

Chubb Agent Portal User Guide

June 2021

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Introduction

What is the Chubb Agent Portal?

The Chubb Agent Portal is the new application that replaces @chubb. The system will provide agent users centralized access to data, alerts, and applications.

The agent portal is made up features and dashboards that are driven by the type of business you have access to. If you have access to personal lines, you will see the personal lines dashboard. If you have access to business lines, you will see the business lines dashboard. If you have access to both personal and business lines, you will see a toggle in the top right of your dashboard, which will allow you to easily switch between your dashboards. [Please note: Our first release is focused on the personal lines dashboard. The business lines dashboard and toggle for users who access both will be released soon.]

After both dashboards are available, agents with access to both will be able to change their preferred default dashboard at any time via the Profile and preferences page, accessible from the burger menu.



Depending on the access level you have been assigned by your agency administrator for each type of business, certain features outlined in this user guide may not be available for your user ID. Please contact your agency administrator to request an update to your access if needed.

Additionally, based on the business you write with Chubb, some applications may not be available. Please contact your local branch representative with any questions.

To view a full listing of applications and services provided by the agent portal, please visit: <https://www.chubb.com/us-en/chubbagentportal.html>

A note on browsers: To access the New Chubb Agent Portal, please use the most recent version of: Google Chrome, Microsoft Edge, Firefox, or Safari. If users are unable to upgrade their browser, they will be directed to the current @chubb experience.

A note on Users with access to both Personal Lines and Business Lines: The New Chubb Agent Portal for Business lines is coming Summer 2021. Until then, users that have access to both Personal Lines and Business Lines applications will have a link to access the Chubb Agent Portal Personal Lines dashboard under Quick Links in the current @chubb experience. Users that have access to only Personal Lines applications will be automatically navigated to the new Chubb Agent Portal experience.

Personal Lines Features

Key features for Personal lines agents include easy ways for you to search for a client, endorse a policy, retrieve a quote and start a new quote.

We've also added an at-a-glance view of new alerts, quicker access to tools and services, and easier-to-find highlights on PRS products and features.

Header and Menu Features

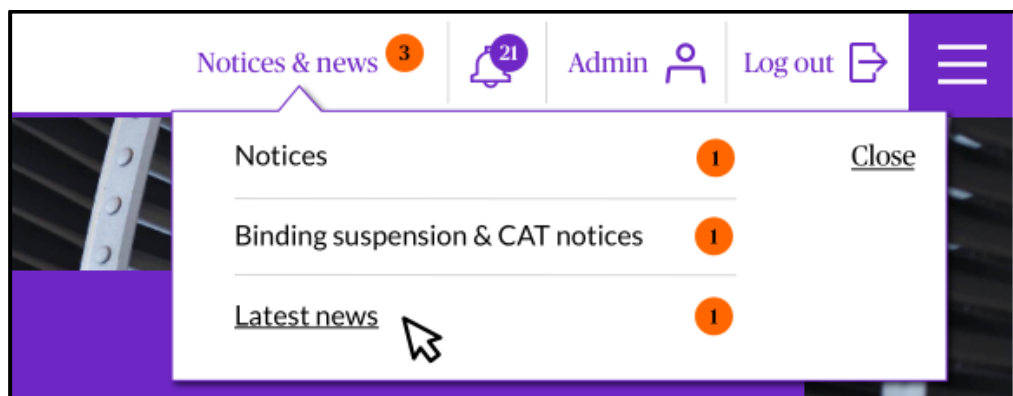
The Chubb Agent Portal header includes several features, outlined below. In addition, you can click the Chubb logo or “Agent Portal” text to return to the dashboard from any screen.

If there are any critical messages available, they will be presented directly under the header. Click “read more” to see additional info, or the “x” icon to dismiss. Dismissed messages will not be shown again on your next login on the same device.

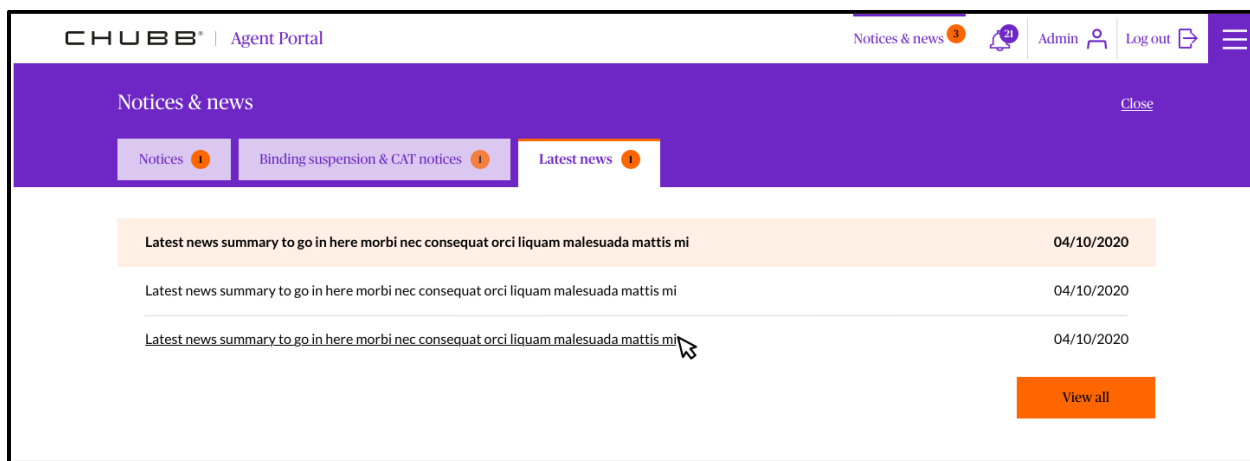


Notices and News


At the top of the page, you’ll see links for Notices and News, including general *Notices*, *Binding Suspensions* and *Catastrophe notices*, as and the latest *Chubb News*. The header will reflect a total count of unread items since your last login. Upon expand the screen, you will see unread counts for each area.



Click on any section to expand the tab and click between tabs to view information for each. Click “View All” on any tab to view all data available within the section. Click “Close” to return to the Dashboard.

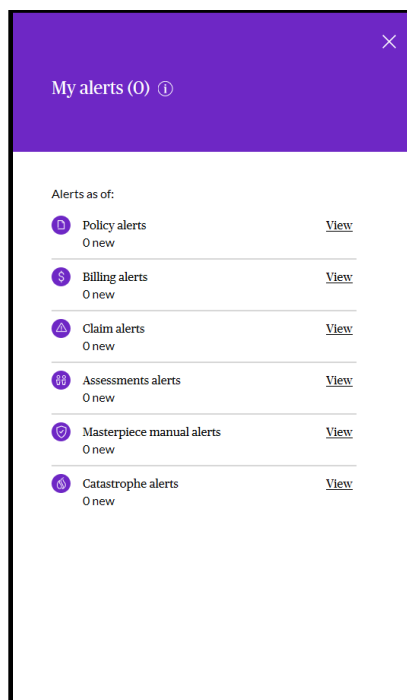


My Alerts

The header contains another convenient way to access your alerts, especially if you are in other applications. You'll see a total count of current alerts; click the bell icon  to expand the section.

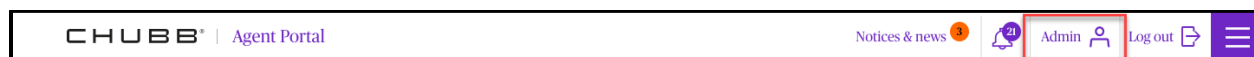
All alert types will be shown, even if no alerts are currently available. Simply click “View” next to any alert. Once clicked, you'll be taken to your My Alerts Desktop. You'll have the ability to navigate that category and all other alerts you have today.

If you are also a Business Lines agent, this icon and slide out will include a tab and count for Business “My Notifications” as well (when business lines dashboard is released).




Admin

Click here to access the new Access Management Portal, the replacement of the EAS system, as well as the administer my alerts link.



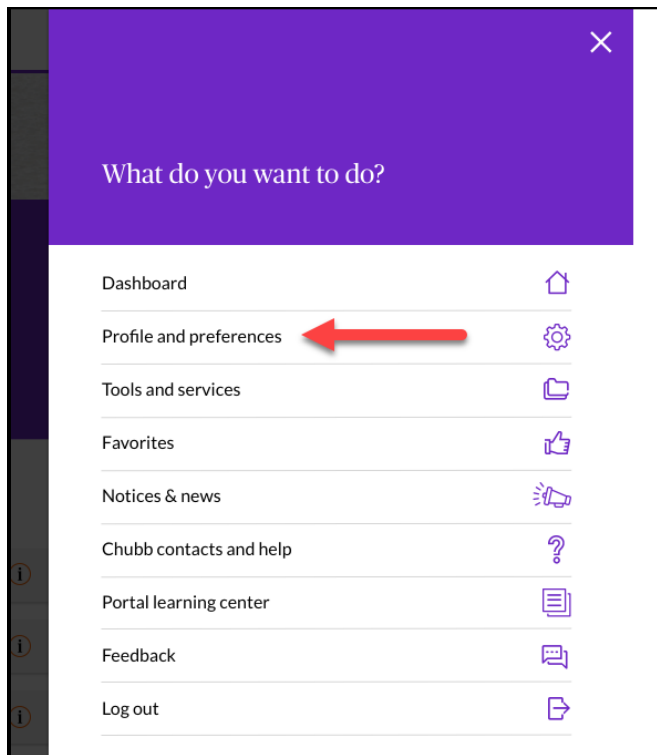
Burger Menu

Our new navigation, or burger, menu opens to quick links to return to your dashboard, update your profile, access the new ‘Portal learning center’ page, access tools and services quickly from other applications, and more.

Click the  icon to expand the menu.

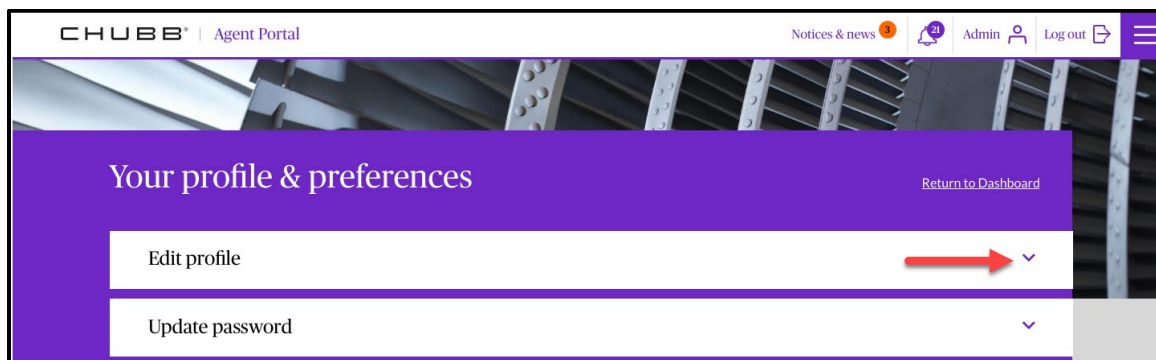
Profile and Preferences

To view or update profile information, or change your password, access the Profile and Preferences page from the burger menu:



Edit Profile

To edit your profile, click the down arrow on the edit profile section to expand the screen:



To make updates to your information, click in any text box. Once changes are made, the “Save Changes” button will enable. Click “Save Changes” to save or “Return to Dashboard” to return to the homepage.

Your profile & preferences [Return to Dashboard](#)

Edit profile

Here are the details we have for your profile. This information is used to improve our support efforts, pre-fill user information in other Chubb applications, and help drive targeted communications from Chubb.

First name Mike	Last name Smith
Street address line 7201 W Lake Mead #400	City Las Vegas
State/Province Nevada	Country United States
Email address mike@email.com	Phone number (555) 555-1234
Agency name ABC Corporation	Agency Title CSR
Producer License # (optional) 00099999-000	

[Cancel](#) [Save changes](#)

Update Password

To change your password, click the down arrow on the Update Password section to expand the screen:

CHUBB® | Agent Portal [Notices & news](#) [Admin](#) [Log out](#)

Your profile & preferences [Return to Dashboard](#)

Edit profile

Update password

From here, enter your current password followed by your new password, making sure you follow the guide. Confirm your new password by entering a second time and click “Save Changes.” If at any time you need to see what you entered, click the icon.

Update password

Fill out the form below to change your Agent Portal account password.

