find Policy**.

First Notice Of Loss

* **Date/Time of Loss:**   Find Policy

Step 2: Add Policy Number or Insured Name, then click **Submit**.

Policy Search

Policy Number: ×

OR

Insured Name:

Mailing Address:

City: **State:** **Zip:**

Submit
Clear
Cancel

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Step 3: Policy information will prefill; complete additional required information and click **Next**.

First Notice Of Loss

* Date/Time of Loss:

* Policy Number:

* Insured/Policy Holder:

* Effective Date: * Expiration Date:

* Reported By:

Name: Phone:

Send confirmation email?

Date Reported:

Is this a CAT claim?

* Type of Loss:

Insured Contact Name:

Insured Email Address:

Mortgage/Lien Holder:

Agency Name:

Insured Mailing Address:

City: State: Zip:

Step 4: Complete the additional required information on subsequent pages, clicking **Previous** or **Next** to navigate between pages. Add any attachments on the final page and click **Submit**.

Note: [Contact the Claims Department](#) for further instructions and questions on online claims.

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Policies

[Home](#) |
 [My Organization ▾](#) |
 [Policies](#) |
 [Statements](#) |
 [Reports](#) |
 [Users](#)

View all policies* placed with RPS with filter options. To use the filter option, enter the desired filter information and tab out of the field to see the filtered information. Click the magnifying glass beside each specific policy to view the **Policy Detail Information**.

Policies for Test Broker (A0001017)

| | Named Insured | Effective | Policy ID | Status | Underwriter |
|----------|-------------------------|---|----------------------|------------------|----------------------|
| Filters: | <input type="text"/> | from 2/20/2020 to <input type="text"/> | <input type="text"/> | Any | <input type="text"/> |
| | Test Insured 02192021-2 | Feb 28, 2021 | NN1229326 | Policy In Force | Steve Nebel |
| | Test Insured 02192021-1 | Feb 28, 2021 | NN1229297 | Policy In Force | Steve Nebel |
| | Testing NewProd | Feb 12, 2021 | NN1223328 | Policy In Force | Steve Nebel |
| | RPSTechTest | Oct 13, 2020 | FLAT CANCEL | Binder cancelled | Steve Nebel |
| | RPSTechTest | Oct 12, 2020 | FLAT CANCEL | Binder cancelled | Steve Nebel |
| | RPSTechTest | Oct 12, 2020 | FLAT CANCEL | Binder cancelled | Steve Nebel |

