CSR24 – Insured Portal Login Instructions

Contents

Accessing CSR24 – Insured Portal for the first time

1. To access the CSR24 Insured Portal via your browser (i.e. Microsoft Edge or Google Chrome),
   a. Type URL: http://nipgroup.com/portal

2. If you are accessing our CSR24 – Insured Portal for the first time, please click on the "**Create New Account**" button. Otherwise, enter your Username/email address and password.

3. You will need to enter your (a.) email address on file, (b.) your phone # on file, and (c.) an active policy in our system. Then click on the "**Create Account**" button. **Note: Please contact your Broker if you have any questions.**
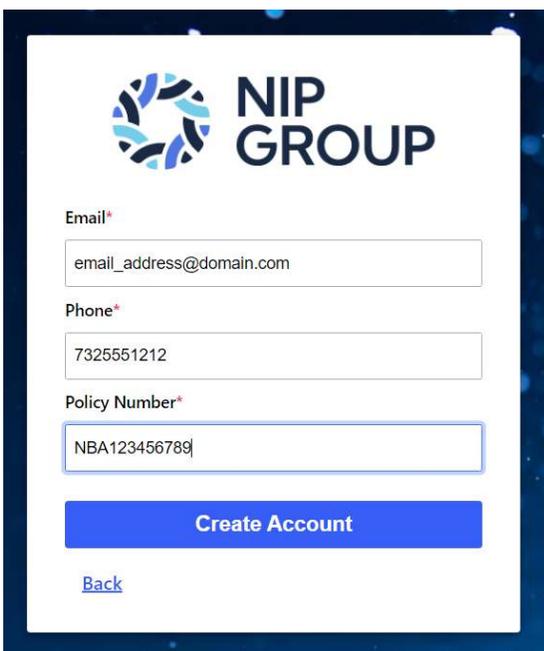