Current password

New password

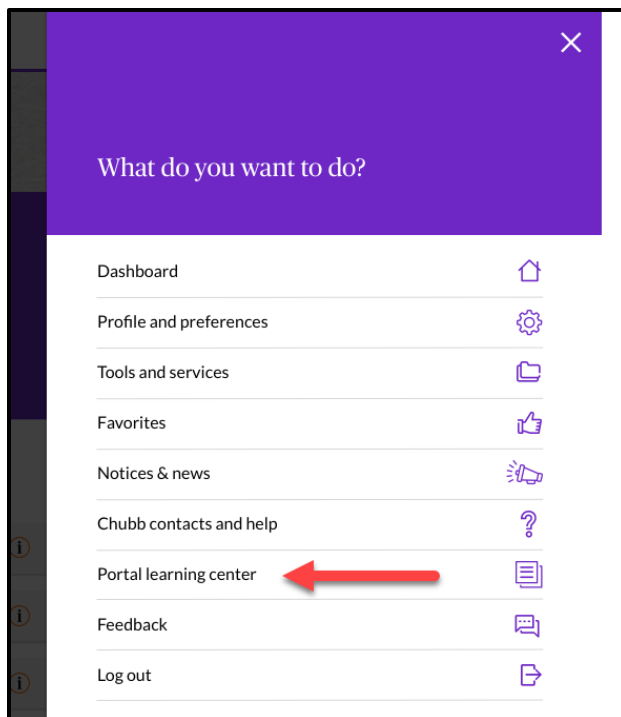
Confirm new password

Cancel Save changes

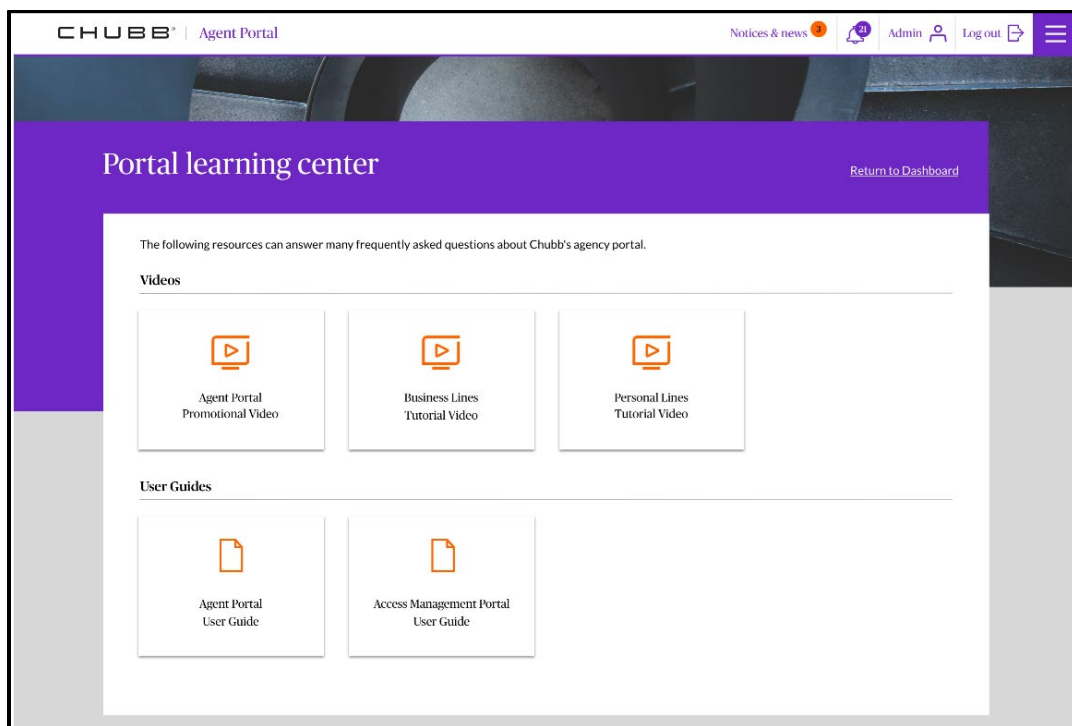
Password Strength:
• Cannot match your User ID, First or Last name
• Minimum 8 characters
• Have at least 1 capital letter and 1 lower case letter
• Have at least 1 number

Portal Learning Center

The Portal Learning Center contains important information to help you navigate the new portal, including user guides and helpful videos. To access, simply click the link from the burger menu:

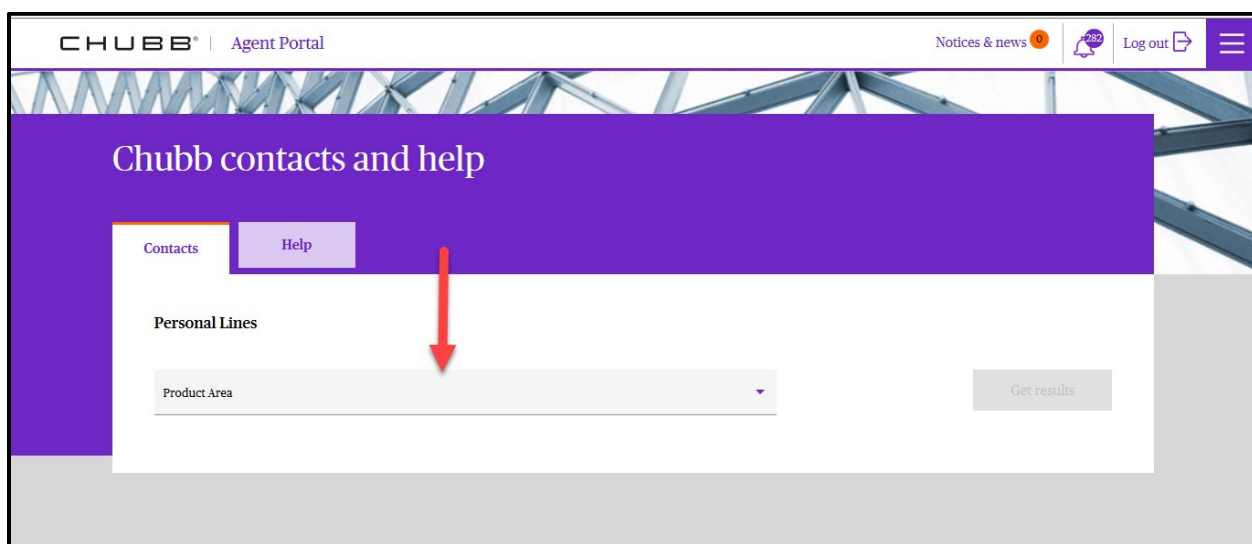


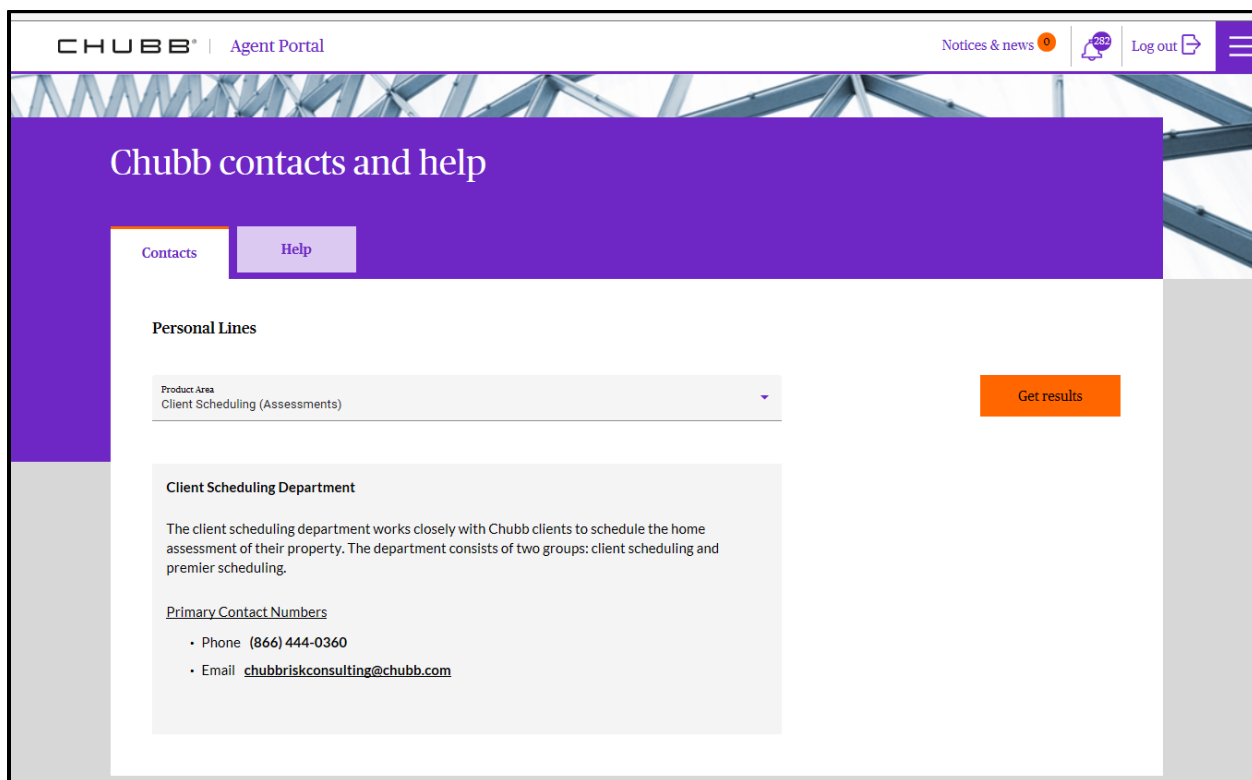
From here, click any link to view the content or click “Return to Dashboard” to go back to your homepage:



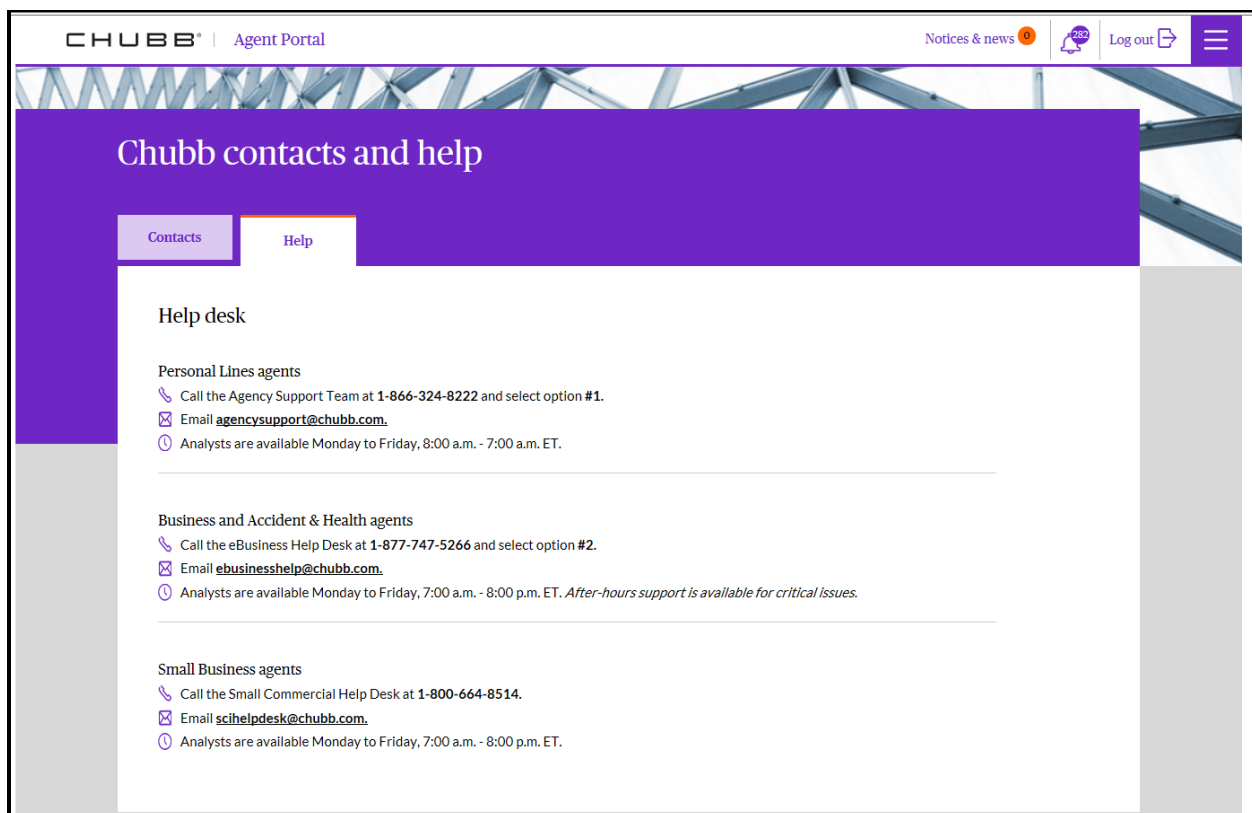
Chubb Contacts and Help

To access Chubb Contacts and Help, click the burger menu and choose “Chubb contacts and help.” By default, you’ll land on the Contacts tab. Select a product area from the drop down to view Chubb Contacts.





To view Help Desk information, click the “Help” tab. Help Desk information can also be found at the bottom of your Dashboard page.



