MyRPS *Retailer Basic Navigation Job Aid*

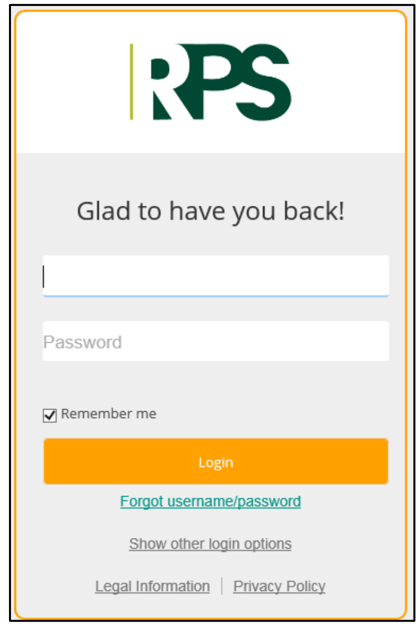
Background

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



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

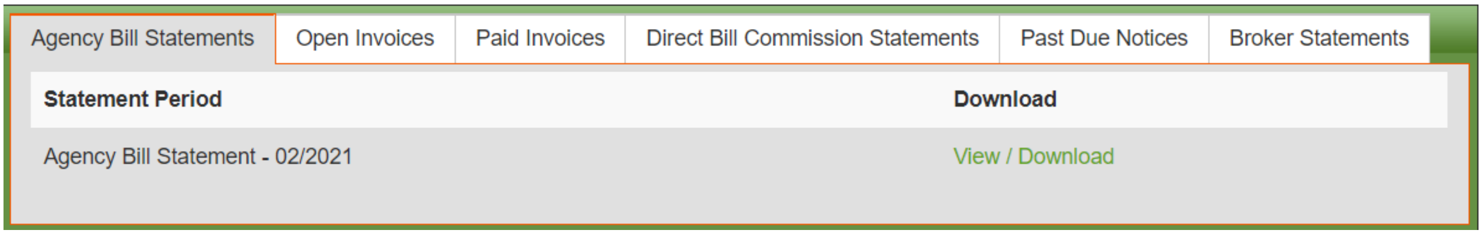
There are several options to download these accounting details within the various tabs.

If you are the accounting contact for multiple locations, click here for further instructions.

MyRPS *Retailer Basic Navigation Job Aid*

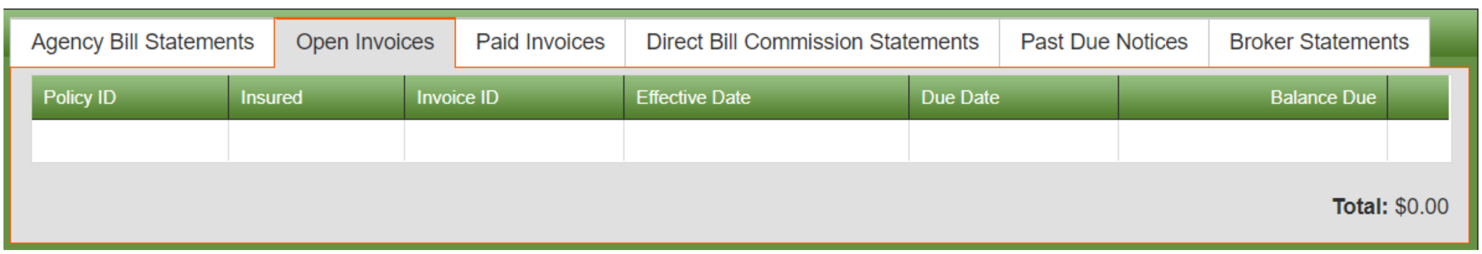
Agency Bill Statements

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.



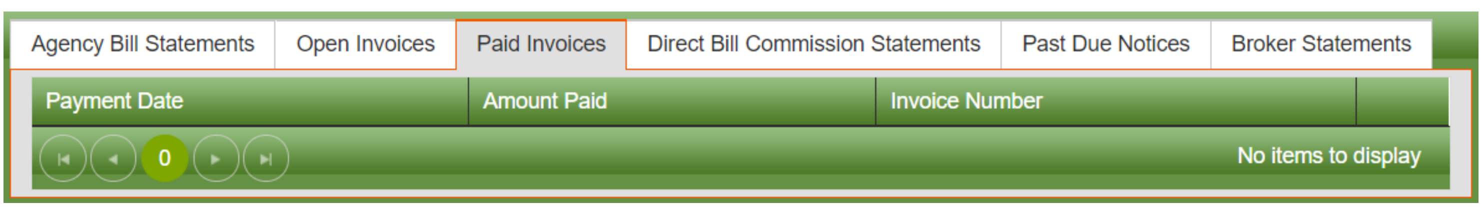
Open Invoices

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



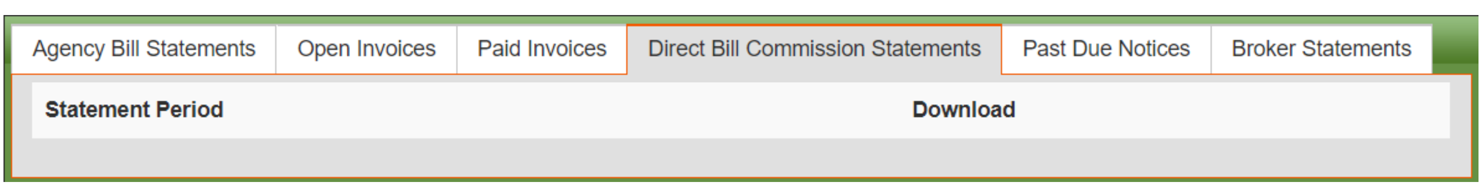
Paid Invoices

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



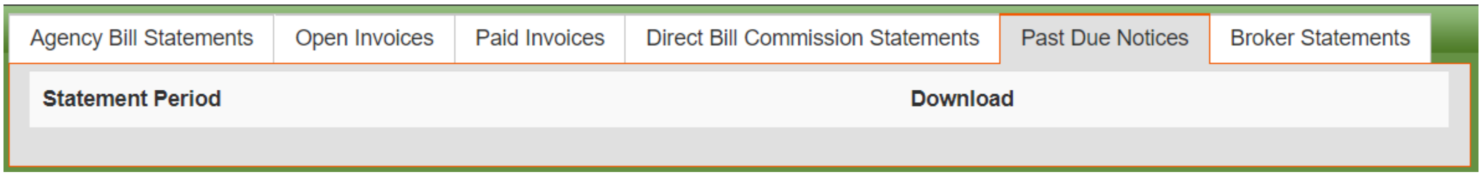
Direct Bill Commission Statements

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.



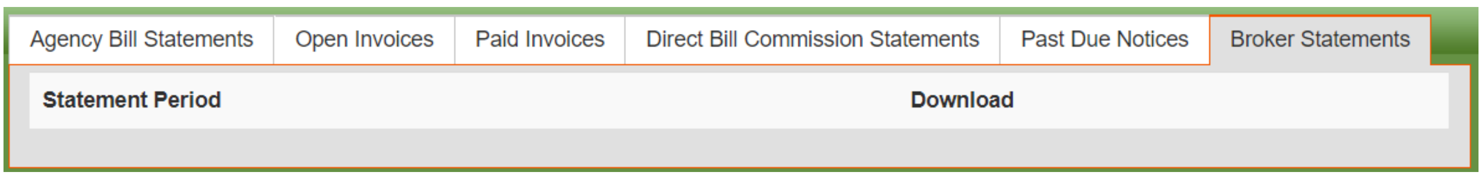
Past Due Notices

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.

