

CHUBB®

Discover the Chubb Agent Portal
for Personal Lines



The Chubb Agent Portal:

Centralized, Personalized, Revolutionized. For Personal Lines agents, Chubb Agent Portal provides a personalized homepage; a seamless way to view all your business; and convenient access to all of your Chubb applications.

We are proud to provide a wide variety of complementary digital solutions that allow your agency or brokerage to service your clients better, faster, and more efficiently. We are continuously investing in technology to deliver solutions for your most frequent requests: real-time transaction processing and 24/7 access to policy, claims and billing information. Our portal can interface with third-party agency management systems to allow you to manage information across different carriers in one central location.

Personalized Homepage Tools



Client Look-Up

The client dashboard provides policy, billing, claims, and assessment information for the policies in a client's household. You can also generate Proof of Insurance, access Insurance ID cards, upload documents, create a Client Portal account, and pay a bill on behalf of the client.



Endorse a Policy/Retrieve a Quote

Enter the policy/quote number or client name, and you'll be directed to the appropriate system to make changes.



Start a New Quote

Select the line(s) of business you'd like to quote, and you'll be directed to the appropriate system to process your quote — seamlessly!



My Alerts

View customized key account notifications directly from your homepage.

Available Applications:

Quote, Bind, and Modify Business

Application	Description
Group Personal Excess	Submit a new application, manage enrollment for New Lines, Renewals and Endorsements, and retrieve Certificates of Insurance.
Individual Travel Accident (Passport 360/Travel 365)	Create individual travel accident quotes for new lines and endorsements.
Masterpiece EZ Quote	Create quote(s) and modify policies in our new, easy to use application.
Masterpiece Real-Time	Create Masterpiece quotes for new lines and endorsements.
ORCA	Obtain real-time quotes for Recreational Marine insurance with the ability to bind and issue 24/7.
PLS	Create Platinum Portfolio quotes for new lines and endorsements.

Account Servicing Solutions

Application	Description
Client Catastrophe Tracker	View a snapshot of major catastrophes along with client locations.
Client Lookup	The Client Lookup's client dashboard provides policy, billing, claims, and assessment information for the policies in a client's household. You can also generate Proof of Insurance, access insurance ID cards, upload documents, create a Client Portal account, and pay a bill on behalf of the client.
Report a Loss*	Submit a loss while on the phone with a client and immediately provide them with a claims reference number which automatically cedes into your agency management system for future reference.

Sales Support Solutions

Application	Description
Agent Marketing Center	All Chubb Personal Risk Services marketing materials together in one place.
Cross-sell Admin	Select individuals within your agency or brokerage can choose to provide your clients the ability to purchase some coverages directly.
My Resources	A library of reference materials including Contact List, System Announcements, Marketing, Forms & Letters, State Information, and Systems & Training Information.
Portal Learning Center	Access training videos and user guides.

Available Applications:

Agency Management Solutions

Application	Description
Agency Billing Statements	Access monthly agency billing statements for agency billed policies. View billing summary information or view and print monthly statements.
Direct Deposit of Commissions	Access to enroll agency codes in direct deposit for receipt of direct bill commission payments via electronic funds transfer (ACH).
Direct Bill Commission Statements	Access monthly direct bill commission statements for direct billed policies. View commission summary information or view and print monthly statements.
Resend Policy Downloads	Request download resends, review recent download transactions, and more.

Claims & Risk Management Solutions

Application	Description
ClaimView*	Provide your clients with detailed information about their claim status within 24 hours of an update, including certain adjuster notes. The check inquiry feature allows you to view detailed claim check payment information on third-party liability and first-party claims within 24 hours of the claim check issuance.
Locate a Chubb Claim Vendor	Provides access to pre-approved home and auto service providers.
Report a Claim	Chubb's online claim reporting application provides a simple, easy-to-use online solution.

*This solution is also available in real-time via some agency management systems.

Download & Upload Solutions

Solution	Description
Claims Download	Daily downloads of your claims details will keep you on top of your customers' claims activities, including first notice of loss and claims status updates (Applied only).
Claims Activity and Notes	Works with Transact Now for updates every two hours (Vertafore only).
Direct Bill Commission Download	Update your agency management system with your Monthly Commission Statements, allowing you to reconcile your agency records with Chubb's quickly and easily.
Personal Lines Policy Download	Populate your agency management system with the latest detail within two days of when a transaction is issued.
Rate Request (Applied) and Quote Request (Vertafore)*	Also known as Upload and available for Homes and Auto, this capability enables you to have policy information from your Applied or Vertafore agency management system bridged directly into Masterpiece® Real-Time.

* This solution is also available in real-time via some agency management systems.

Click below for Enrollment Request Form:

[Personal Lines Enrollment Form](#)

Available Applications:

Administrative Solutions	
Application	Description
Access Management Portal	The reimagined Access Management Portal provides a fast and easy way for Agency Administrators to create and manage users. The agency or brokerage designates an Agency Administrator (through their local Chubb representative), who then has the authority to create, edit, and revoke user IDs and passwords for its employees.
Find Agency Administrator	Located on the Help tab in the burger menu Chubb contacts and help, this feature allows users to quickly find an Agency Administrator to contact to request access to additional tools, services, or agency codes in the Agent Portal.
Forgot User ID	Located under the login box, this application allows users to quickly receive their forgotten or misplaced user ID via email.
Forgot Your Password	Located under the login box, this application allows users to quickly reset their locked or forgotten passwords via email.

Additional solutions are also available.

For more information or if you would like information on how to enroll on @chubb, contact the help desk:

Personal and Accident & Health agents, please contact Agency Support at 1.866.324.8222, option #1, or send an email to agencysupport@chubb.com

Contact

Rebecca Gough
Vice President
Digital Agent Experience
Chubb N.A. Field Operations
Chubbagentportal@chubb.com

CHUBB®

About Chubb

Chubb is the world's largest publicly traded P&C insurance company and the largest commercial insurer in the U.S. With operations in 54 countries and territories, Chubb provides commercial and personal property and casualty insurance, personal accident and supplemental health insurance, reinsurance and life insurance to a diverse group of clients. Chubb Limited, the parent company of Chubb, is listed on the New York Stock Exchange (NYSE: CB) and is a component of the S&P 500 index.

Chubb is the marketing name used to refer to subsidiaries of Chubb Limited providing insurance and related services. For a list of these subsidiaries, please visit our website at www.chubb.com. Insurance is provided by ACE American Insurance Company and its U.S.-based Chubb underwriting company affiliates.

All products may not be available in all states. This communication contains product summaries only. Coverage is subject to the language of the policies as actually issued. Surplus lines insurance sold only through licensed surplus lines producers.

Chubb, 202 Halls Mill Road, Whitehouse Station, NJ 08889-1600

Chubb. Insured.SM