Feedback

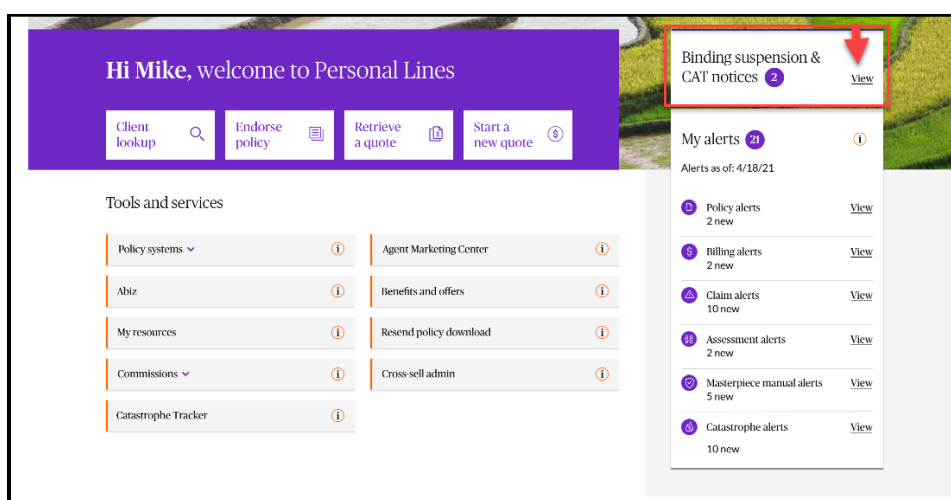
To access the Feedback feature, click the burger menu and choose “Feedback.” A new site will launch where you can enter your feedback and click submit.

Dashboard Features

The Dashboard provides several features including access to alerts, client lookups options, starting or retrieving quotes, and ability to endorse a policy.

Binding Suspension and CAT Notices

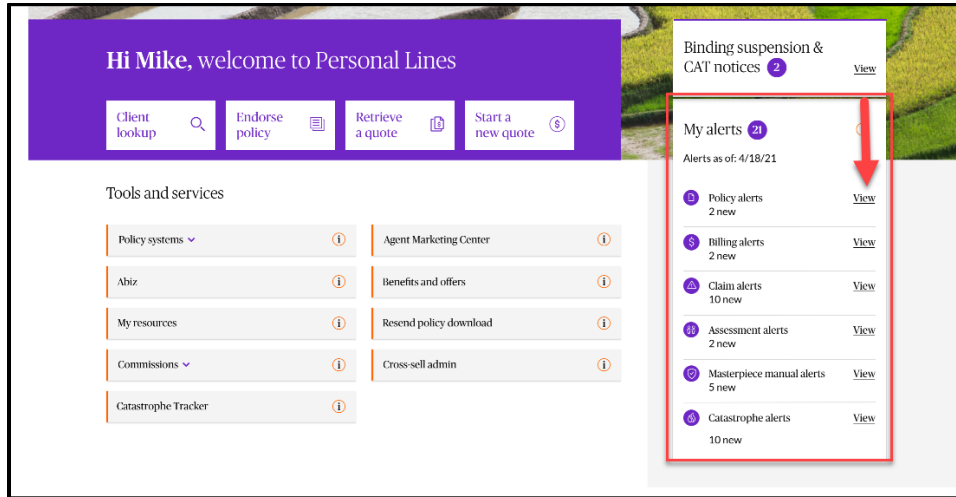
The Dashboard Binding suspension and CAT notices section provides a quick count of available notices. Click “view” to navigate to the Binding Suspension and CAT notices page to view all alerts.



My Alerts

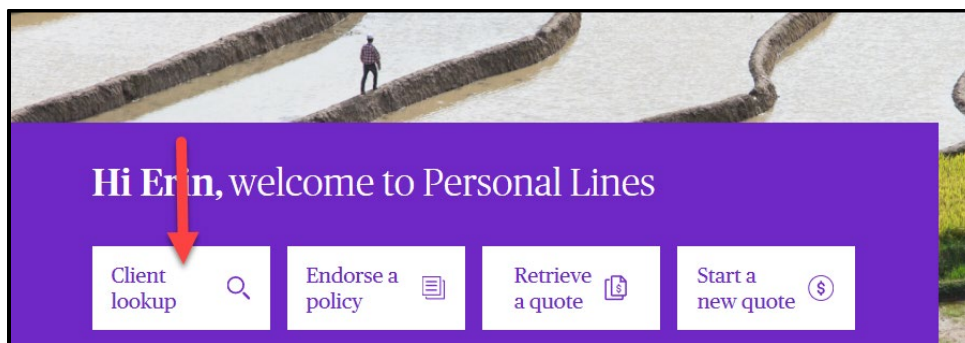
The Dashboard My alerts section allows you to view all your available alerts, including a date as to when the alerts were last updated. To view your alerts, simply click “View” next to any alert. Once clicked, you’ll be taken to your My Alerts Desktop. You’ll have the ability to navigate that category and all other alerts you have today.

All alert types will be shown, even if no alerts for that type are currently available.



Client Lookup

When you need to view client information, click “Client Lookup.” Here, you can enter either the policy number or the client’s name by clicking on either section. Once you enter the information, click “Go.”



Client lookup

Endorse a policy

Retrieve a quote

Start a new quote

There are two ways to find a client [Close](#)

Search by policy number

Policy number

Go

Search by client information

Client lookup

Endorse a policy

Retrieve a quote

Start a new quote

There are two ways to find a client [Close](#)

Search by policy number

Search by client information

Producer code

Last name

First name (optional)

State/Province

Based on the client's policy mailing address

Go

From here, you'll be taken to the new Client Centric Dashboard that replaces the current My Policies application.

CHUBB® Agent Portal

< Back to Search Results

John Smith

Premier Client

You can attach more policies to your client's portal account. Add policies.

Dashboard

- Policy Details
- Billing Accounts
- Claims
- Home Assessments
- Upload Documents

Policies

☒ Active / Pre Renewal ☐ Inactive ☐ Newline Quotes

Policy #	Description	Term	Status
1964781002	Home, Auto, Valuable Art...	06/22/20 - 06/22/21	Active
268310183	Valuable Articles	06/22/20 - 06/22/21	Active
1949200703	Home	06/22/20 - 06/22/21	Active

Showing 1 to 3 of 4 Policies Page 1 of 2 >>

Quicklinks

- [Proof of insurance](#)
- [Auto ID cards](#)
- [Report a claim](#)

Billing

\$400.00

Min. due on Nov 08, 2019

Account #
123456789

Enrolled in AutoPay

[View details](#) [Pay bill](#)

Claims

2 Open

040519001403 / Automobile
Policy # 1964781002
Loss Date: Feb 22, 2019

[View details](#)

Benefits & Offers

Explore exclusive services tailored to our client's lifestyle.

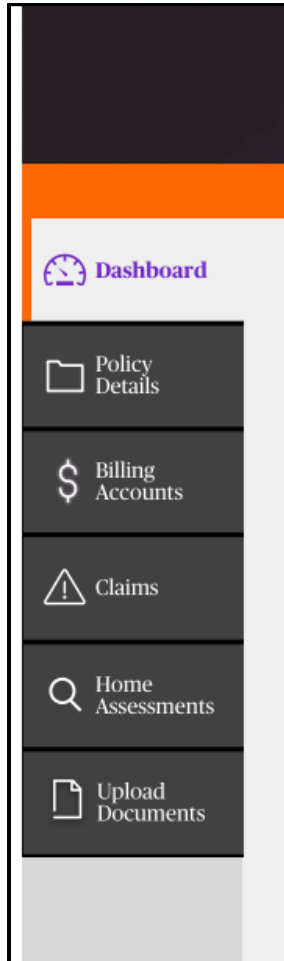
[Learn More](#)

We're here to help (877) 747-5266 Option 1 Mon-Fri 8-7pm ET [Email](#)

Chubb. Insured.™

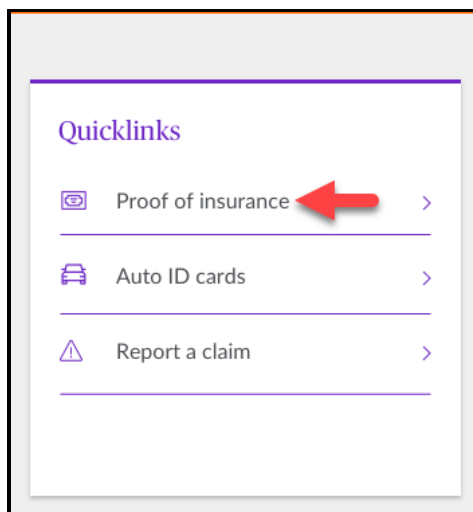
© 2020 Chubb Legal Notices Privacy Policy Producer Compensation Careers Contact Us

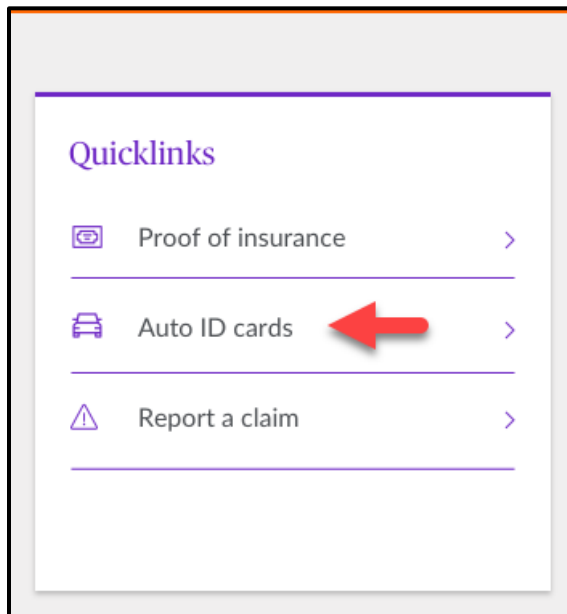
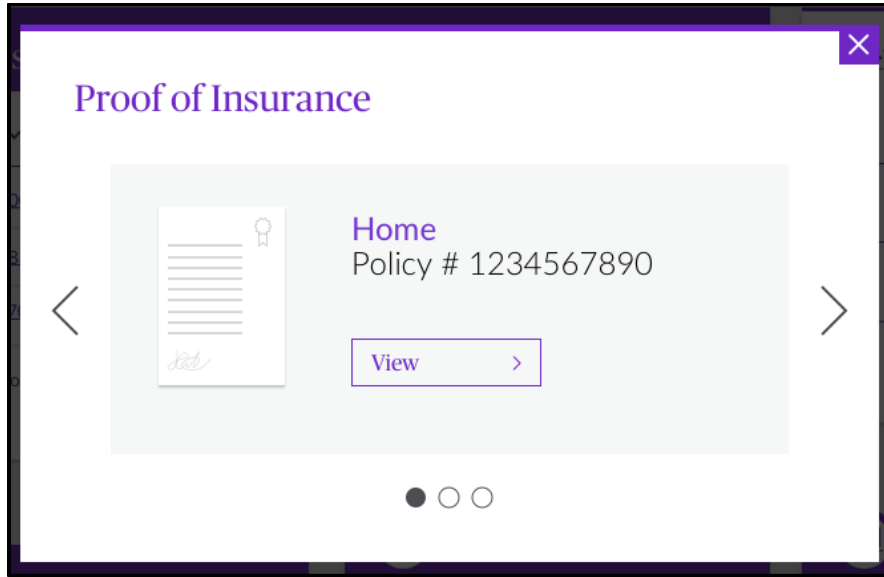
The client centric view will list all the policies in the client's household. Drill down to view specific policy details, billing accounts, claims, and home assessments for all the policies in the household. You can also upload policy documents.

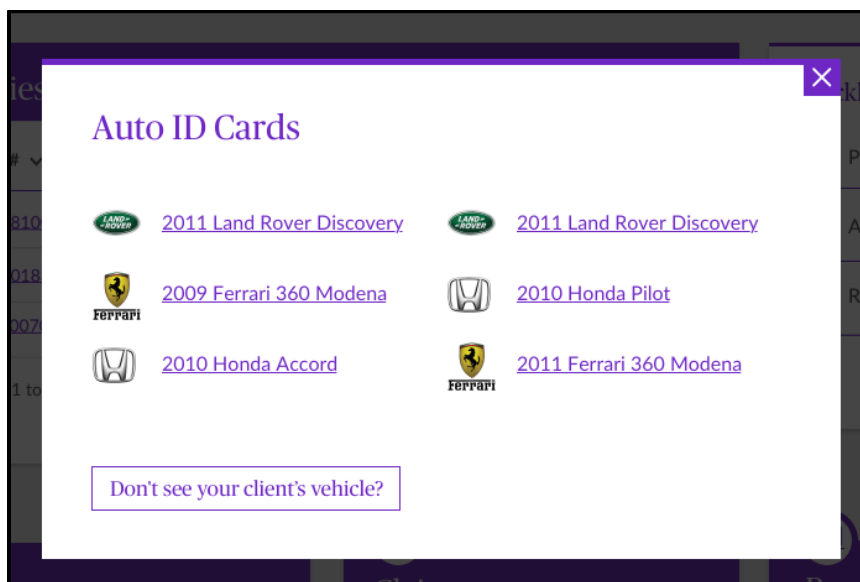


The new client centric dashboard introduces some new features:

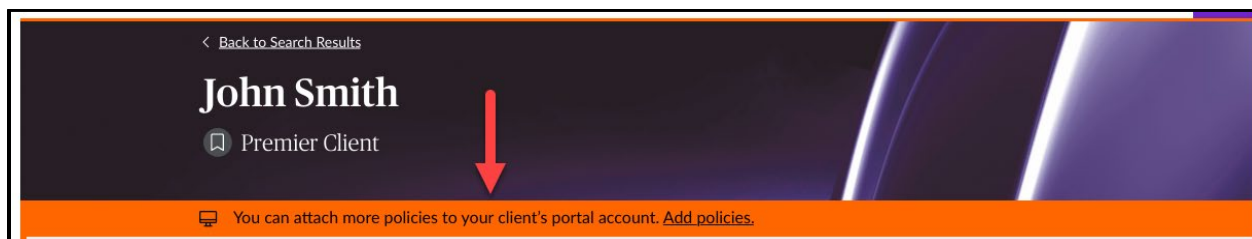
For each client, you will be able to view and download auto ID cards, as well as home and contents Proof of Insurance.