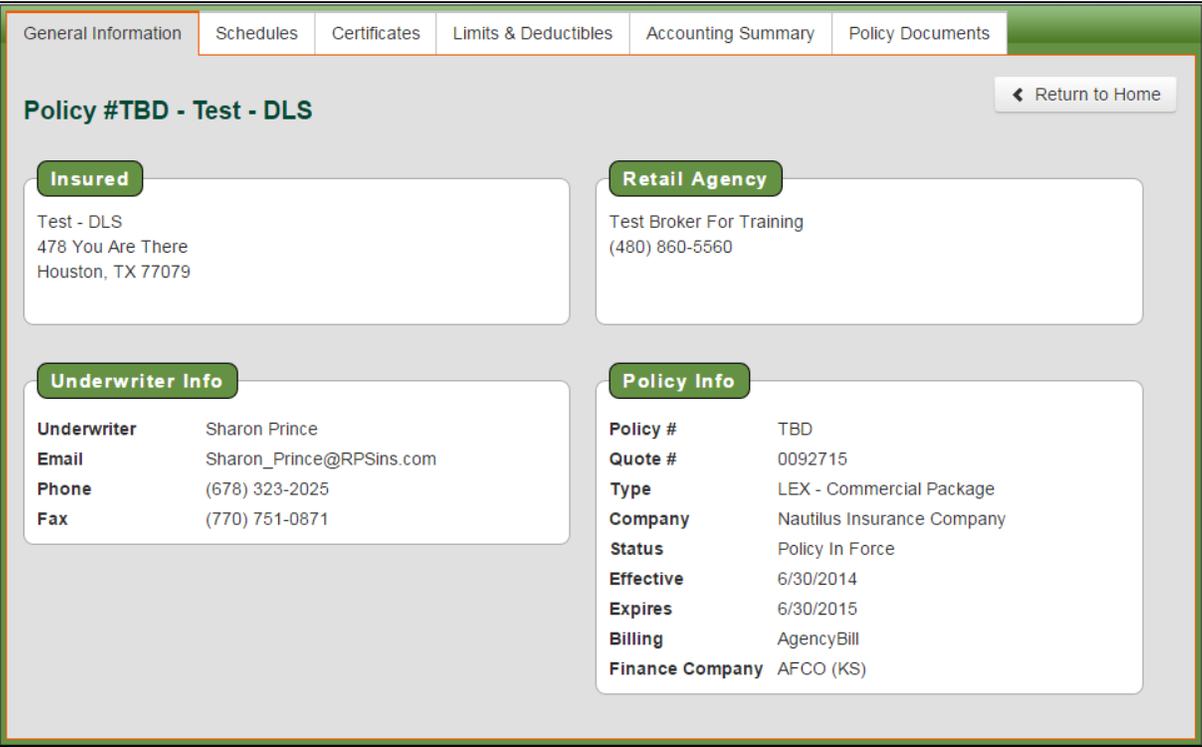
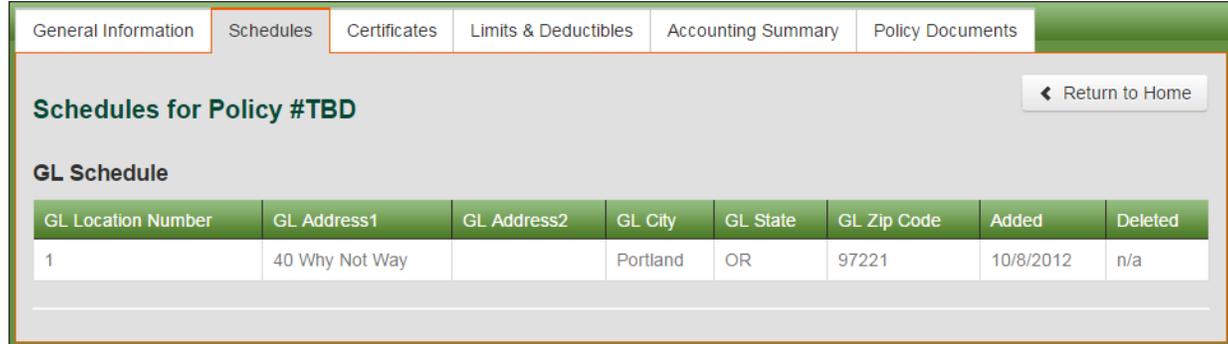
1 - 6 of 6 items
 Home Page Export to Excel

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

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Policy Detail Information Screen

Each tab on the **Policy Detail Information** screen displays a variety of information. Certain tabs only appear if there is information for the tab. For example, if a schedule is added to the policy, the **Schedules** tab will appear.

| Tab Name | Available Information | | | | | | | | | | | | | | | | |
|----------------------------|---|--------------------|-------------|-------------|-------------|-----------|-------------|-------|---------|---|----------------|--|----------|----|-------|-----------|-----|
| General Information | <p>General information regarding the policy.</p>  | | | | | | | | | | | | | | | | |
| Schedules | <p>Only available if a schedule is added to the policy.</p>  <table border="1" data-bbox="332 1759 1507 1843"> <thead> <tr> <th>GL Location Number</th> <th>GL Address1</th> <th>GL Address2</th> <th>GL City</th> <th>GL State</th> <th>GL Zip Code</th> <th>Added</th> <th>Deleted</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>40 Why Not Way</td> <td></td> <td>Portland</td> <td>OR</td> <td>97221</td> <td>10/8/2012</td> <td>n/a</td> </tr> </tbody> </table> | GL Location Number | GL Address1 | GL Address2 | GL City | GL State | GL Zip Code | Added | Deleted | 1 | 40 Why Not Way | | Portland | OR | 97221 | 10/8/2012 | n/a |
| GL Location Number | GL Address1 | GL Address2 | GL City | GL State | GL Zip Code | Added | Deleted | | | | | | | | | | |
| 1 | 40 Why Not Way | | Portland | OR | 97221 | 10/8/2012 | n/a | | | | | | | | | | |