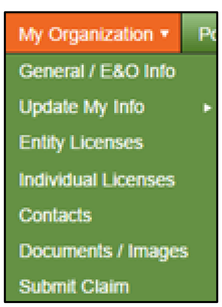


Broker Statements

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

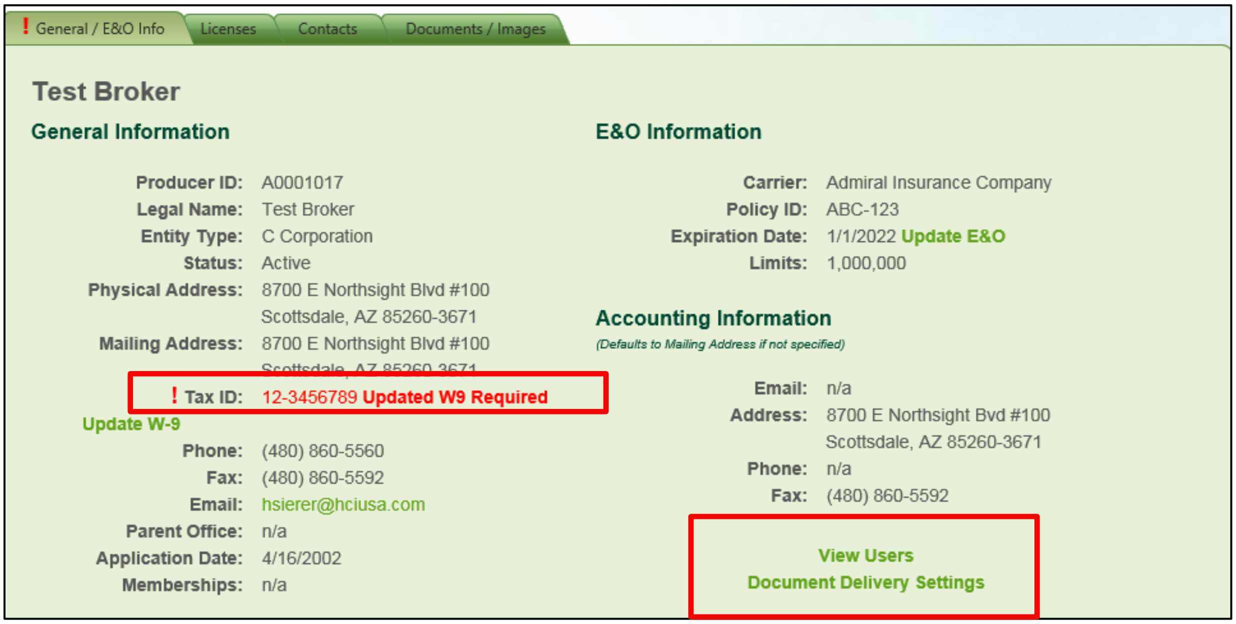


View or update agency information with **My Organization**.

General / E&O Info

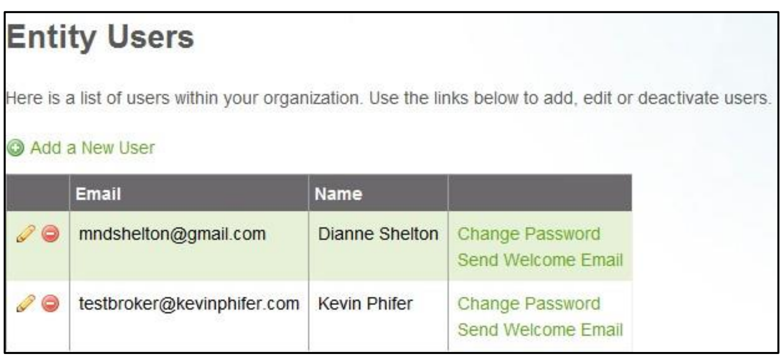
Click **General / E&O Info** to view and update E&O and W-9 Information. An **Update Required** message will appear for any information that needs updating.

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



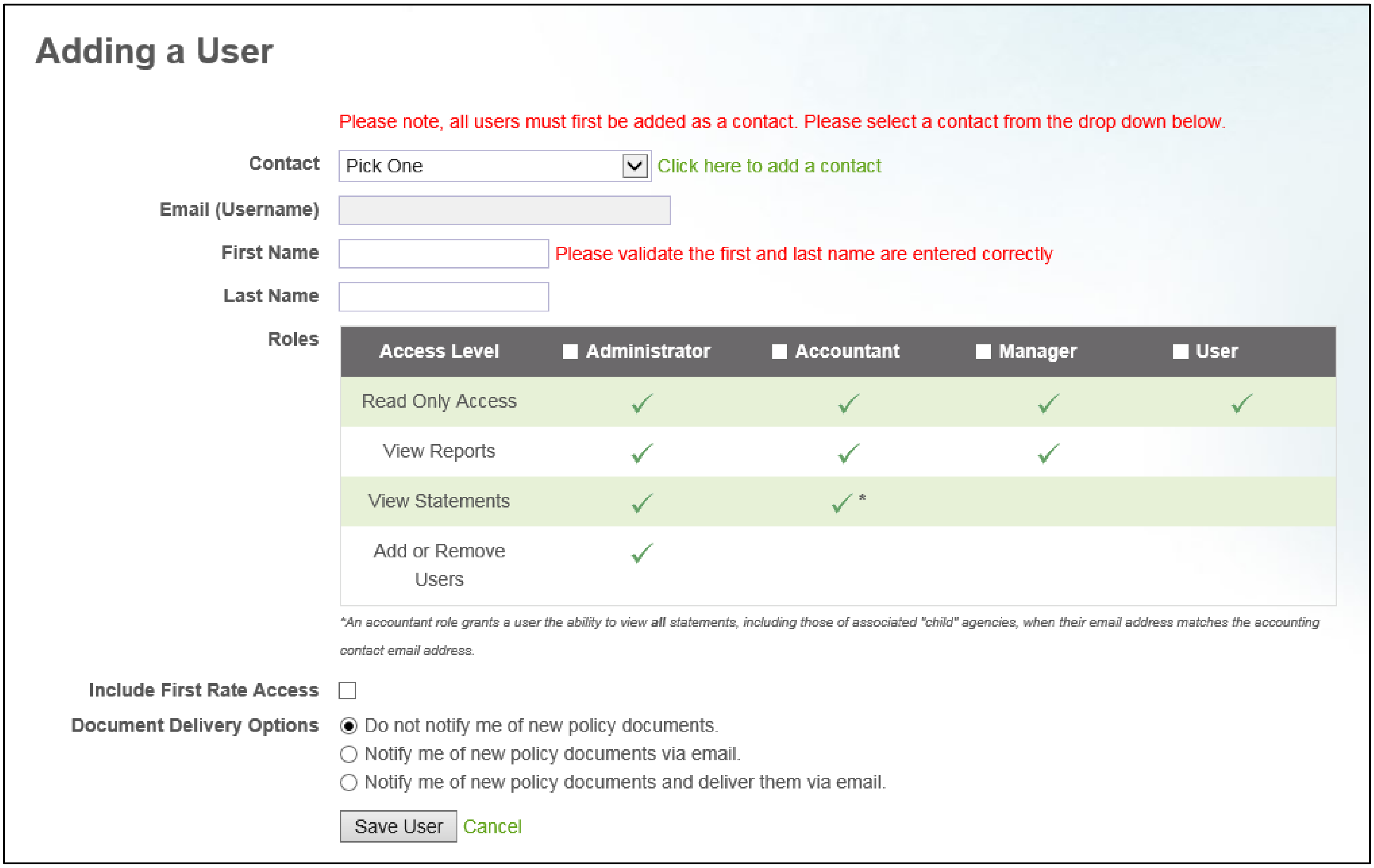
View Users

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.