A message on the top of the screen will be presented when you can create a portal account for your client or add policies to their existing portal account.



The Billing card provides high-level view for all active billing accounts. Get more detailed information in the 'Billing Accounts' tab.

The screenshot displays the Chubb Agent Portal dashboard. At the top, a banner states: "You can attach more policies to your client's portal account. [Add policies.](#)". The left sidebar contains navigation links: Dashboard, Policy Details, Billing Accounts (highlighted with a red arrow), Claims, Home Assessments, and Upload Documents. The main content area features a "Policies" section with a table of active policies. Below this, there are three cards: "Billing" (highlighted with a red box), "Claims", and "Benefits & Offers".

Policies Table:

Policy #	Description	Term	Status
1964781002	Home, Auto, Valuable Art...	06/22/20 - 06/22/21	Active
268310183	Valuable Articles	06/22/20 - 06/22/21	Active
1949200703	Home	06/22/20 - 06/22/21	Active

Showing 1 to 3 of 4 Policies Page 1 of 2 >>

Billing Card:

- Amount: \$400.00
- Min. due on Nov 08, 2019
- Account #: 123456789
- Enrolled in AutoPay
- Buttons: View details, Pay bill

Claims Card:

- 2 Open
- # 040519001403 / Automobile
- Policy #: 1964781002
- Loss Date: Feb 22, 2019
- Button: View details

Benefits & Offers Card:

- Explore exclusive services tailored to our client's lifestyle.
- Button: Learn More

The Claims card provides a summary view of the open Claims in the household. And again, get more detailed information in the 'Claims tab'.

The screenshot displays the Chubb Agent Portal dashboard. At the top, a banner states: "You can attach more policies to your client's portal account. [Add policies.](#)". The left sidebar contains navigation links: Dashboard, Policy Details, Billing Accounts, Claims (highlighted with a red arrow), Home Assessments, and Upload Documents. The main content area features a "Policies" section with a table of active policies. Below this are three summary cards: Billing (\$400.00 due), Claims (2 Open, highlighted with a red box), and Benefits & Offers. The Claims card shows details for policy # 1964781002, including the loss date of Feb 22, 2019.

Policy #	Description	Term	Status
1964781002	Home, Auto, Valuable Art...	06/22/20 - 06/22/21	Active
18310183	Valuable Articles	06/22/20 - 06/22/21	Active
1949200703	Home	06/22/20 - 06/22/21	Active

Showing 1 to 3 of 4 Policies Page 1 of 2 >>

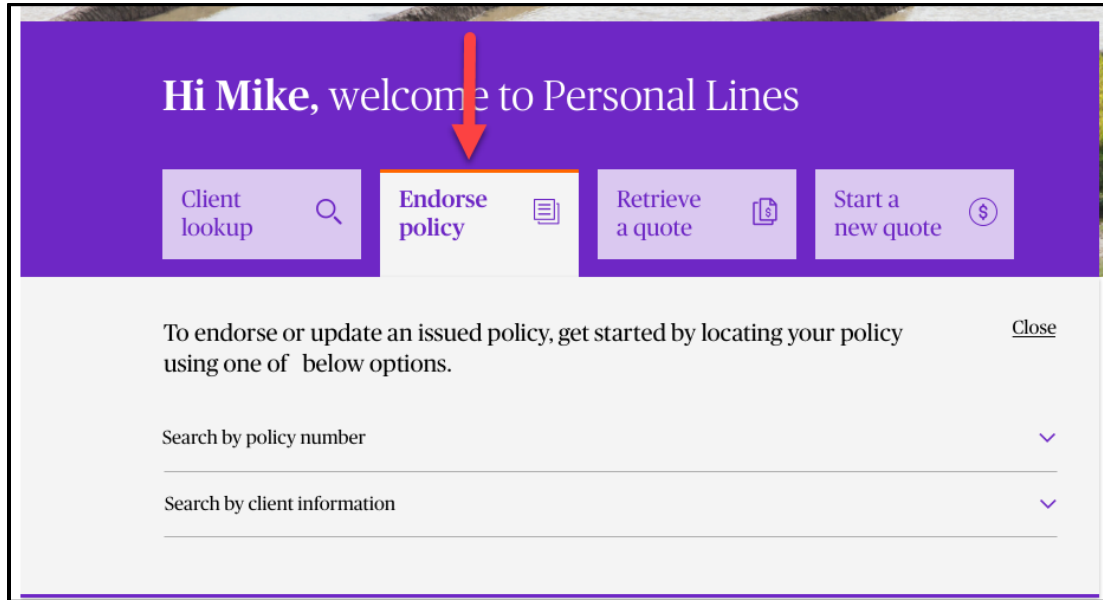
Billing
\$400.00
Min. due on Nov 08, 2019
Account # 123456789
Enrolled in AutoPay
[View details](#) [Pay bill](#)

Claims
2 Open
040519001403 / Automobile
Policy # 1964781002
Loss Date: Feb 22, 2019
[View details](#)

Benefits & Offers
Explore exclusive services tailored to our client's lifestyle.
[Learn More](#)

Endorse a Policy

To endorse or change a policy, select the 'Endorse a Policy' tab. Here, you can enter either the policy number or the client's name by clicking on either section. Enter the data and click "Go;" you'll then receive confirmation that you've retrieved the correct policy. Click "Go" again to launch the application and make your updates.



Hi Mike, welcome to Personal Lines

Client lookup Endorse policy Retrieve a quote Start a new quote

To endorse or update an issued policy, get started by locating your policy using one of below options. [Close](#)

Search by policy number

Search by client information

To endorse or update an issued policy, get started by locating your policy using one of below options. [Close](#)

Search by policy number

Policy number

1964781002

Go

Search by client information

We've found 1 result [Close](#)

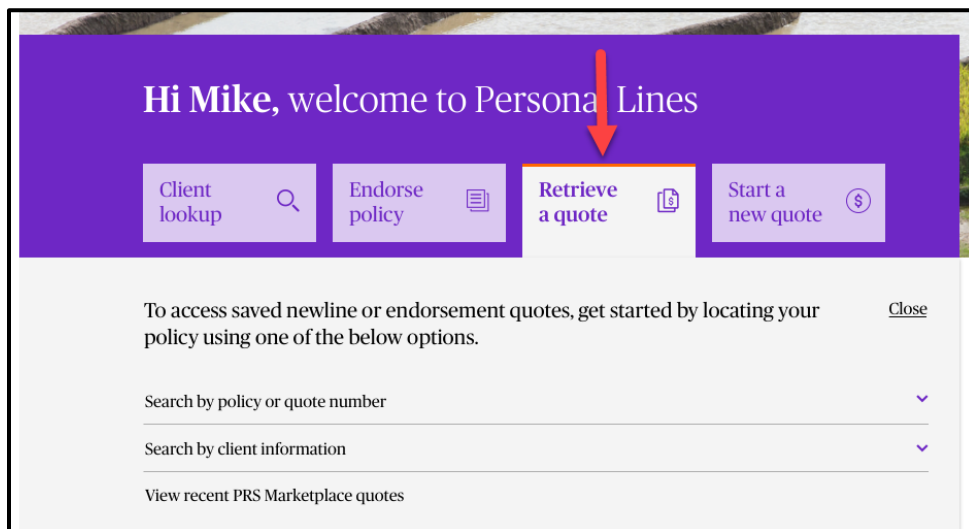
Client name	Policy/Quote #	Coverage	City/State
Jane Doe	2248748848	Home	New York

Clicking the 'Go' button will direct you to **Masterpiece Real-Time** to start the modification process for this policy

[Go back](#) Go

Retrieve a quote

To retrieve an existing quote, click the ‘Retrieve a quote’ tab. Here, you can enter the quote number, client information, or click to navigate to PRS Marketplace to view recent quotes. Enter the data and click “Go;” you’ll then receive confirmation that you’ve retrieved the correct policy. Click “Go” again to launch the application and view the information for the quote.



Hi Mike, welcome to Personal Lines

Client lookup Endorse policy **Retrieve a quote** Start a new quote

To access saved newline or endorsement quotes, get started by locating your policy using one of the below options. [Close](#)

Search by policy or quote number

Search by client information

View recent PRS Marketplace quotes

To access saved newline or endorsement quotes, get started by locating your policy using one of the below options. [Close](#)

Search by policy or quote number

Policy or quote number
2248748848

Go

Search by client information

View recent PRS Marketplace quotes

We've found 1 result [Close](#)

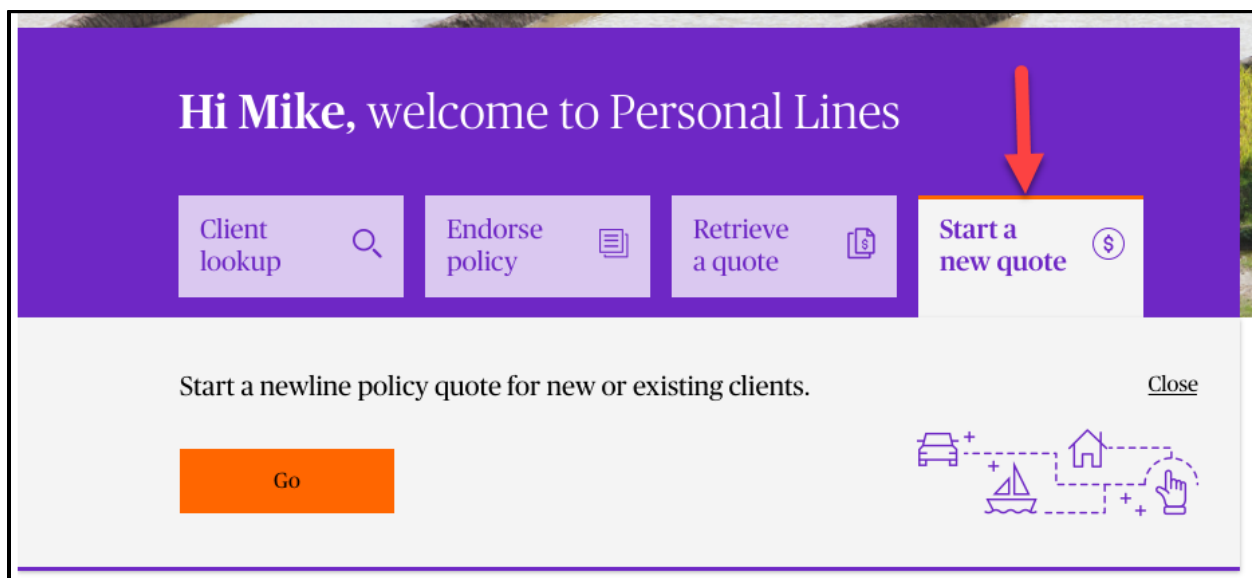
Client name	Policy/Quote #	Coverage	City/State	Status
Jane Doe	2248748848	Home	New York	Rated

Clicking the 'Go' button will direct you to the PRS Marketplace to complete the quote process