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Certificates

View any certificates listed on the policy. Also **Request a New Certificate, Add a New Certificate, Add a Certificate Holder** or **View** the certificate on this tab.

General Information | Schedules | **Certificates** | Limits & Deductibles | Accounting Summary | Policy Documents

Certificates for Policy #TBD + Request a New Certificate < Return to Home

25 LIABILITY Certificates + Add a 25 LIABILITY Certificate Holder

| | Cert Holder Name | Name |
|----------------------|-------------------|--------------|
| View | Test - DLS | 25 LIABILITY |
| View | AFC | 25 LIABILITY |
| View | Accion Texas. LLC | 25 LIABILITY |

24 PROPERTY Certificates + Add a 24 PROPERTY Certificate Holder

| | Cert Holder Name | Name |
|----------------------|------------------|-------------|
| View | Test - DLS | 24 PROPERTY |

Limits & Deductibles

View policy limits and deductibles.

General Information | **Limits & Deductibles** | Accounting Summary | Policy Documents

Limits & Deductibles for Policy #TBD < Return to Report

Limits

| Coverage | Amount |
|----------------------------|--------|
| Building | \$ |
| Business Personal Property | \$ |
| Business Income | \$ |

Deductibles

| Applies To | Amount |
|------------|--------|
| Each Loss | \$ |

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Accounting Summary

Provides detailed policy accounting information.

General Information | Schedules | Certificates | Limits & Deductibles | **Accounting Summary** | Policy Documents

Return to Report

Accounting Summary for Policy #NN375471

Summary

| | |
|----------------------|------------|
| Gross Policy Premium | \$841.00 |
| Commission | \$84.10 |
| Net Premium | \$756.90 |
| Total Net Billed | \$1,108.06 |
| Total Gross Billed | \$1,023.96 |
| Balance Due | \$939.86 |

Premiums

| | |
|------------------------|------------|
| Total Premium | \$841.00 |
| Taxes & Fees | \$182.96 |
| Total Charges | \$1,023.96 |
| Minimum Earned Premium | 25% |

Taxes and Fees

| Description | Amount |
|-------------------|----------|
| Policy Fee | \$125.00 |
| Surplus Lines Tax | \$57.96 |

Policy Accounting Detail

| Date | Type | Description | Gross | Charge | Credit |
|------------|------|-------------|----------|----------|--------|
| 10/13/2013 | IN | | \$182.96 | \$939.86 | \$0.00 |

Policy Documents

View documents associated with the policy. There is also an option to download and print these documents. If available, click **Download Selected** to download multiple documents.

General Information | Schedules | Limits & Deductibles | Accounting Summary | **Policy Documents**

Return to Report

Policy Documents for Policy #TBD

| Quote Id | Doc Type | File Name | Policy Id | Document Date | Last Modified | Page Count | Source | <input type="checkbox"/> |
|----------|----------|------------|-----------|---------------|---------------|------------|---------|-------------------------------------|
| 0092715 | END | Test - DLS | TBD | May 2, 2014 | May 2, 2014 | 1 | Binding | <input checked="" type="checkbox"/> |
| 0092715 | POL | Test - DLS | TBD | Apr 15, 2014 | Sep 11, 2014 | 50 | Binding | <input checked="" type="checkbox"/> |
| 0092715 | END | Test - DLS | TBD | Jul 29, 2014 | Jul 29, 2014 | 1 | Binding | <input checked="" type="checkbox"/> |

