

Welcome to

CLAIMS PORTAL

This welcome pack provides guidance on how to log in and includes hints and tips for managing your Claims Portal account.

1. Logging into Live and Training
2. Managing your account
(including how to change your password)
3. Hints, tips and other information

1 Logging in

As an Administrator it is important for you to keep your Organisation Portal ID and Administrator User ID safe – without these you cannot log in.

It is strongly recommended that you create a second Administrator, so that your firm's account can still be administered in your absence.

Please Note: Do not share your Administrator User ID or Password, as it is a breach of the Claims Portal User Agreement to share credentials.

Your credentials will only allow you to access the Administrator's section. It is your responsibility to create users with Claim Handler profiles so that they can manage the claims in the Portal.

Please follow the steps below to access your Administrator account. The instructions below are the same for both Live and Training Accounts:

1. Enter the Admin User ID, provided in the registration email, into the **User** section.
2. Enter the password, provided in the second email, into the **Password** section.
3. Change the **Section** drop down box from Claims Portal to Administration and press the Login button (see below).

Section:

Login

[Cannot access your Administrator account?](#)

If you do not select **Administration** from the drop down list as above, your access to the Portal will be denied.

You will be required to change your password when you login to the site for the first time.

2 Managing your account

Claims Portal is a 'Self-service' service, therefore Administrators have the ability and responsibility for managing and maintaining all user access.

On our website you will find an Administrator user guide with information that may help you. Below are some commonly used sections:

- After you are Registered
- Create New Users
- Change/reset your password
- Update/change your organisation details
- Add a branch

Top Tip: Administrators are fully responsible for managing and maintaining all User accounts. This includes password resets, expiry dates and User details.

The expiry date on your Administrator account is automatically set to expire two years after the date of inception. It is your responsibility as Administrator to manage all expiry dates for your organisation and its Users. If you let the account expire you will be locked out of the account.

3 Useful information

- All Portal users must read and agree to the **Claims Portal User Agreement**. As Administrator it is your responsibility to make sure all Portal users within your organisation have read and adhere to the User Agreement.
- It is strongly recommended that a second Administrator User is created. To do this, log in to the Claims Portal as an Administrator and create a new Administrator User.
- Administrators are the only people within your organisation who have the ability to reset passwords. Helpdesk and Support Services cannot perform this function.
- Keep up to date with the latest news by signing up to the **Portal Newsletter**.
- Your User ID and your organisation's ID will be required when you contact us – please keep them safe as you will need them if you have to contact the Helpdesk.
- If your Claims Handlers need help creating a CNF please visit our **website** to guide them through the process.