[Go back](#) Go

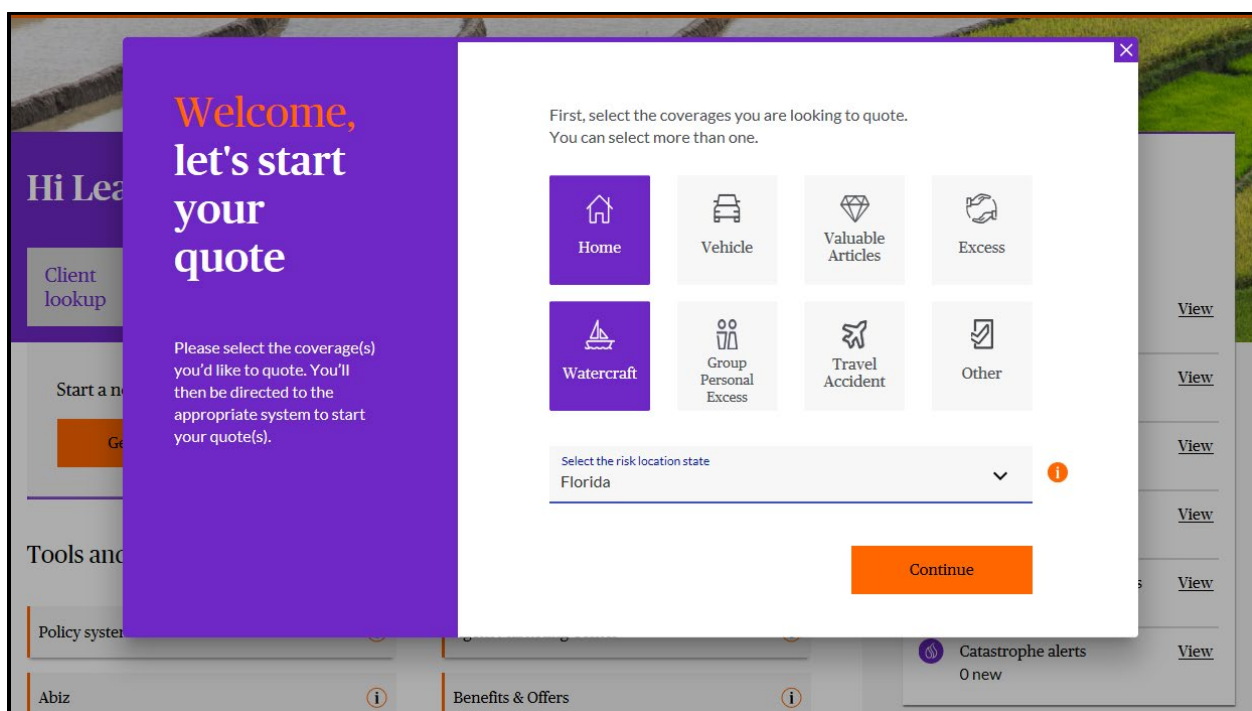
Start a new quote

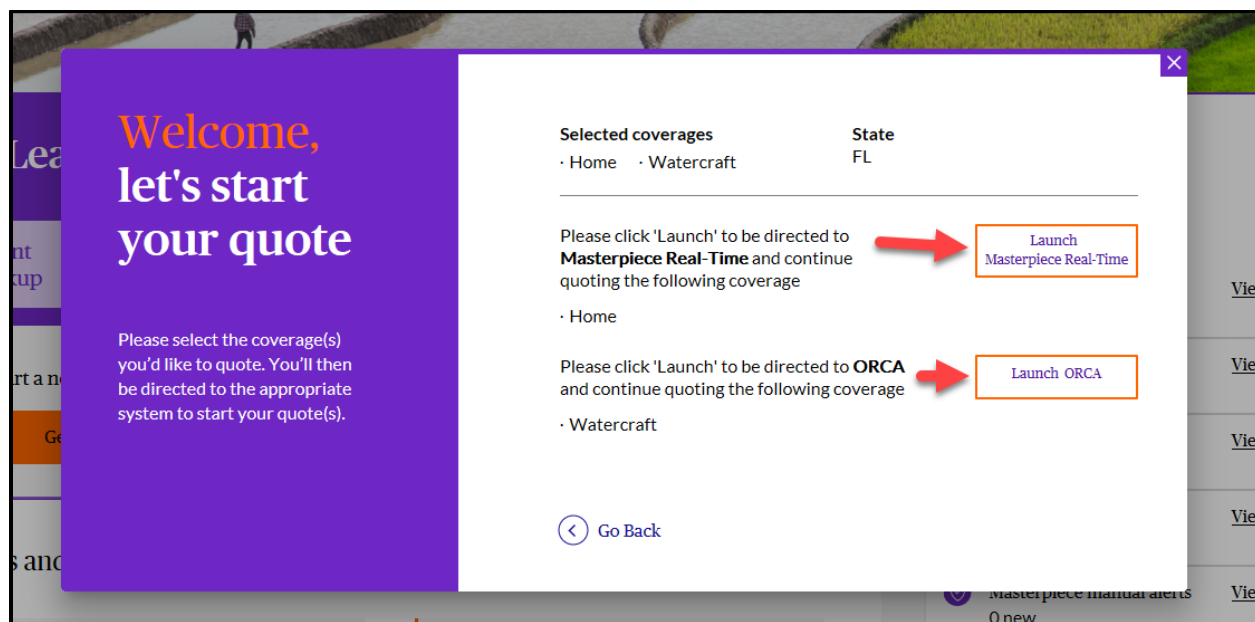
To start a quote, select the ‘Start a Quote’ tab and ‘Get a quote’.



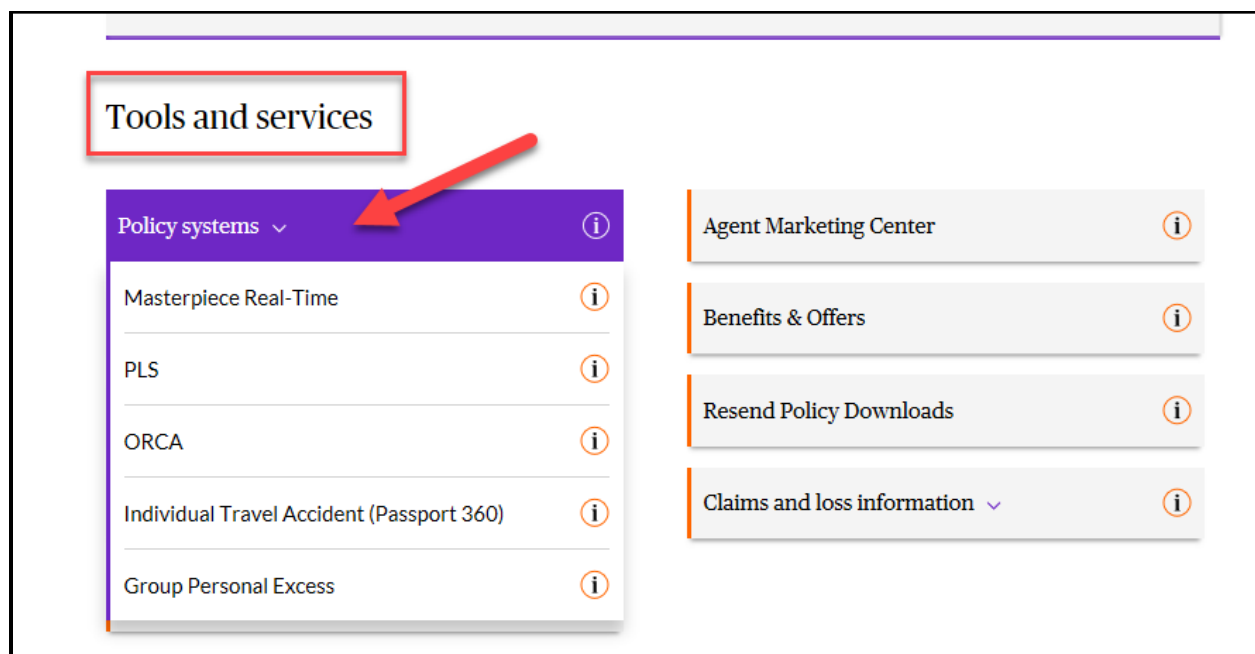
Next, choose the lines of business and state and click 'Continue.' If you've selected only one product, the appropriate system will launch. Otherwise, you'll be presented a list of each application you'll need to launch in order to quote, by product. Click launch to open the application in a new window.

No need for you to figure out where to go! The system does it for you.






Alternatively: If you know which system you need to access, click the 'Policy System' dropdown under Tools and Services and click to launch it.



Tools and Services

The Tools and Services section of the main dashboard contains quick links to frequently used applications, including **My Resources**, **Catastrophe Tracker** and the **Agent Marketing**

Center. Click any individual application to launch or click any boxes with a  to expand and view all available applications under that header. Then click any application to launch.

CHUBB® | Agent Portal Notices & news 1 21 Log out

Hi Mike, welcome to Personal Lines

[Client lookup](#) [Update policy](#) [Retrieve a quote](#) [Start a new quote](#)

Tools and services

Policy systems ⓘ	Agent Marketing Center ⓘ
Abiz ⓘ	Benefits and offers ⓘ
My resources ⓘ	Resend policy download ⓘ
Commissions ⓘ	Cross-sell admin ⓘ
Catastrophe Tracker ⓘ	

Binding suspension & CAT notices 2 [View](#)

My alerts 21 ⓘ

Alerts as of: 4/18/21

- [Policy alerts](#) 2 new [View](#)
- [Billing alerts](#) 2 new [View](#)
- [Claim alerts](#) 10 new [View](#)
- [Assessment alerts](#) 2 new [View](#)
- [Masterpiece manual alerts](#) 5 new [View](#)
- [Catastrophe alerts](#) 10 new [View](#)


Marketing Content and Help

To access Marketing and Product information, or to quickly find help desk contact information, scroll to the bottom of your Dashboard page. Click any content to launch.

Accessibility is beautiful

Families are spending more time in their own homes as they grow older. With Chubb, they can access support to make the transition simpler and easier.

[Learn more](#)



We're here to help

[\(877\) 747-5266 Option 1](#)
Mon-Fri 8am-7pm ET

[Email](#) >

Business Lines Features

Key features for Business lines agents include easy ways for to search for an account, view your book of business or search by product, view documents for your search criteria that are available digitally, and to quickly access quote and modify applications.

We've also added an at-a-glance view of new notifications, quicker access to tools and services, and easier-to-find highlights on Business lines products and features.

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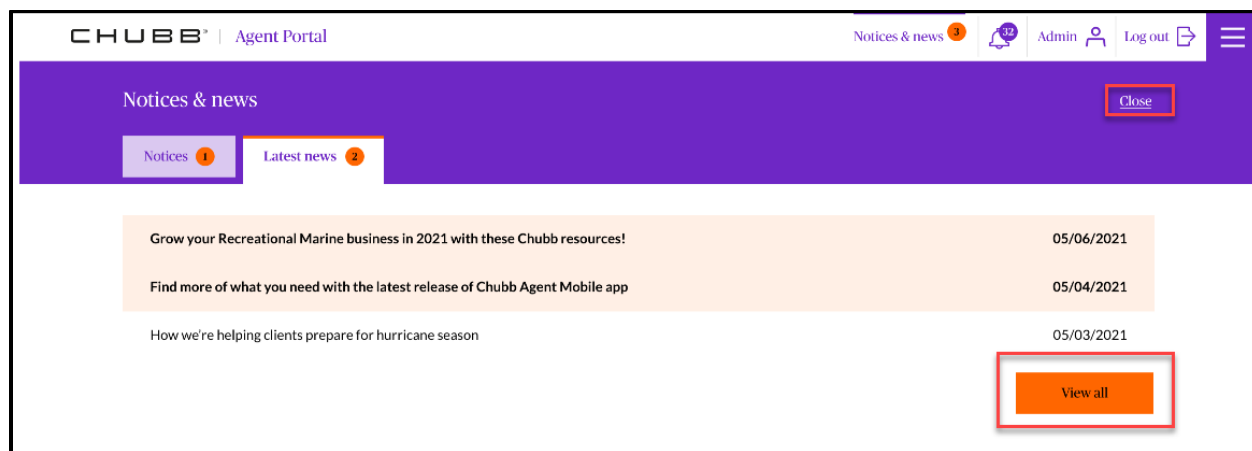


Notices and News


At the top of the page, you'll see links for Notices and News, including general *Notices* and the latest Chubb *News*. The header will reflect a total count of unread items since your last login. Upon expand the screen, you will see unread counts for each area.



Click on any section to expand the tab and click between tabs to view information for each. Click “View All” on any tab to view all data available within the section. Click “Close” to return to the Dashboard.

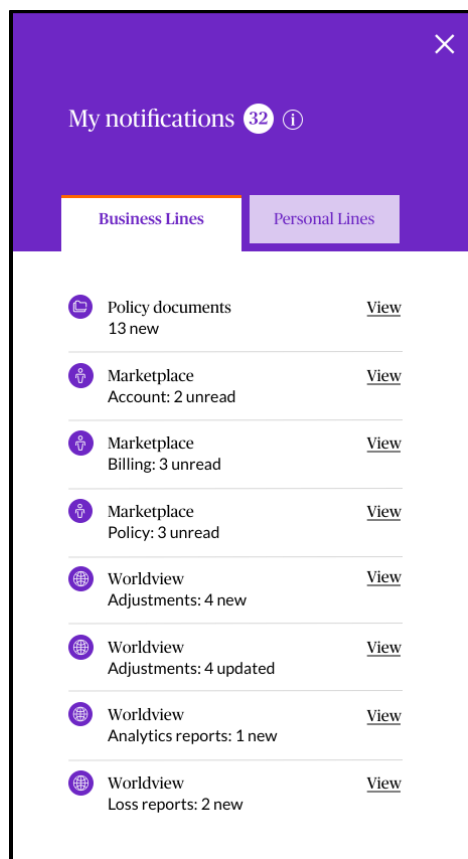


Notifications

The header contains another convenient way to access your notifications if you are not on the dashboard page. You'll see a total count of current alerts; click the bell  icon to expand the section.