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 Pick One — 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	Administrator	Accountant	Manager	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

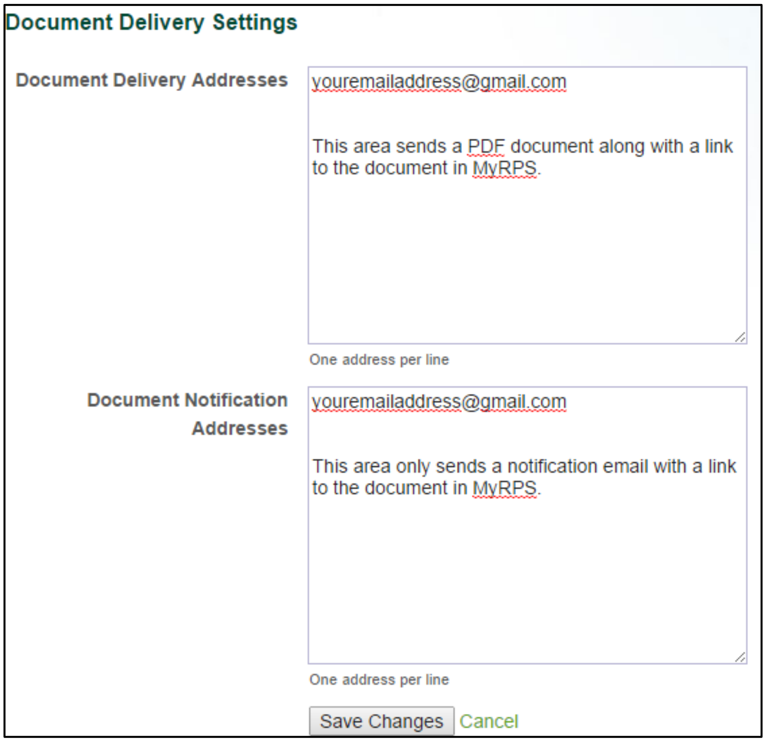
Document Delivery Options
- Do not notify me of new policy documents.
- Notify me of new policy documents via email.
- Notify me of new policy documents and deliver them via email.

Save User 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.

Document Delivery Settings

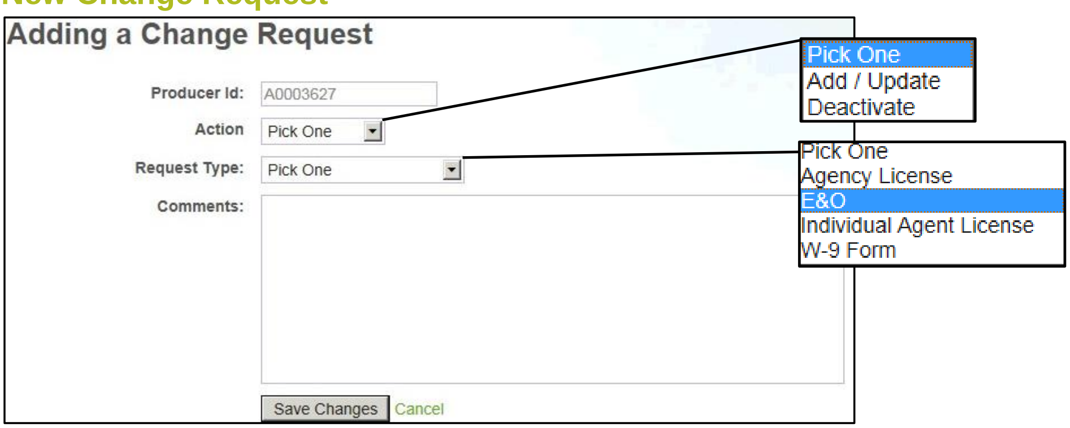
Enter email addresses for either policy document delivery or document notification with a link to the PDF policy document. This setting is not available to all organizations.



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.

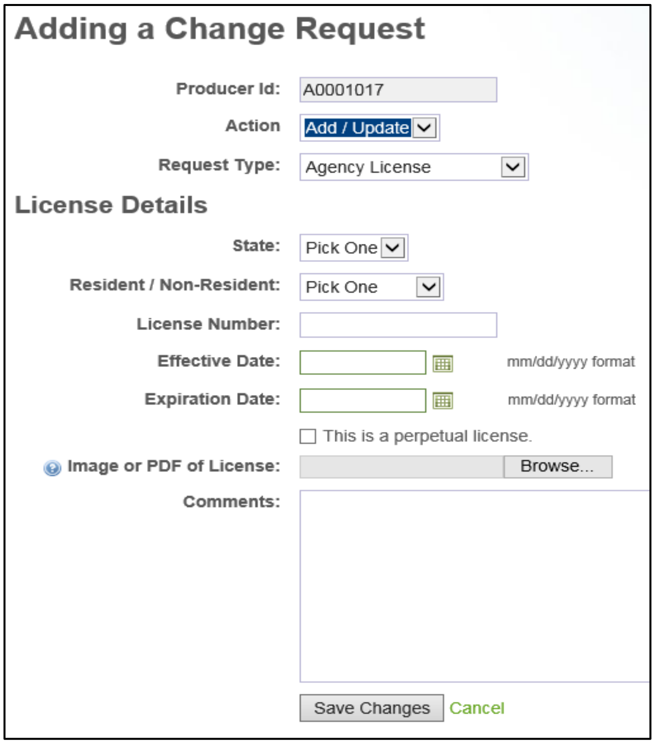
New Change Request



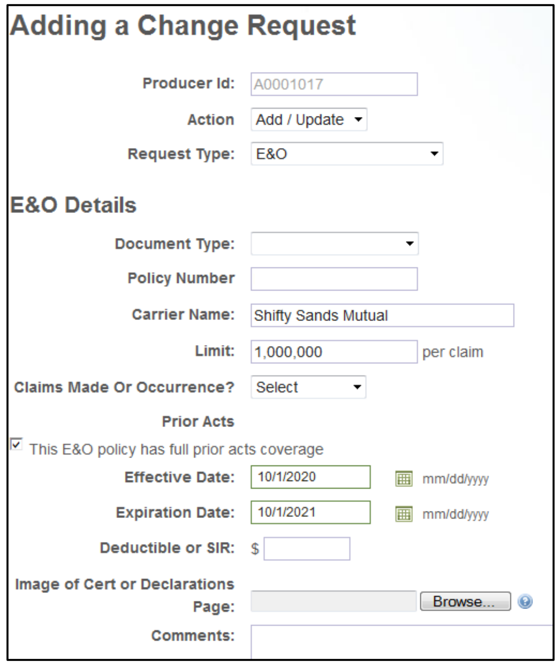
Complete the fields on the **New Change Request** and click **Save Changes**.

Fill the fields on the subsequent pages with the required information. These individual pages are pictured below.

