Colorado Special Districts
Property and Liability Pool

CSD Broker Portal Overview
As of January 2024

Access Member Information

Access Coverage Information

Access Billing Information

After logging in, you will select **CSD** as the client before landing on the main page that provides a quick overview of all coverage, along with the contact information for your clients. From this view, simply click on the policy number to directly access the coverage page. If you manage a large book of business, there is an option to export this information to an Excel spreadsheet by clicking on the three-dot icon located in the upper right corner.

On this main page, you can also find some reports available for use. To generate a report, select the report name, and await the completion of the process. Once the report is ready, you can export it to an Excel spreadsheet by clicking on the Excel icon in the upper right corner of the page.

In the upper right corner of the landing page, you will find options to navigate to different domains such as **Members**, **Policies** and **Billing** of the portal.

Home Members Policies Billing

If you need to find client specific information, such as address, FEIN, contacts, and safety grant information, go to **Members**, and follow these steps:

1. On the right side of the screen, locate the "**Name**" field
2. Type in the name of the client you are looking for. Note you do not need to enter the full name. In general, entering the first two words in the name would be sufficient for the system to locate the record
3. Click on the "**Search**" button
4. Search results will appear on the left side of the screen
5. Click on the name of the client you wish to view from the search results
6. This action will take you to the member page dedicated to the selected client

If you need to find coverage specific information, such as annual contributions, coverage schedules, coverage documents and certificates, go to **Policies**, and follow these steps:

1. On the right side of the screen, locate the "**Member**" field
2. Type in the name of the client you are looking for. Note you do not need to enter the full name. In general, entering the first two words in the name would be sufficient for the system to locate the record
3. Click on the "**Search**" button
4. Search results will appear on the left side of the screen
5. Click on the coverage year and the coverage you wish to view from the search results. For example, under the "**Rating Program**" column, the 2024 PL Rates indicates that this is a 2024 property and liability coverage
6. This action will take you to the coverage page dedicated to the selected client

In the **Policies** domain, **if you need to access existing certificate information**, click individual **Certificate Number**. On the next screen, select "**More**" located at the upper right corner, and choose **Forms and Mail Merge Letters**". On the next page, select PL Single Cert (<u>or WC depending on coverage</u>) and click on the download icon to the right.

If you need to access coverage schedules details, locate the coverage schedule first. For example, if you need access to general liability schedule, you first need to find General Liability on the Policies screen, then select "**All General Liability Exposures**" at the upper right corner of the section. On the next screen, select "**More**" located at the upper right corner, and choose "**Export to Excel**". That will download a general liability schedule spreadsheet.

If you need to download coverage documents, select "**More**" located at the upper right corner on the Policies domain page, and then choose "**Forms and Mail Merge Letters**". On the next screen, select the corresponding report template. For example, if you need to download a 2024 PL coverage document, you would use the template that is designed for the 2024 coverage year. Once you have located the correct template, click the download icon on the right. That will generate a coverage document for download.

If you need to find billing specific information, such as invoice and payment history, go to **Billing**, and follow these steps:

1. On the right side of the screen, locate the "**Member**" field
2. Type in the name of the client you are looking for. Note you do not need to enter the full name. In general, entering the first two words in the name would be sufficient for the system to locate the record
3. Click on the "**Search**" button
4. Search results will appear on the left side of the screen

5. The first column on the left is "**Transaction Date**". You may click it to have the system sort billing history in an ascending or descending order. Alternatively, you may enter a transaction date range on the right side of the screen to refine your search results
6. The "**Type**" column indicates the type of the transaction. A "**Bill**" means an invoice, and "**Payment**" means a payment that the CSD Pool has received and processed. For example, a $2,000 bill followed by a $2,000 payment for the same coverage number signals that the coverage has been paid in full
7. You may download billing history by selecting "**More**" at the upper right corner and choosing "**Export to Excel**"