The Policy Document alert will always be shown, even if no alerts are currently available. The count will reflect new documents issued within the last 14 days. Simply click "View" next to the alert to navigate to the data in Business Policy Search.

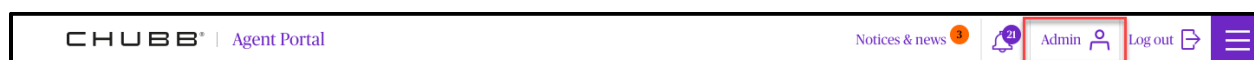
Marketplace and Worldview alerts will be shown only if there are alerts available. Click "View" next to any alert to seamlessly sign into the application and view the relevant data.



If you are also a Personal Lines agent, this icon and slide out will include a tab and count for Personal Lines “My Alerts” as well.


Admin

Click here to access the new Access Management Portal, the replacement of the EAS system.



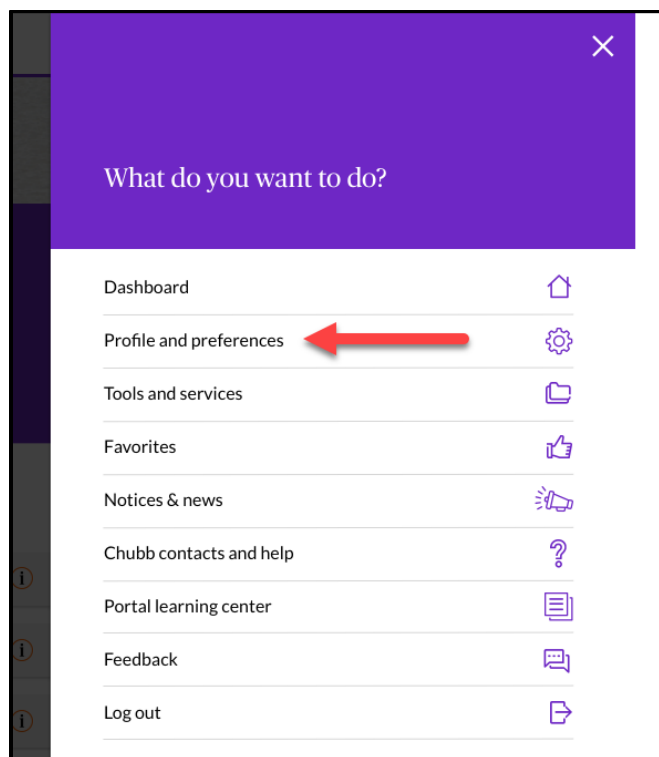
Burger Menu

Our new navigation, or burger, menu opens to quick links to return to your dashboard, update your profile, access the new ‘Portal learning center’ page, access tools and services quickly from other applications, and more.

Click the  icon to expand the menu.

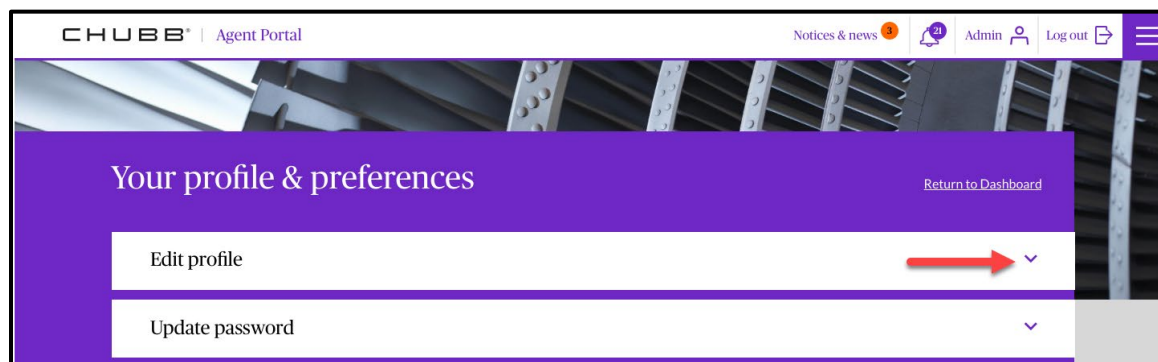
Profile and Preferences

To view or update profile information, or change your password, access the Profile and Preferences page from the burger menu:



Edit Profile

To edit your profile, click the down arrow on the edit profile section to expand the screen:



To make updates to your information, click in any text box. Once changes are made, the “Save Changes” button will enable. Click “Save Changes” to save or “Return to Dashboard” to return to the homepage.

Your profile & preferences [Return to Dashboard](#)

Edit profile

Here are the details we have for your profile. This information is used to improve our support efforts, pre-fill user information in other Chubb applications, and help drive targeted communications from Chubb.

First name Mike	Last name Smith
Street address line 7201 W Lake Mead #400	City Las Vegas
State/Province Nevada	Country United States
Email address mike@email.com	Phone number (555) 555-1234
Agency name ABC Corporation	Agency Title CSR
Producer License # (optional) 00099999-000	

[Cancel](#) [Save changes](#)

Update Password

To change your password, click the down arrow on the Update Password section to expand the screen:

CHUBB® | Agent Portal [Notices & news](#) [Admin](#) [Log out](#)

Your profile & preferences [Return to Dashboard](#)

Edit profile

Update password

From here, enter your current password followed by your new password, making sure you follow the guide. Confirm your new password by entering a second time and click “Save Changes.” If at any time you need to see what you entered, click the icon.

Update password

Fill out the form below to change your Agent Portal account password.

Current password

New password

Confirm new password

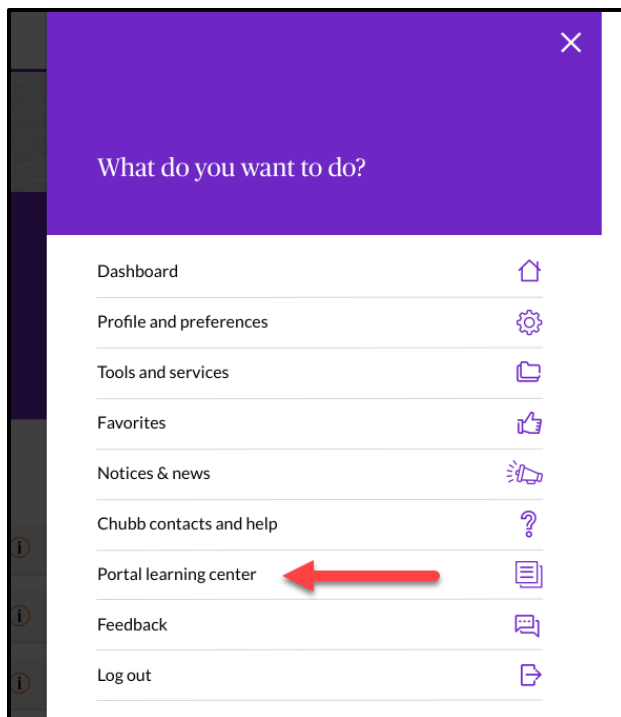
Cancel Save changes

Password Strength:

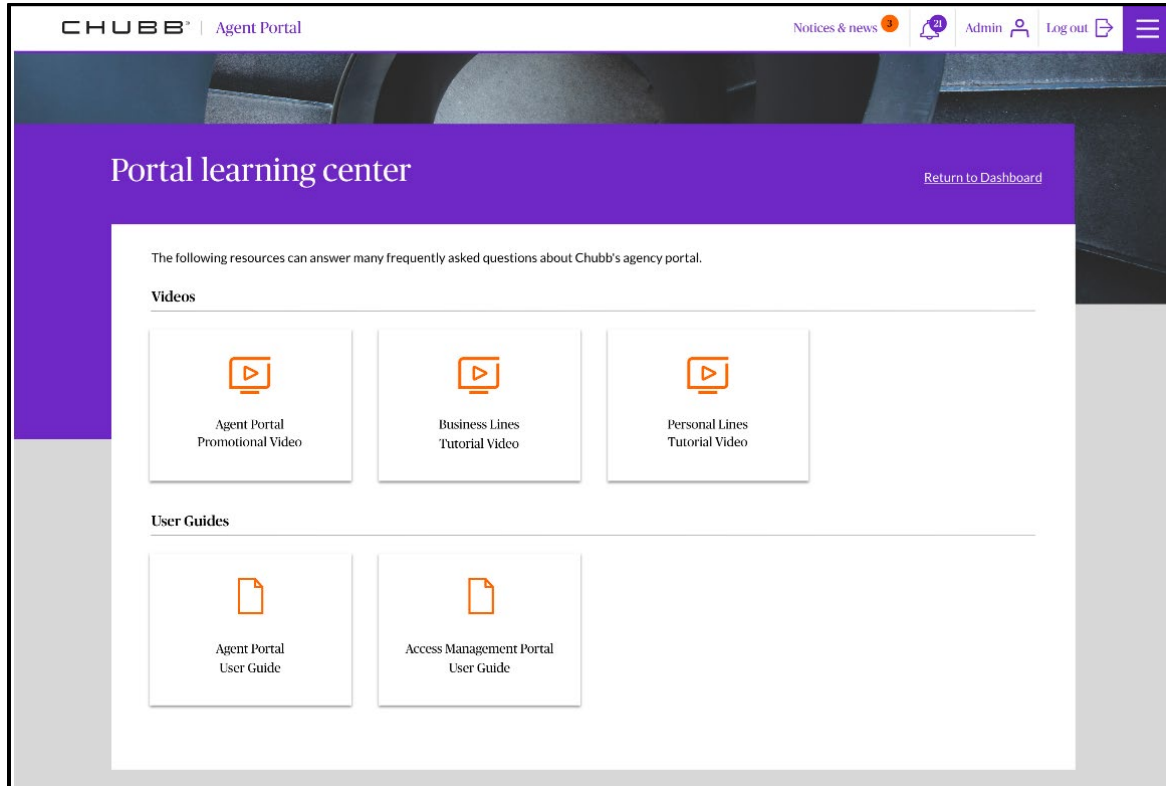
- Cannot match your User ID, First or Last name
- Minimum 8 characters
- Have at least 1 capital letter and 1 lower case letter
- Have at least 1 number

Portal Learning Center

The Portal Learning Center contains important information to help you navigate the new portal, including user guides and helpful videos. To access, simply click the link from the burger menu:



From here, click any link to view the content or click “Return to Dashboard” to go back to your homepage:



Chubb Contacts and Help

To access Chubb Contacts and Help, click the burger menu and choose “Chubb contacts and help.” By default, you’ll land on the Contacts tab. Select a product area and Location from the drop downs to view Chubb Contacts.

Chubb contacts and help

[Return to Dashboard](#)

Contacts

Help

Business Lines

For policy-specific contacts, use the Business Policy Search tool on the Dashboard to search for the policy by Account Name or Policy Number, then view the Contacts tab.

For general information on products, please select a Business Area/Product and Chubb Office Location below.

Business Area/Product
Commercial package

Chubb office location
Boston

Get results

Name	Role	Work phone	Cell phone	Email
Patti Dinsmore	Underwriter	(515) 635-6250	(515) 201-3020	pdinsmore@chubb.com

Personal Lines

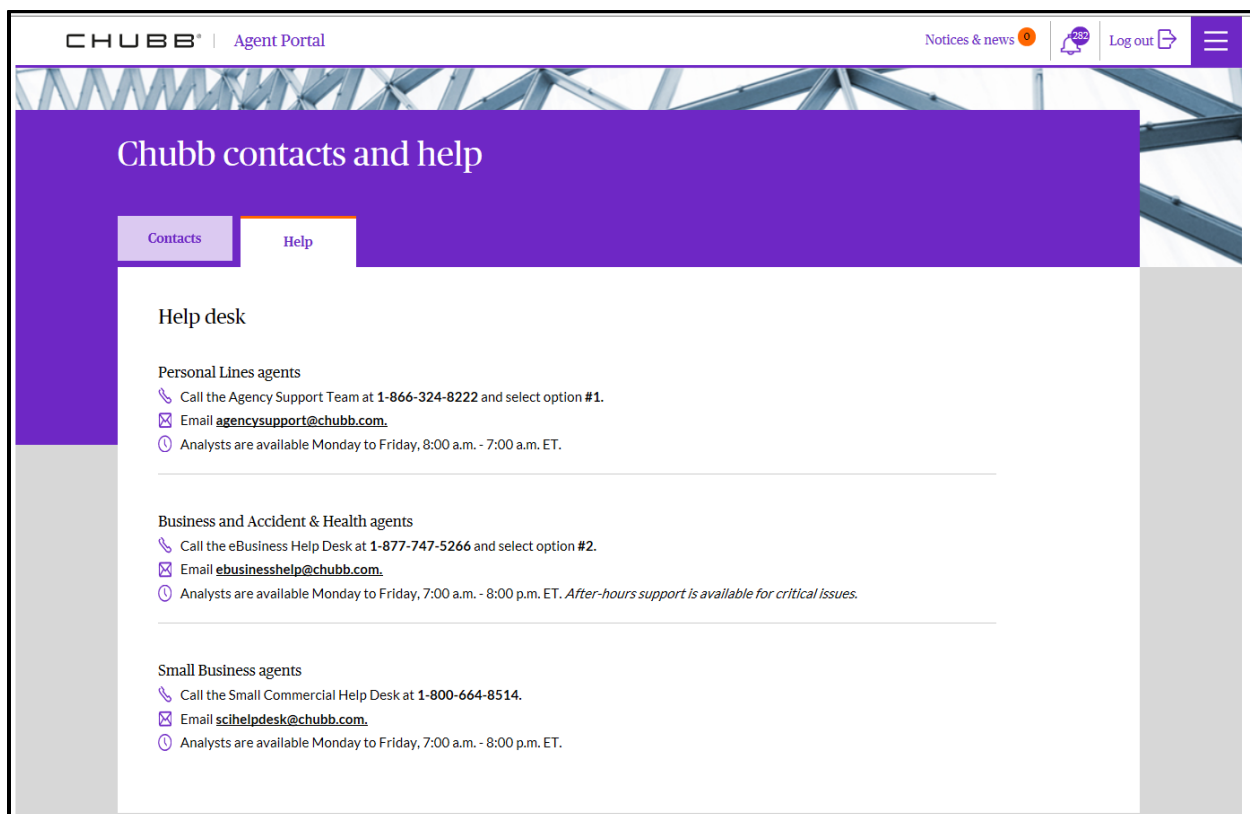
For policy-specific contacts, use the Client lookup tool on the Dashboard to search for the policy by Account Name or Policy Number, then view the Contacts tab.