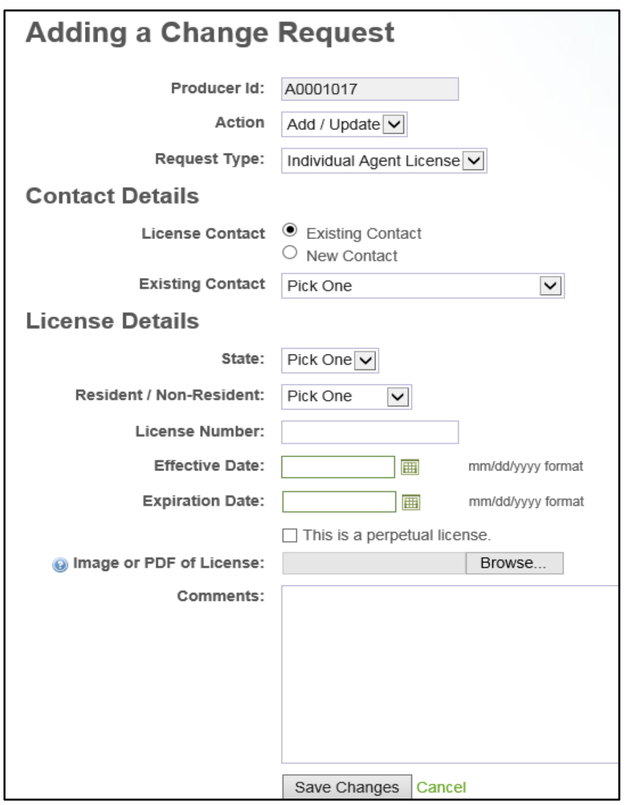
Agency License



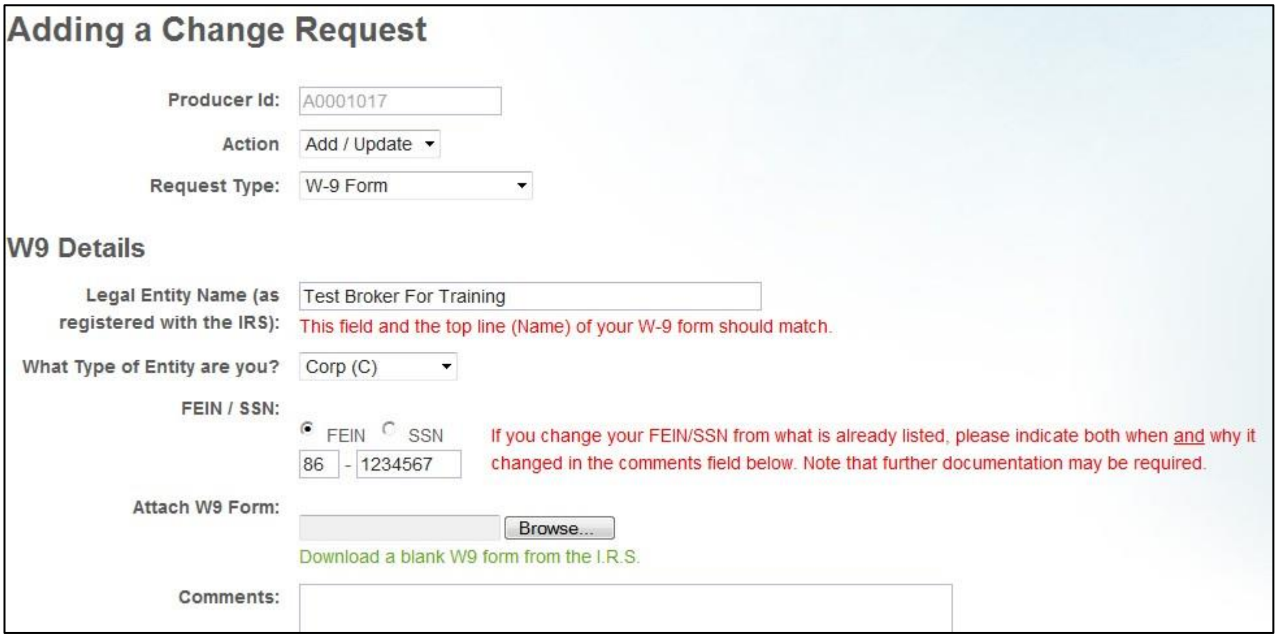
E&O



Individual Agent License



W-9 Form



Adding a Change Request

Producer Id: A0001017

Action: Add / Update

Request Type: W-9 Form

W9 Details

Legal Entity Name (as registered with the IRS): Test Broker For Training

This field and the top line (Name) of your W-9 form should match.

What Type of Entity are you? Corp (C)

FEIN / SSN: FEIN SSN 86 - 1234567

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: Browse...

Download a blank W9 form from the I.R.S.

Comments:

Open Change Request

Open Change Request should not be used within MyRPS.

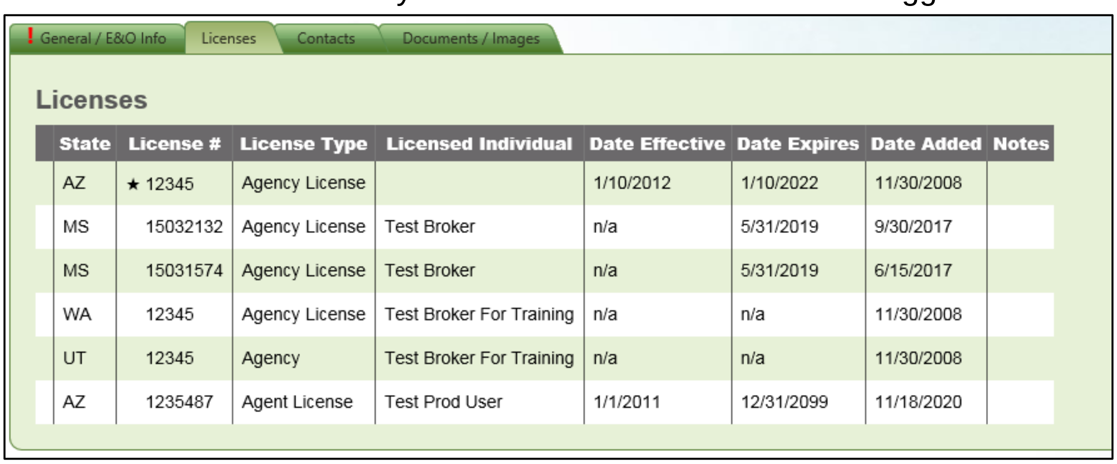
Closed Change Request

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.



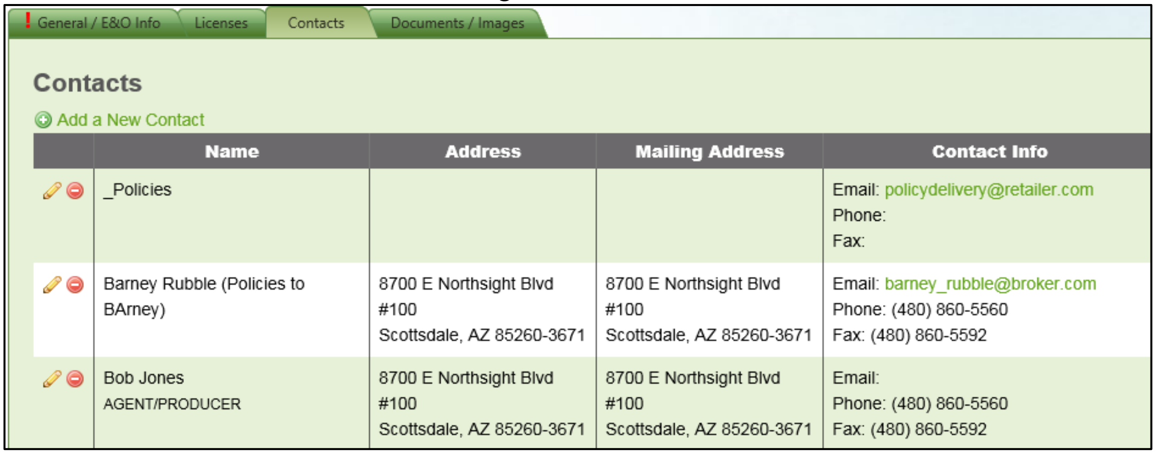
General / E&O Info | Licenses | Contacts | Documents / Images

Licenses

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	

Contacts

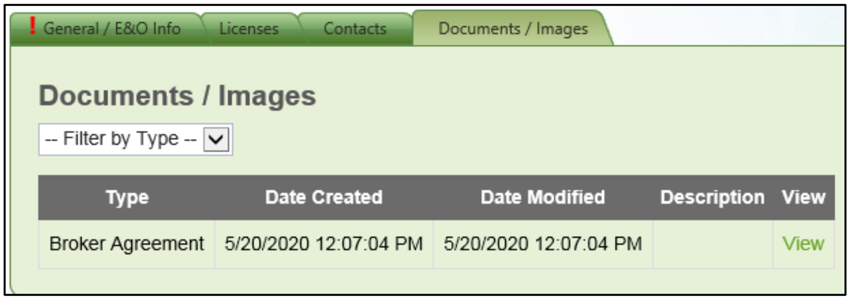
View, edit or add contacts for an organization on the **Contacts** tab.