1 - 3 of 3 items

Download Selected

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Reports



Run the following report types with the option to download and export to PDF or Excel:

- Policy In-Force**
- Pending Cancellation**
- Cancelled**
- Expiration List**
- Payment History**
- Agency Production**

Accounting Contact for Multiple Locations



Information

If you are the accounting contact for multiple locations, you are able to view statements for all locations to which you are assigned. You are determined the accounting contact for a specific location in two locations: 1) on the initial onboarding application (my.rpsins.com), and 2) on the **Add New User** screen (*as shown on page 6 of this manual*).

If the accounting contact needs to be updated, send a message to CustomerCare@rpsins.com.



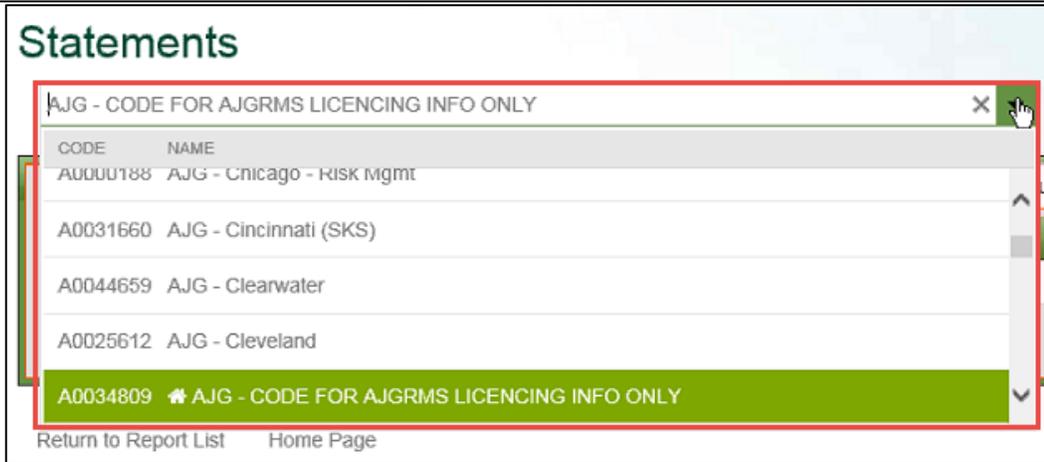
Process: View Statements from Multiple Locations

Step 1: Click **Statements** on the top banner.



Step 2: If you are the accounting contact for multiple locations, you can view the statements of the individual locations to which you are assigned through the drop-down. This drop-down also allows you to enter a specific Producer ID number to search a single location.

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Once a location is selected, there are a variety of invoices and statements available to view:



Open Invoices and **Paid Invoices** are not available when viewing all statements from multiple locations (*shown below*).

Step 3:

Click **View All Statements** to view a particular month's statements for all your assigned locations and proceed to **Step 4**.



Note: Only offices with statements available for the selected month will be displayed.

Step 4:

Clicking **View All Statements** (from Step 3) navigates to an **All Offices** screen that displays four separate tabs:

1. Agency Bill Statements

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2. **Direct Bill Commission Statements**
3. **Past Due Notices**
4. **Broker Statements**

To view all **Agency Bill Statements** for all assigned locations, ensure the **Agency Bill Statements** tab is selected and click **Download All**.

All Offices: Jun 2021 Statements

| Agency Bill Statements | Direct Bill Commission Statements | Past Due Notices | Broker Statements | |
|---|-----------------------------------|------------------|-------------------|---------------------|
| Office | | | | Download All |
| AJG - Atlanta | | | | View / Download |
| AJG - Birmingham | | | | View / Download |
| AJG - CODE FOR AJGRMS LICENCING INFO ONLY | | | | View / Download |

To receive statements from all assigned locations on the other statement types (Direct Bill Commission, Past Due or Broker), select the appropriate tab and click **Download All**.