For general information on products, please select a Product area below.

Product Area

Get results

To view Help Desk information, click the “Help” tab. Help Desk information can also be found at the bottom of your Dashboard page.



Feedback

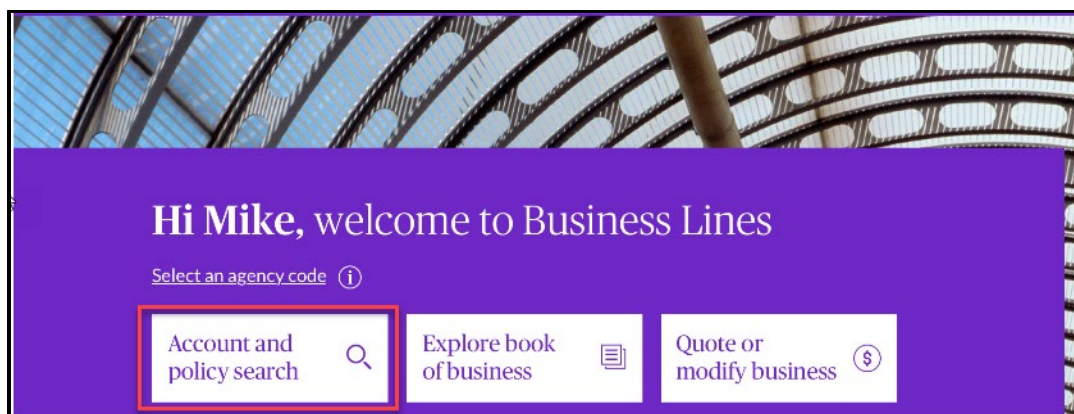
To access the Feedback feature, click the burger menu and choose “Feedback.” A new site will launch where you can enter your feedback and click submit.

Dashboard Features

The Dashboard provides several features including access to notifications, account and book of business searches, and quick access to applications to quote or modify business.

Account and Policy Search

To search for data by account name or policy number, click Account and Policy search. The search will return all available data for in-force business.



Drop downs will be pre-filled with data relevant to your agency and the agency codes to which you have access. Scroll to select or start typing to filter to specific data. Once you have selected your accounts or policy numbers, click “Go.” Results will be presented on the business policy search page, defaulted to the summary tab.

The screenshot shows the 'Account and policy search' section of the Chubb Agent Portal. The top navigation bar includes 'Account and policy search', 'Explore book of business', and 'Quote or modify business'. A message states: 'Did you know? Associating an agency code above will narrow down your account and policy lists.' The search area is titled 'Search or select an account or policy number' with a 'Close' link. Under 'Search by account', a dropdown menu is open, showing a list of accounts with checkboxes. The account 'Massive Dynamic' is selected. A 'Go' button is visible to the right of the dropdown. Below the search area, there is a 'Favorite applications' section with links to 'My Business Income', 'Chubb Cyber Index', 'Mid-Market Web App', and 'Mid-Market Resource Center'.

Account and policy search

Explore book of business

Quote or modify business

Did you know? Associating an agency code above will narrow down your account and policy lists.

Search or select an account or policy number

Close

Search by account

Select an account

M|

☐ Macmillan & Allen Company

☐ Marshall Grange & Supply Company

☐ Masrani Corporation

☐ McMillanville Tractor & Implement

☒ Massive Dynamic

☐ Minnesota Metallurgy & Mining Company

☐ Mount Massive Enterprise

☐ Murkoff Corporation

Go

Favorite applications

Manage

My Business Income

Chubb Cyber Index

Mid-Market Web App

Mid-Market Resource Center

The screenshot shows the 'Policy number' search section of the Chubb Agent Portal. The top navigation bar is the same as the previous screenshot. The search area is titled 'Search or select an account or policy number' with a 'Close' link. Under 'Search by policy number', a dropdown menu is open, showing a list of policy numbers. The policy number 'A12' is entered in the search field. A 'Go' button is visible to the right of the dropdown. Below the search area, there is a 'Favorite applications' section with links to 'My Business Income', 'Chubb Cyber Index', 'Mid-Market', and 'Mid-Market'.

Account and policy search

Explore book of business

Quote or modify business

Did you know? Associating an agency code above will narrow down your account and policy lists.

Search or select an account or policy number

Close

Search by account

Search by policy number

Policy number

A12|

A12391121

A12491122

A12491123

A12691124

A12691125

A12891129

Go

Favorite applications

Manage

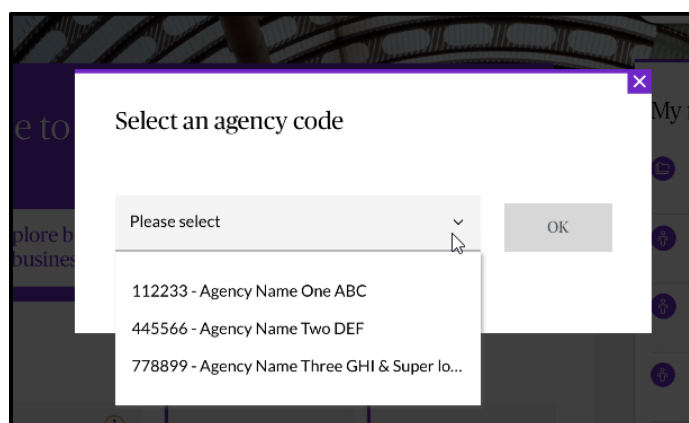
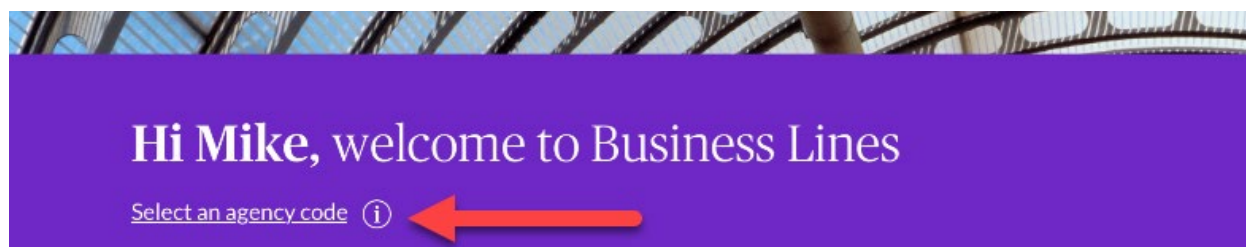
My Business Income

Chubb Cyber Index

Mid-Market

Mid-Market

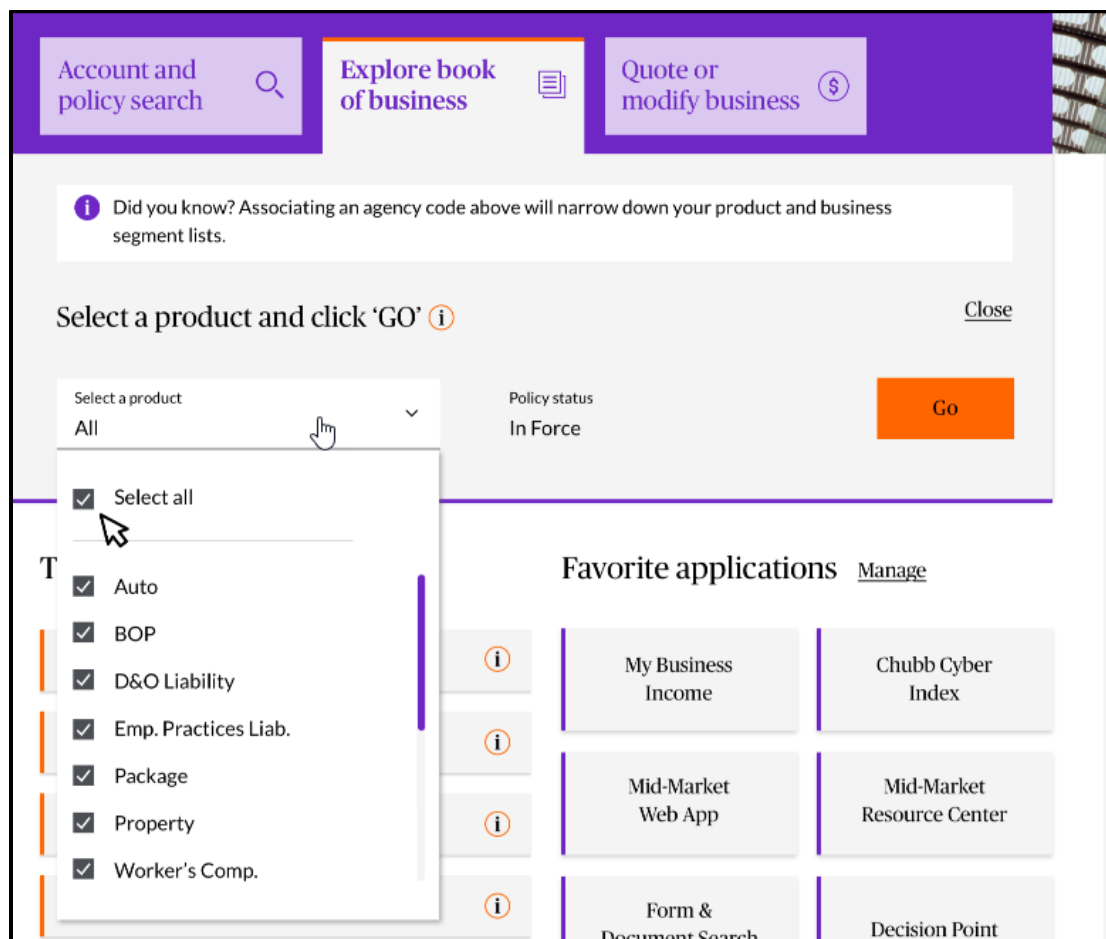
If you'd like to limit your data to a specific agency code, use the select an agency code feature to select a code from the drop down and click "OK". This will update your account and policy number drop downs to reflect only policies associated to that producer code.



Explore Book of Business

If you'd like to do a broader search of in-force business, click the Explore book of business tab to select all or specific products. This drop down will be pre-populated based on the business your agency writes with Chubb and the agency codes you have access to.

Once you have selected your search criteria, click go. Results will be presented on the business policy search page, defaulted to the summary tab.



If you'd like to limit your data to a specific agency code, use the select an agency code feature to select a code from the drop down and click "OK". This will update your account and policy number drop downs to reflect only data for that code.

Business Policy Search Results

Once you have selected your search criteria from the Account and Policy or Book of Business tabs and click "Go", you will land on the Summary Tab. On the Summary tab, you can further refine your search results by using the sort and filter options or choose to export this data into an Excel file. In the top right, you will see what your search criteria included. Click "edit" to amend your search.