	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

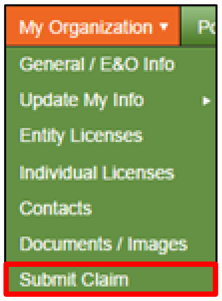
Documents / Images Tab

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

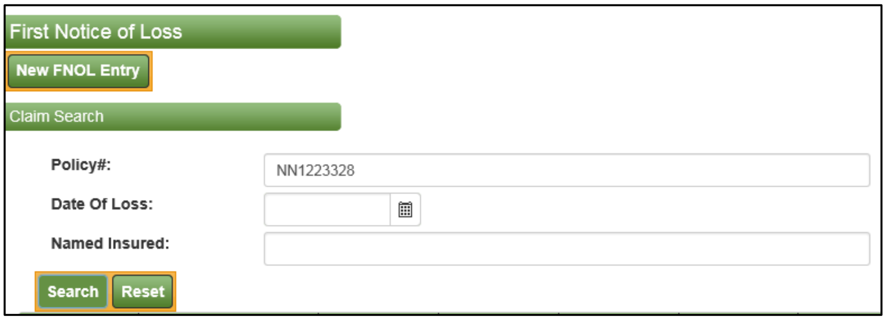


Type	Date Created	Date Modified	Description	View
Broker Agreement	5/20/2020 12:07:04 PM	5/20/2020 12:07:04 PM		View

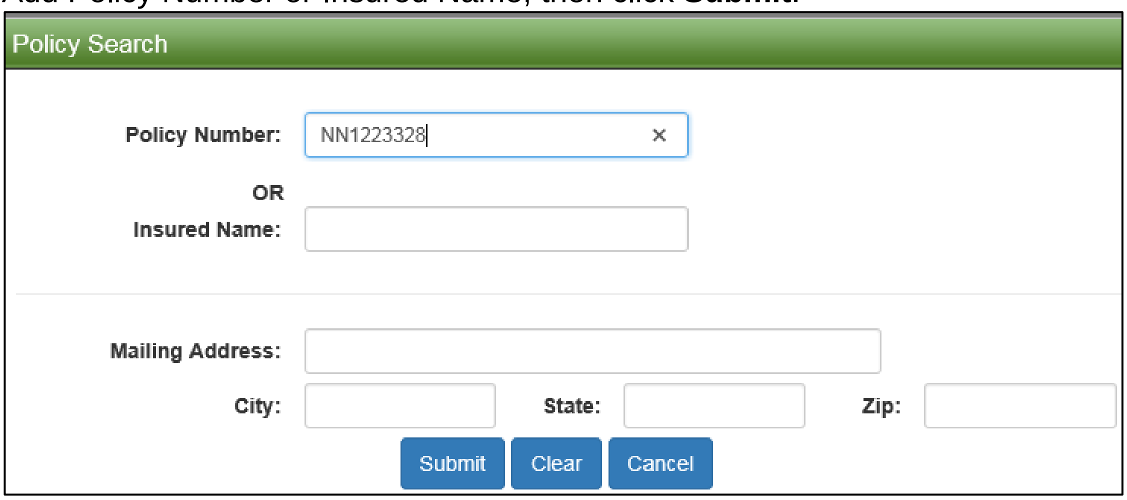
Submit Claim



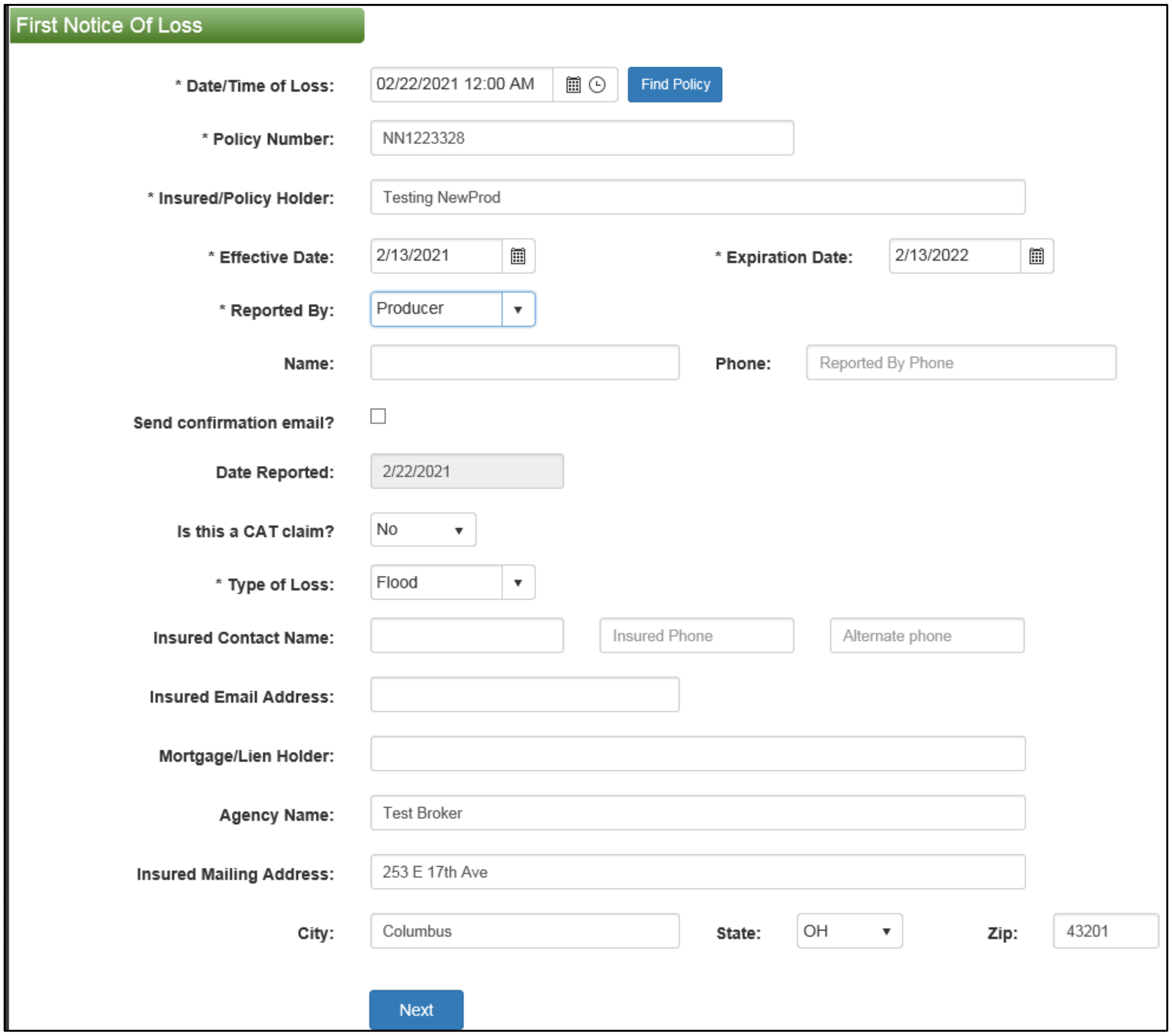
Retailers can view any current claims on the **Submit Claim** field by searching **Policy#** or **Named Insured**. To complete the search with selected parameters, click **Search.** Click **Reset** to clear entries.



