

**Welcome to the Beacon Hill Agent Portal!** We have designed this portal to give our agents real time access to the business they transact with Beacon Hill, and to provide an unprecedented level of transparency into what is happening with your accounts. Inside the portal you will be able to review current submissions (along with the results of marketing efforts), see upcoming renewals, request service, and review historic business written. You will be able to request and access loss runs, policy documents, and prior year applications to name just a few features. We hope it will further enhance our relationship with your team.

Using the portal is easy. The first step is making sure your agency has an updated Producer Agreement with Portal Addendum. If you do not, please let us know and we will get one to you right away.

We will then need an "Administrator" level person for the agency. The Admin level contact will be able to see all of the agency's accounts, and have the ability to assign user rights to all personnel within the agency. It is very important that a member of your team has the ability to activate, and inactivate, users as needed.

With that, we are pleased to provide the following user instructions for the portal.

---

## Agent Portal Overview

### Compatibility

The Beacon Hill Associates Agent Portal is optimized for the last two iterations of all major browsers.

### Logging in

The portal can be reached by going to our web site ([www.b-h-a.com](http://www.b-h-a.com)) and clicking on the agent portal link at the top, or by going to

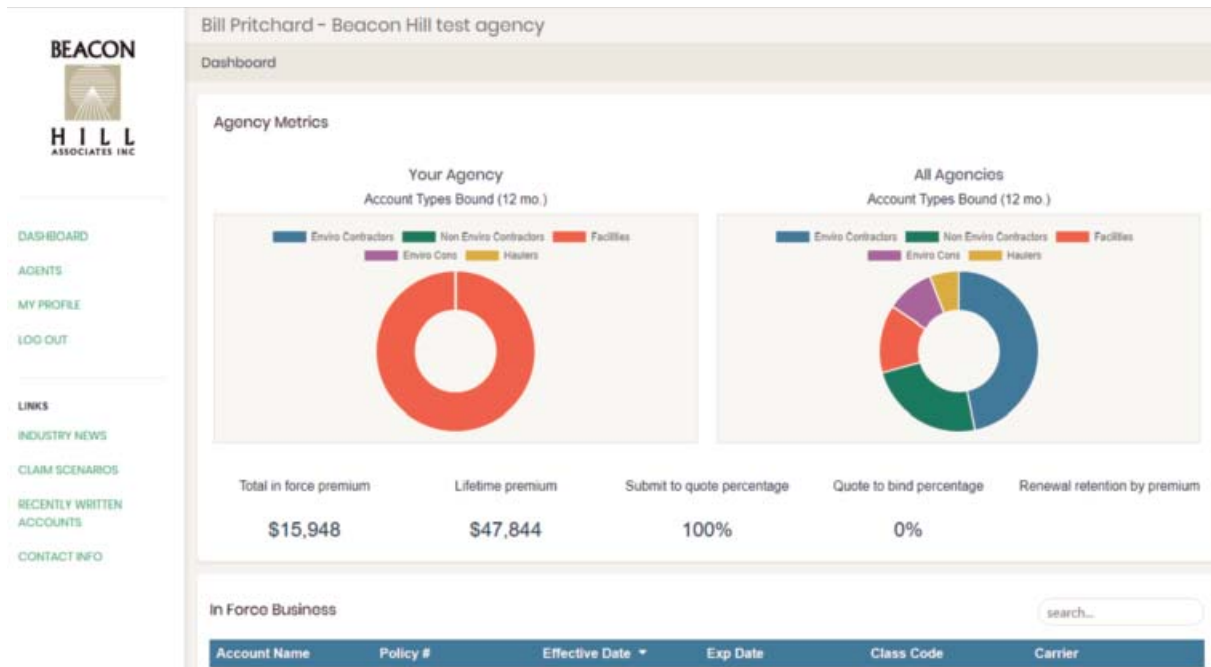
<https://portal.b-h-a.com/>

The Admin will have their username (email address) and password provided. Additional users that are activated by the Admin will receive their credentials via email.

On the first log in, you will be asked to reset your password.

Upon acceptance of credentials, you will see a legal disclaimer that needs to be agreed to by clicking the appropriate box. Once done, you will be in the Portal Dashboard.

## How the Beacon Hill Portal Works



### The portal is broken into the following parts:

- Sidebar
  - Dashboard link – brings you back to dashboard
  - Agents – This is only visible to the Admin, and take you to the list of agents Beacon Hill has on record for the agency
  - My Profile – Provides details for your profile
  - Log out
  - Links – These are links to other tools on our website and will open in a new tab of your browser.
- Dashboard
  - Agency Metrics
  - In Force Business
  - Pending New Business Submissions
  - Upcoming Renewals
  - Historic Business
  - Missed Opportunities
- The portal is designed for individual agents to access. There are three levels of permissions for an agency:
  - User: Can only see the accounts where they are listed as a contact in Beacon Hill's system.
  - Service: Can see all agency records, but cannot modify permissions, add users, etc. Designed to allow service person to order loss runs on accounts, etc.
  - Admin: Can see all agency accounts, add users, and modify other permissions.