Business policy search

Search criteria: Products: All Edit

Don't see all of your accounts or policies? [Learn more.](#) Who should you call? [Find out here.](#)



Summary Documents Billing Claims Contacts

Account	Policy #	Product	Policy eff.	Policy exp.	Prod. code
ACME CORPORATION	H12345678	Property	06/01/19	06/01/20	X48216
MASSIVE DYNAMIC	H85493482	Worker's Comp.	07/15/19	07/15/20	X48216
INTERNATIONAL GENETICS AND TECH...	H476874345	Auto	07/15/19	07/15/20	X48216
GLOBEX CORPORATION	H578234987	BOP	06/01/19	06/01/20	KL9342
HOOLI	H346365645	Auto	05/01/19	05/01/20	KL9342
WAYNE ENTERPRISES	H34536757	Package	06/01/20	06/01/21	KL9342
WALLACE CORPORATION	H23432342	Property	06/01/20	06/01/21	P32943
LA COLOMBINA CORP	H53987234	D&O Liability	06/01/20	06/01/21	P32943
TYRELL CORPORATION	H23432897	Emp. Practices Liab.	06/01/20	06/01/21	P32943
TURNPIKE INDUSTRIES	H45523464	Worker's Comp.	06/01/20	06/01/21	P32943


Rows per page: 10 Showing 1 to 10 of 364 Page 1 of 37

Export to Excel


Click the “Documents” tab to view documents for your search criteria that are available digitally. Currently, this includes policies and endorsements from Policy View and Worldview. You can further refine your search results by using the sort and filter options. You can also export this data into excel.

To download a document within Chubb Agent Portal, click the  button. To view the document in the source system, click the  icon.





















Note: Based on your access level and roles, some documents may not be able to be accessed in the source system. If you are trying to access a document in Worldview and receive a “Restricted Access” message, please contact worldview@chubb.com to be provisioned access to that information.

Business policy search 

Search criteria: **Products: All** [Edit](#)


 Don't see all of your accounts or policies? [Learn more.](#) Who should you call? [Find out here.](#)

Summary Documents Billing Claims Contacts


Added	Account	Policy #	Product	Policy eff.	Policy exp.	Transaction	Actions
06/01/19	ACME CORPORATION	012345678	Property	06/01/19	06/01/20	Policy	 
07/01/19	MASSIVE DYNAMIC	H85493482	Worker's Comp.	07/15/19	07/15/20	Endorsement	 
04/01/19	INTERNATIONAL GEN...	1476874345	Auto	07/15/19	07/15/20	Policy	 
06/01/19	GLOBEX CORPORATION	1578234987	BOP	06/01/19	06/01/20	Policy	 
06/01/20	HOOLI	1346365645	Auto	05/01/19	05/01/20	Policy	 
07/01/20	WAYNE ENTERPRISES	134536757	Package	06/01/20	06/01/21	Endorsement	 
05/01/20	WALLACE	123432342	Property	06/01/20	06/01/21	Policy	 
07/01/20	LA COLOMBINA	153987234	D&O Liability	06/01/20	06/01/21	Endorsement	 
06/01/20	TYRELL CORPORATION	123432897	Emp. Practices L...	06/01/20	06/01/21	Policy	 
07/01/20	TURNPIKE INDUSTRIES	145523464	Worker's Comp.	06/01/20	06/01/21	Policy	 

Rows per page: 10 Showing 1 to 10 of 38 Page 1 of 4 [Export to Excel](#)

The billing and claims tabs include links to applications that contain this data. Over time the portal will be enhanced to incorporate detailed billing and claims information like the policy information provided on the documents tab.


Business policy search 

Search criteria: **Products: All** [Edit](#)


 Don't see all of your accounts or policies? [Learn more.](#) Who should you call? [Find out here.](#)

Summary Documents **Billing** Claims Contacts


We are working to incorporate detailed billing information into the Business Policy Search tool. To access billing information, select one of the applications below.



Commercial
Direct Bill System



Marketplace



Worldview

Business policy search

Search criteria: **Products: All** [Edit](#)

Don't see all of your accounts or policies? [Learn more.](#) Who should you call? [Find out here.](#)

Summary Documents Billing **Claims** Contacts

We are working to incorporate detailed claims information into the Business Policy Search tool. To access claims information, select one of the applications below.

Business Loss Runs
 ClaimView
 CheckView

Click the “Contacts” tab to find Underwriter, Marketing Manager, and Branch Manager contact information by Account and Product. Click the icon to open an email in your default email application pre-filled with the email address. Or, use the icon to copy the email address to you clip board and paste into a new email.

Business policy search

Search criteria: **Products: All** [Edit](#)

Don't see all of your accounts or policies? [Learn more.](#) Who should you call? [Find out here.](#)

Summary Documents Billing Claims **Contacts**

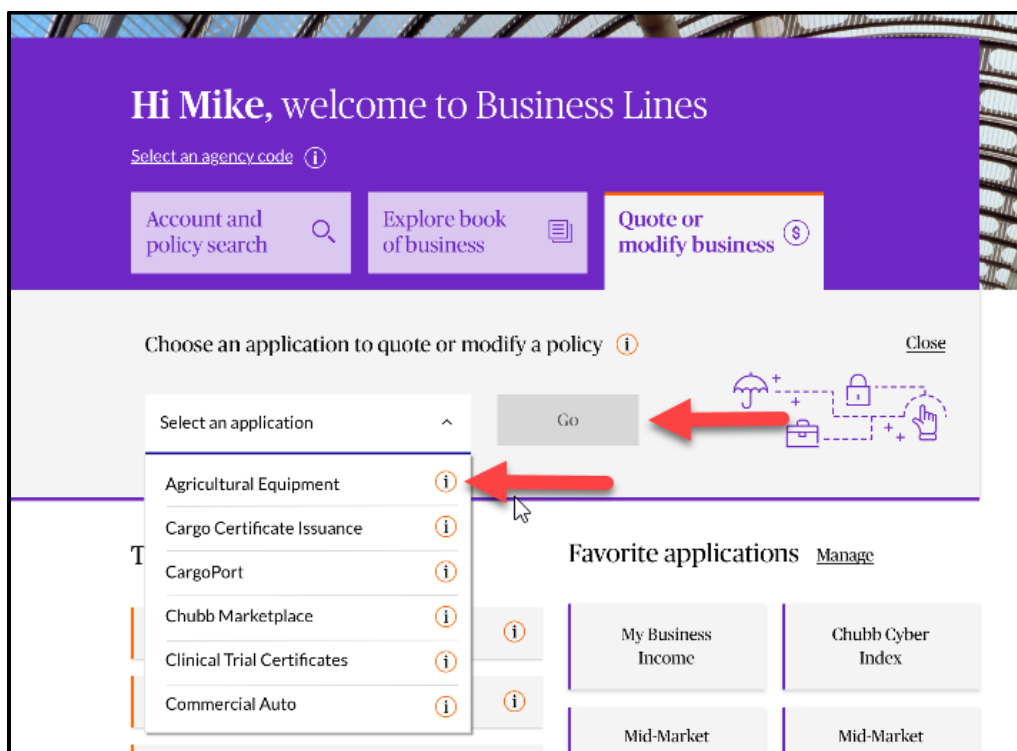
Account	Product	Name	Title/role	Contact information
ACME CORPORATION	Property	Simon Masrani	Underwriter	(212) 543-2435
MASSIVE DYNAMIC	Worker's Compensation	Nina Sharp	Marketing Mana...	(212) 463-2234
INTERNATIONAL GENETICS AN...	Auto	John Hammond	Branch Manager	(434) 234-6475
GLOBEX CORPORATION	BOP	Obadiah Stane	Underwriter	(121) 342-3423
HOOLI	Auto	Hideo Yutani	Marketing Mana...	(232) 234-3423
WAYNE ENTERPRISES	Package	William Earle	Marketing Mana...	(888) 842-4534
WALLACE CORPORATION	Property	Niander Wallace	Branch Manager	(555) 123-4567
LA COLOMBINA CORP	D&O Liability	Peter Weyland	Underwriter	(555) 123-4567
TYRELL CORPORATION	Emp. Practices Liab.	Eldon Tyrell	Underwriter	(555) 123-4567
OSCORP INDUSTRIES	Worker's Comp.	Charles Standish	Underwriter	(555) 123-4567

Rows per page: 10 Showing 1 to 10 of 38 Page 1 of 4 < >

Quote or Modify Business

To quickly access applications to quote or modify business, click on Quote or modify business tab. The drop down will be prefilled with applications relevant to your agency and access. Simply select the application you'd like to navigate to and click go. Navigation to these applications will be seamless; you will not need to utilize a second login or separate user ID.

Click the icon next to any application to view a short description.




Notifications

The Dashboard Notifications section provides a convenient way to access your notifications for new policy documents as well as alerts from Marketplace and Worldview.

The Policy Document alert will always be shown, even if no alerts are currently available. The count will reflect new documents issued within the last 14 days. Simply click “View” next to the alert to navigate to the data in Business Policy Search.

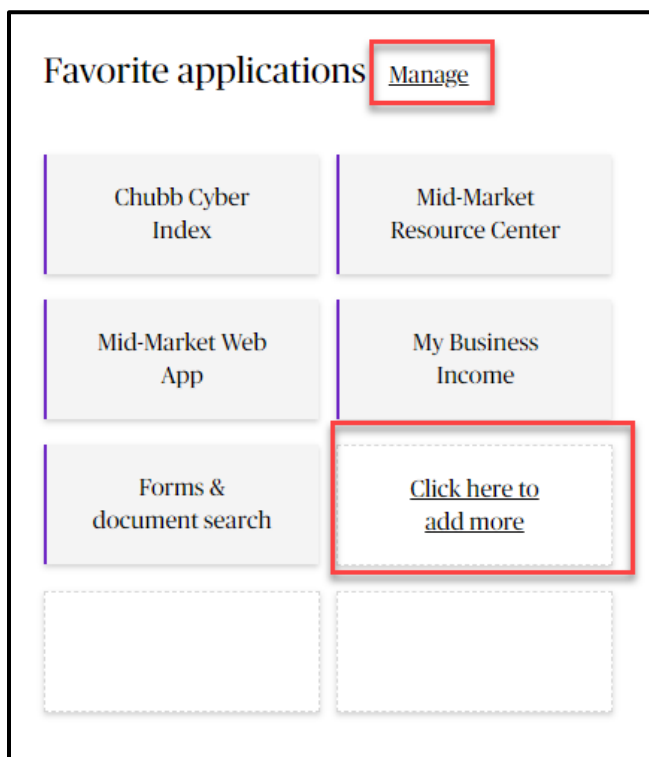
Marketplace and Worldview alerts will be shown only if there are alerts available. Click “View” next to any alert to single sign on into the application and view the relevant data.




Tools and Services

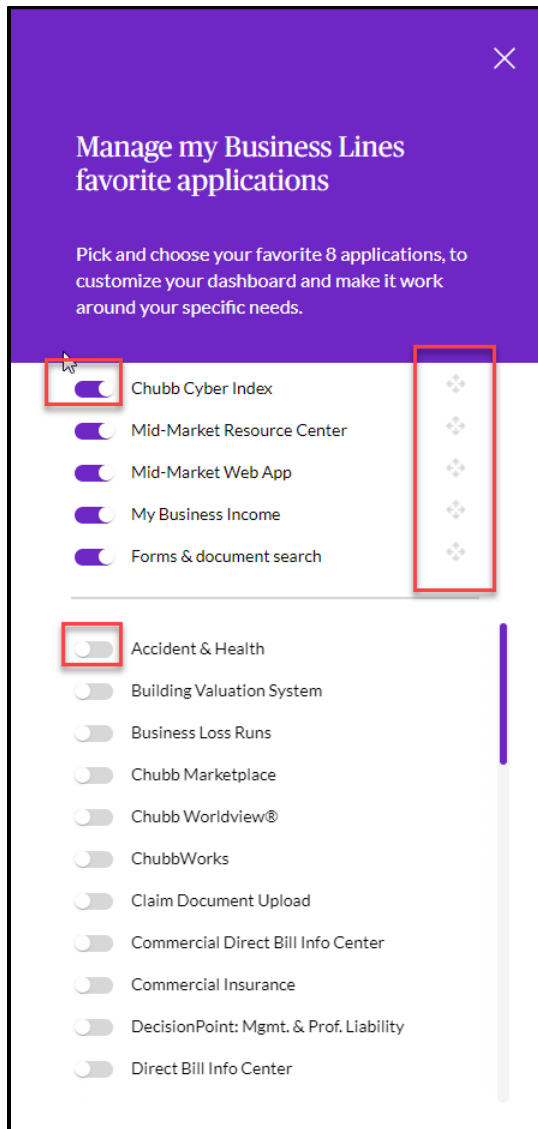
The Tools and Services section of the main dashboard contains links to all available applications and tools. Click any individual application to launch or click any boxes with a  to expand and view all available applications under that header. Then click any application to launch. Tool tips on each application will give a short description of what it does or includes. Navigation to most applications will be seamless; you will not need to utilize a second login or separate user ID.

Manage Favorites

If there are applications you use frequently, you can save them by utilizing the favorite applications section of the page. You can choose up to 8 applications and create an order of your choosing. This application list can be edited at any time. If you have not selected any favorites as part of your first time login, a few default applications will be selected for you.



To edit your favorite list, click on “Manage” or “Click here to add more.” Use the  and  icons to toggle applications on or off; drag the  icon to move selected applications up or down in your list.



Marketing Content and Help

To access Marketing and Product information, or to quickly find help desk contact information, scroll to the bottom of your Dashboard page. Click any content to launch.