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

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



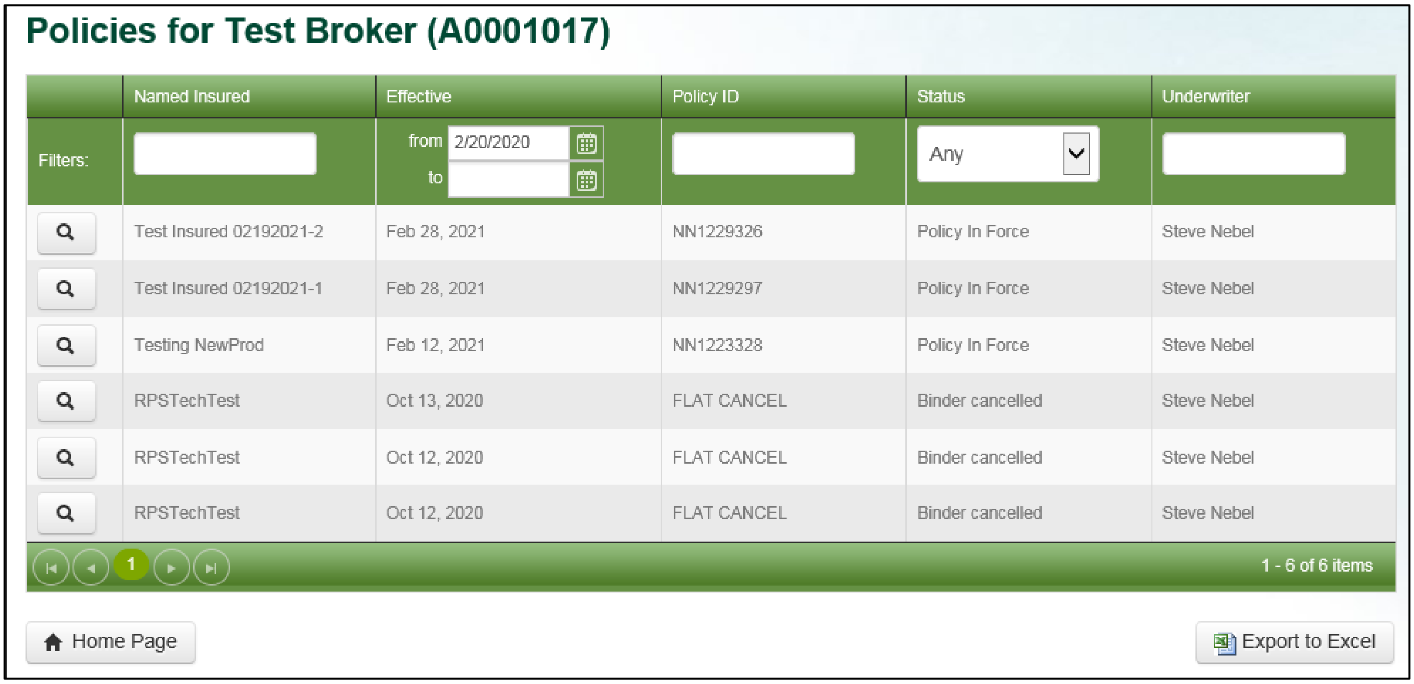
Step 4:	Complete the additional required information on subsequent pages, clicking **Previous** or **Next** to navigate between pages. Add any attachments on the final page and click **Submit**.

Note: Contact the Claims Department for further instructions and questions on online claims.

MyRPS *Retailer Basic Navigation Job Aid*

Policies

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:		from 2/20/2020 to		Any	
	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

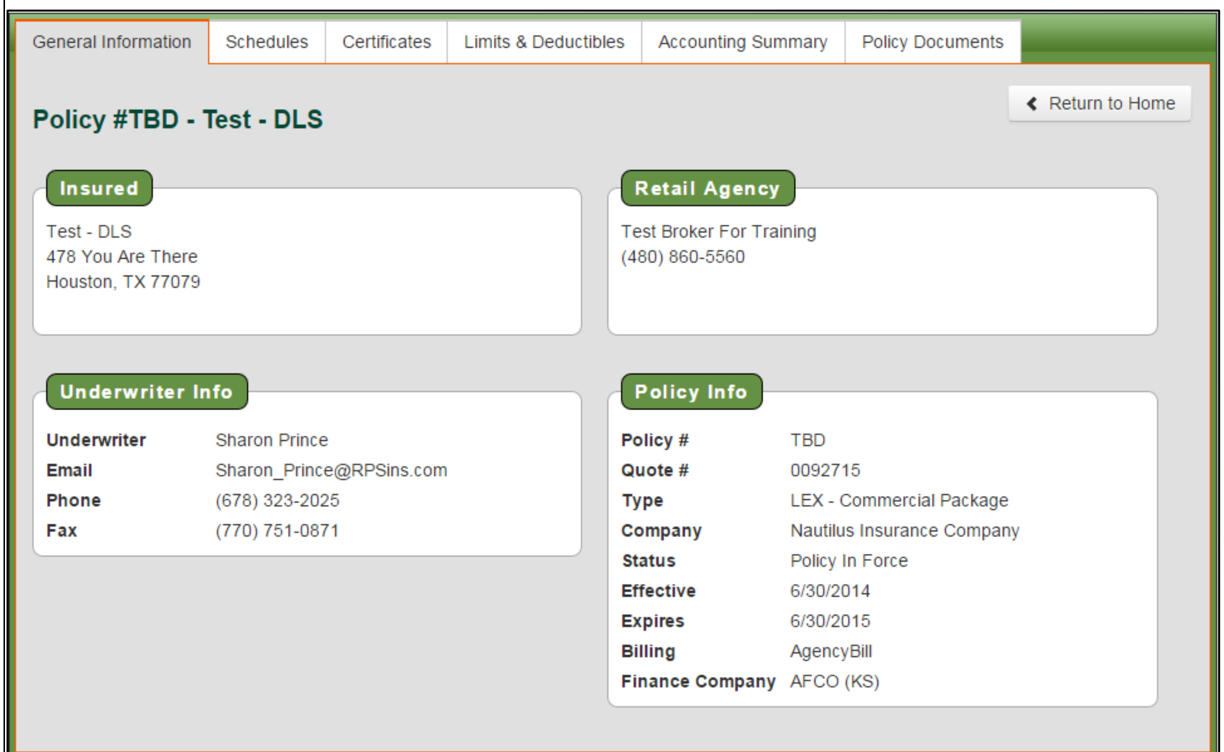
Home Page

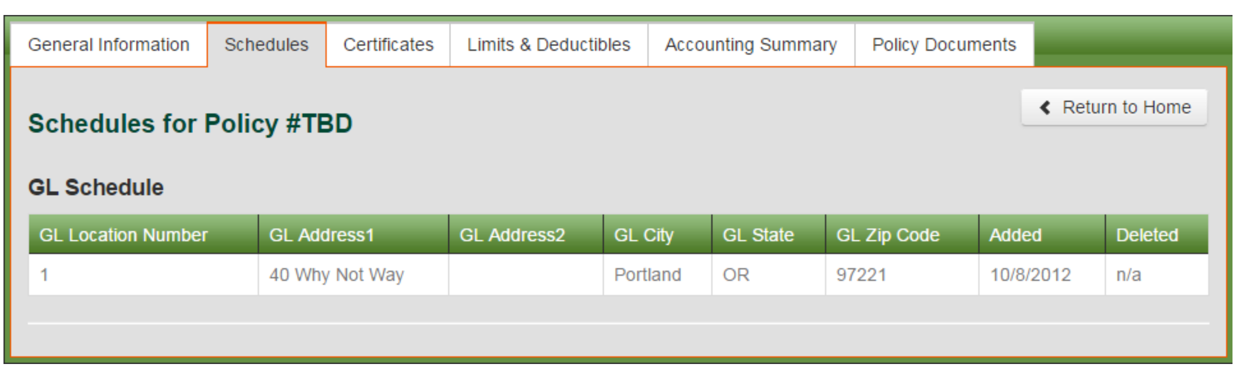
Export to Excel

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

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.