## Sidebar - Agents

### Adding a staff member

- As an Admin, you will see a link labeled "Agents" in the sidebar. Click on this.
- This will take you to a list of your company's agents that Beacon Hill has in our system.
- If you click on a person's name, it will take you to their details page.
  - You can go through this information to set the person's "role"
    - User: Can only see their accounts
    - Service: Can see all accounts but cannot edit users
    - Admin: Can see all accounts, and can edit users
  - Once a role has been set, press "Activate Account." This will send an email to the party with instructions for logging in the first time.
  - If a user already has a password, it will say "Reset Password" and will send the user an email instructing them on how to reset their password.
- If you do not see an employee you want to add, click on the "+ Add New Agent" button at the top of the agent list.
  - This takes you to a detailed view where you can complete the agent information.
  - Click "Create" at the bottom, and login credentials will be sent to the indicated email address.

## Portal Dashboard Sections

### Agency Metrics

- This section shows key metrics for the entire agency over a rolling 12-month period.
- These are updated once a day
- The graphs show the classes of business bound with your agency along with the classes of business Beacon Hill has bound with all agents over the rolling 12-month period.

### In-Force Business

- Lists all in force accounts where the logged in user is listed in Beacon Hill's system as being attached to the account.
  - If the logged in user is an Admin, they see all accounts for their agency.
  - User can sort based on column listed by clicking on the titles in the header
- Detail view (clicking on the name of a specific account)
  - Account details at top: These are specifics from our system, including effective and expiration dates, policy number, etc.
  - Buttons to request loss runs and to initiate a service request are in top right of section: These open e-mails addressed to the correct contacts.
  - Documents Section: This will list documents we place in the "Account Documents" section of our agency management system. It can include copies of quotes offered, binders, policy docs, completed apps, etc.
  - BHA Team: This pulls information on the Beacon Hill staff assigned to the account, including contact details.

## Pending New Business Submissions

- Lists all pending new business accounts where the logged in user is listed in Beacon Hill's system as being attached to the account.
  - If the logged in user is an Admin, they see all accounts for their agency.
  - User can sort based on column listed by clicking on the titles in the header
- Shows date received, target date for coverage, established quote by date, and the date the first quote was issued.
- A Market Summary section is provided to the right.
- Detail view (clicking on the name of a specific account)
  - Account details at top: These are specifics from our system, including coverage sought, date received, etc.
  - Documents Section: This will list documents we place in the "Account Documents" section of our agency management system. It can include copies of quotes offered, binders, policy docs, completed apps, etc.
  - Market Data
    - Shows status of responses from carriers we have marketed the account to.
    - When a carrier quotes, their name will appear.
- BHA Team: This pulls information on the Beacon Hill staff assigned to the account, including contact details.

## Upcoming Renewals

- Lists all upcoming renewal accounts where the logged in user is listed in Beacon Hill's system as being attached to the account.
  - If the logged in user is an Admin, they see all accounts for their agency.
  - User can sort based on column listed by clicking on the titles in the header
- Shows policy number, current effective and expiration dates, our assigned class code, and the current carrier.
- Detail view (clicking on the name of a specific account)
  - Account details at top: These are specifics from our system, including coverage sought, date apps to the agent, received back, and to the carrier etc.
  - Documents Section: This will list documents we place in the "Account Documents" section of our agency management system. It can include copies of quotes offered, binders, policy docs, completed apps, etc.
  - Market Data
    - Shows status of responses from carriers we have marketed the account to.
    - When a carrier quotes, their name will appear.
- BHA Team: This pulls information on the Beacon Hill staff assigned to the account, including contact details

## Historic Business

- Lists all business written which has expired where the logged in user is listed in Beacon Hill's system as being attached to the account.
  - If the logged in user is an Admin, they see all accounts for their agency.
  - User can sort based on column listed by clicking on the titles in the header
- Shows policy number, current effective and expiration dates, our assigned class code, and the current carrier.
- Detail view (clicking on the name of a specific account).
  - Account details at top
  - These are specifics from our system, including coverage term, limits, carrier, policy number, etc.
- Documents Section: This will list documents we place in the "Account Documents" section of our agency management system. It can include copies of quotes offered, binders, policy docs, completed apps, etc.

## Missed Opportunities

- Lists all business received, but never bound where the logged in user is listed in Beacon Hill's system as being attached to the account.
  - If the logged in user is an Admin, they see all accounts for their agency.
  - User can sort based on column listed by clicking on the titles in the header.
- Shows BHA account number, date received, and date our file was closed
- Detail view (clicking on the name of a specific account)
  - Account details at top: These are specifics from our system
  - Documents Section: This will list documents we place in the "Account Documents" section of our agency management system. It can include copies of quotes offered, binders, policy docs, completed apps, etc.

Please let us know if you have any questions on how the portal functions after reviewing this guide. We hope you will find this tool valuable at enhancing your experiences working with Beacon Hill Associates. For more information, please contact us at [info@b-h-a.com](mailto:info@b-h-a.com).