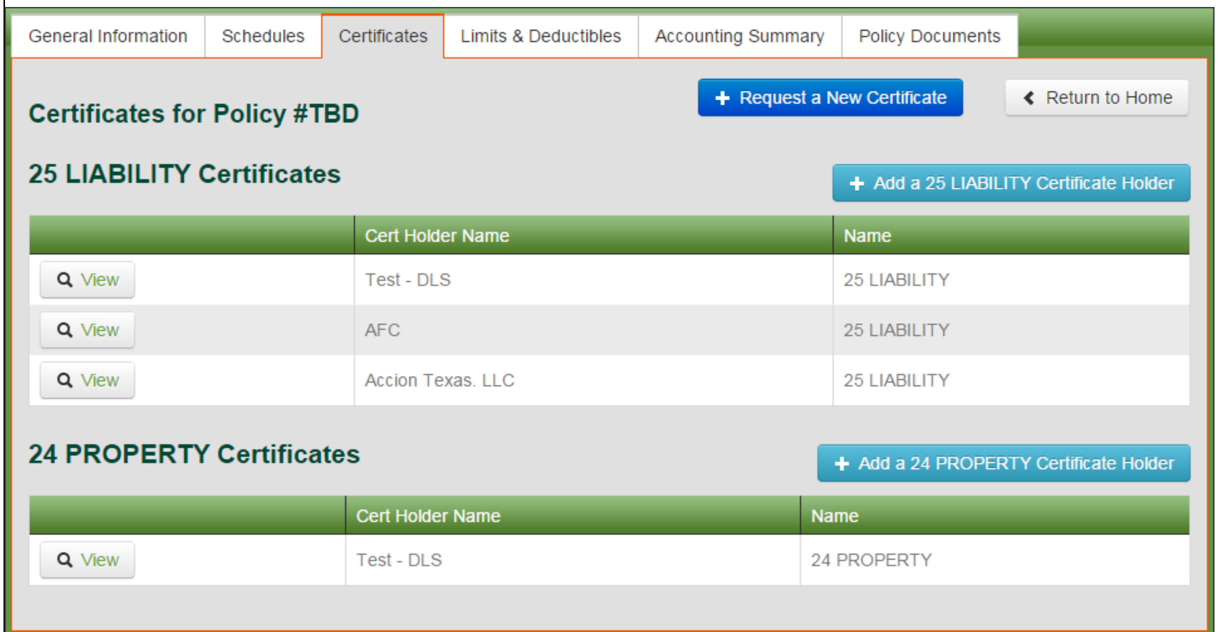
<table>
<tr><th>Tab Name</th><th>Available Information</th></tr>
<tr><td>General Information</td><td>General information regarding the policy.


</td></tr>
<tr><td>Schedules</td><td>Only available if a schedule is added to the policy.


</td></tr>
</table>

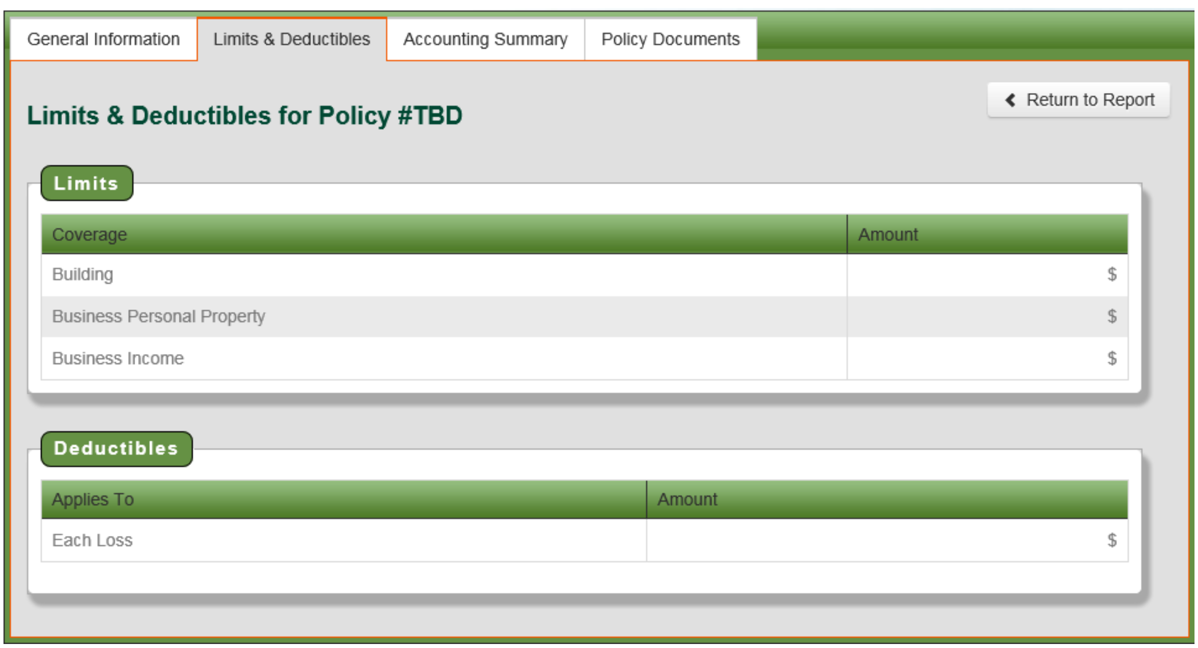
Certificates

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.

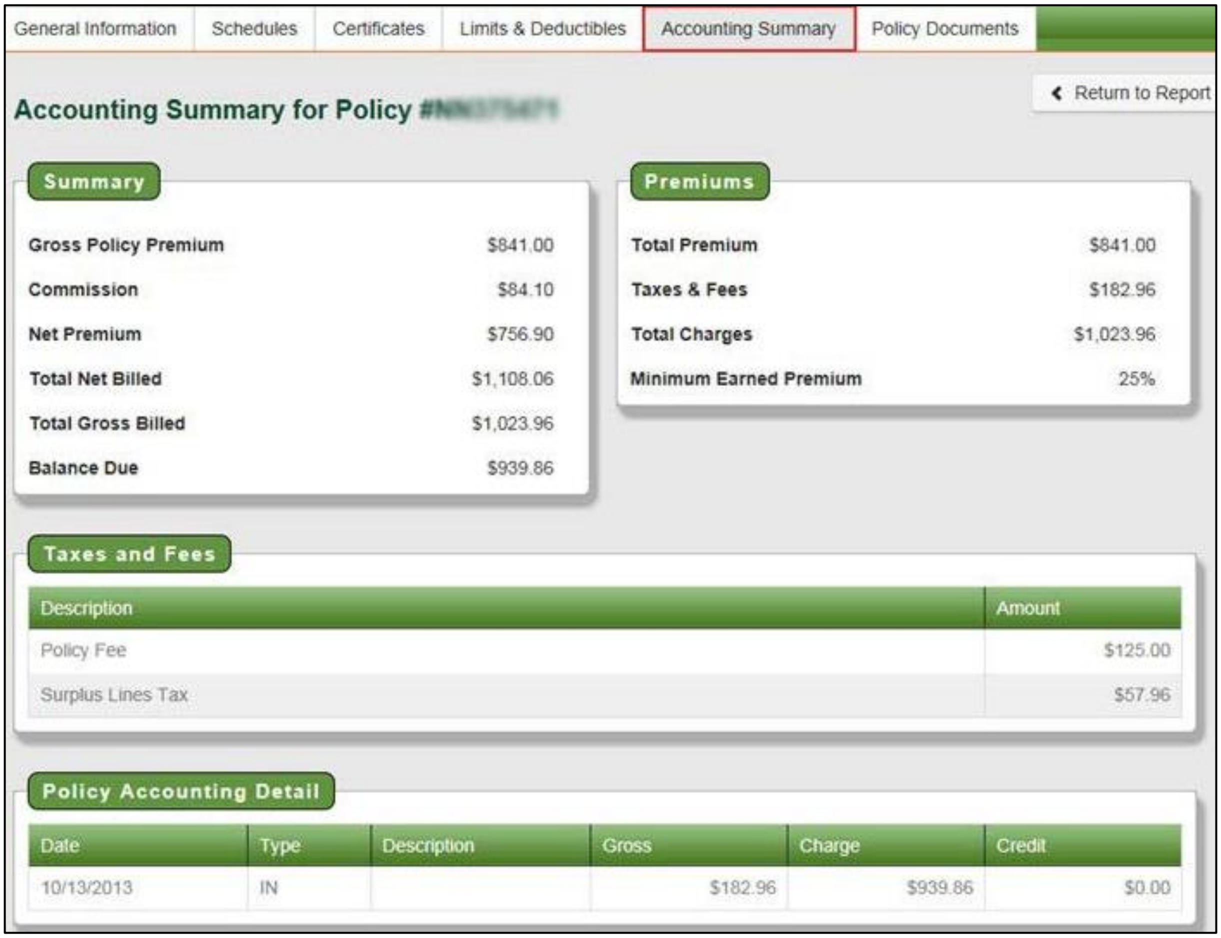


Limits & Deductibles

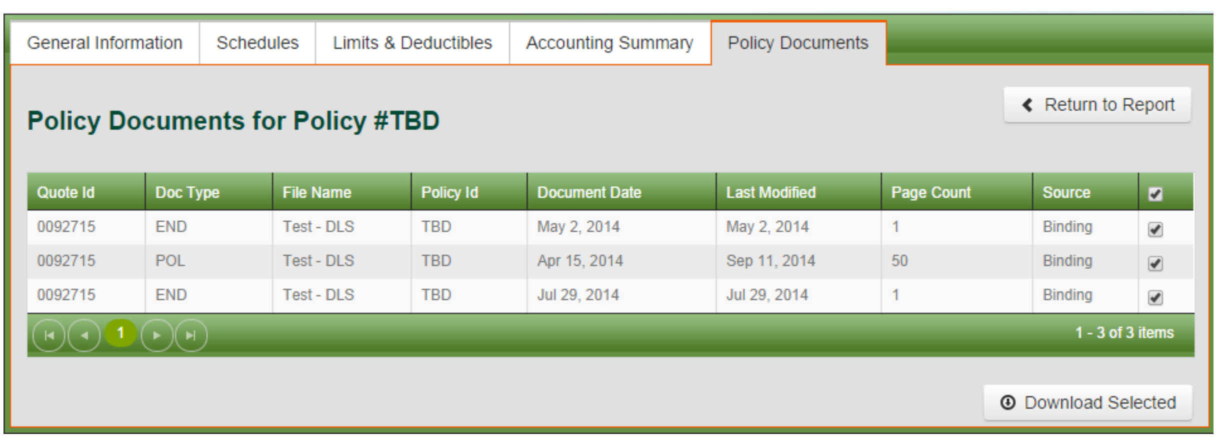
View policy limits and deductibles.



Accounting Summary	Provides detailed policy accounting information.



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.



Reports

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

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

Accounting Contact for Multiple Locations

Information

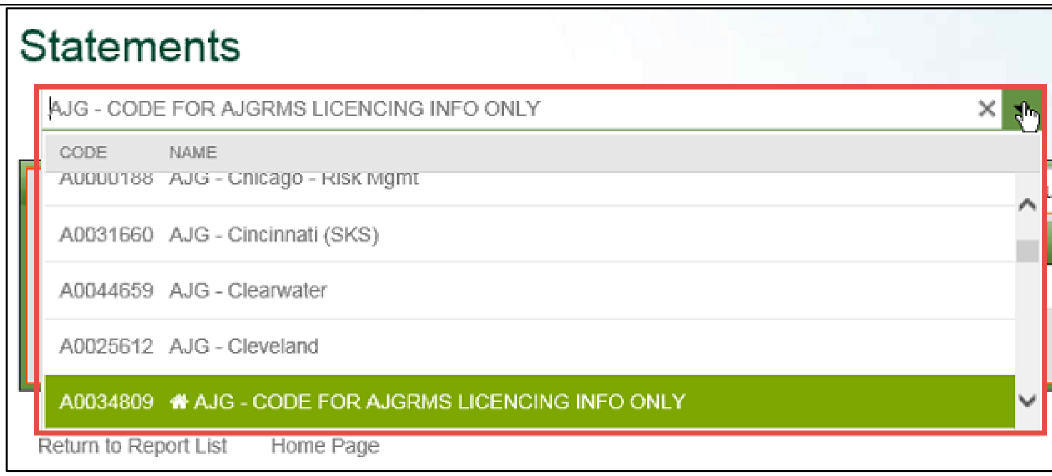
If you are the accounting contact for multiple locations, you are able to view statements for all locations to which you are assigned. You are determined the accounting contact for a specific location in two locations: 1) on the initial onboarding application (my.rpsins.com), and 2) on the **Add New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

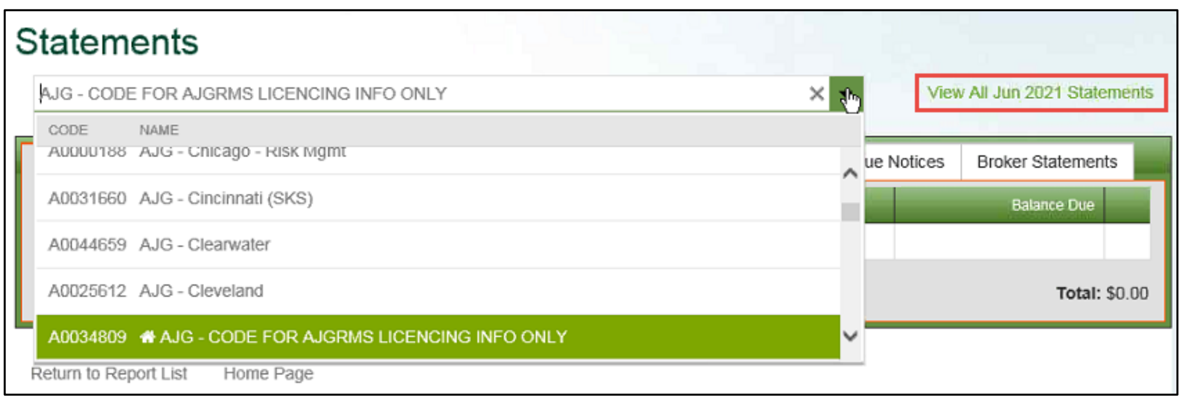


Once a location is selected, there are a variety of invoices and statements available to view:

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.

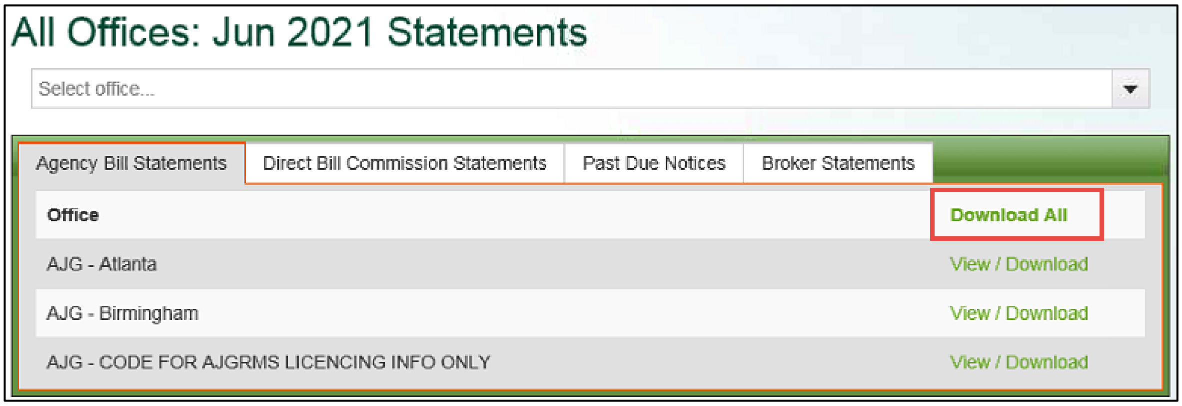
Step 4:

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

1. **Agency Bill Statements**

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**.



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**.