4. A verification code will be sent to your email address.
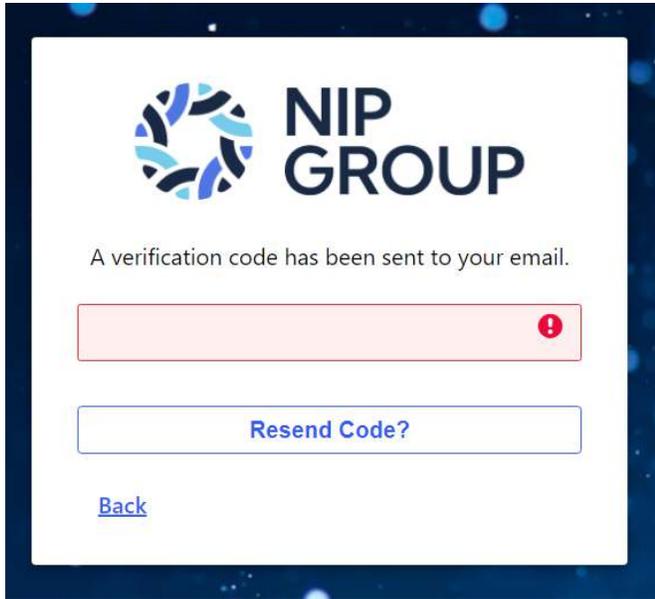
5. You will receive an email that looks like the below example.
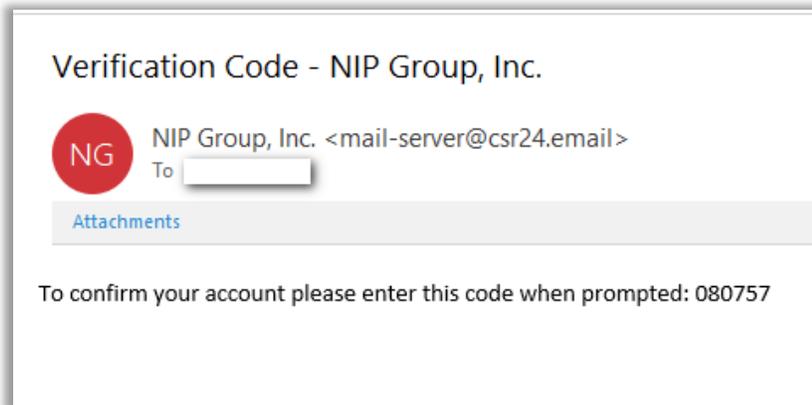
6. Enter the Verification Code in the space provided.
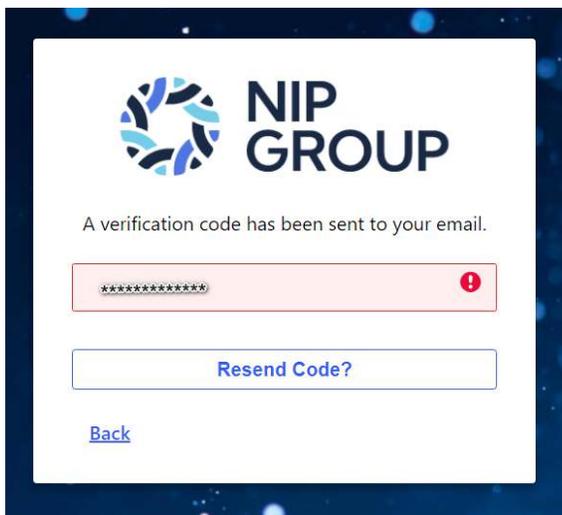
7. Enter your (a.) email address, (b.) login password, and (c.) confirm password. Then click on the "**Login**" button.
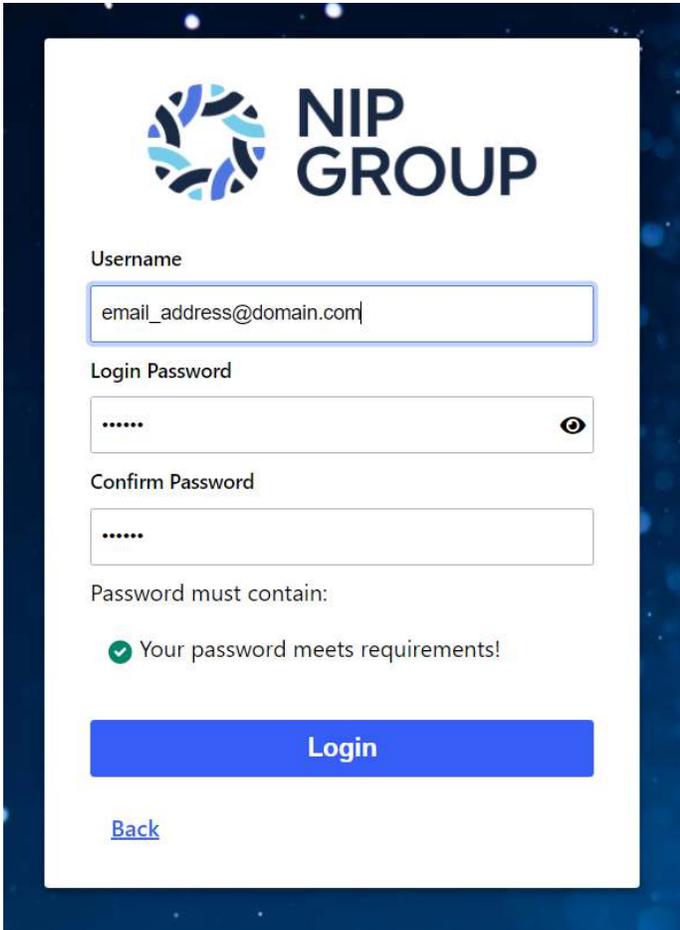
8. To continue, you must accept NIP Group's End User License Agreement (EULA) by clicking on the "**Accept**" button.

9. You will now be able to login to the CSR24 – Insured Login portal. Enter your (a.) email address and (b.) password. Then click on the "**Login**" button.
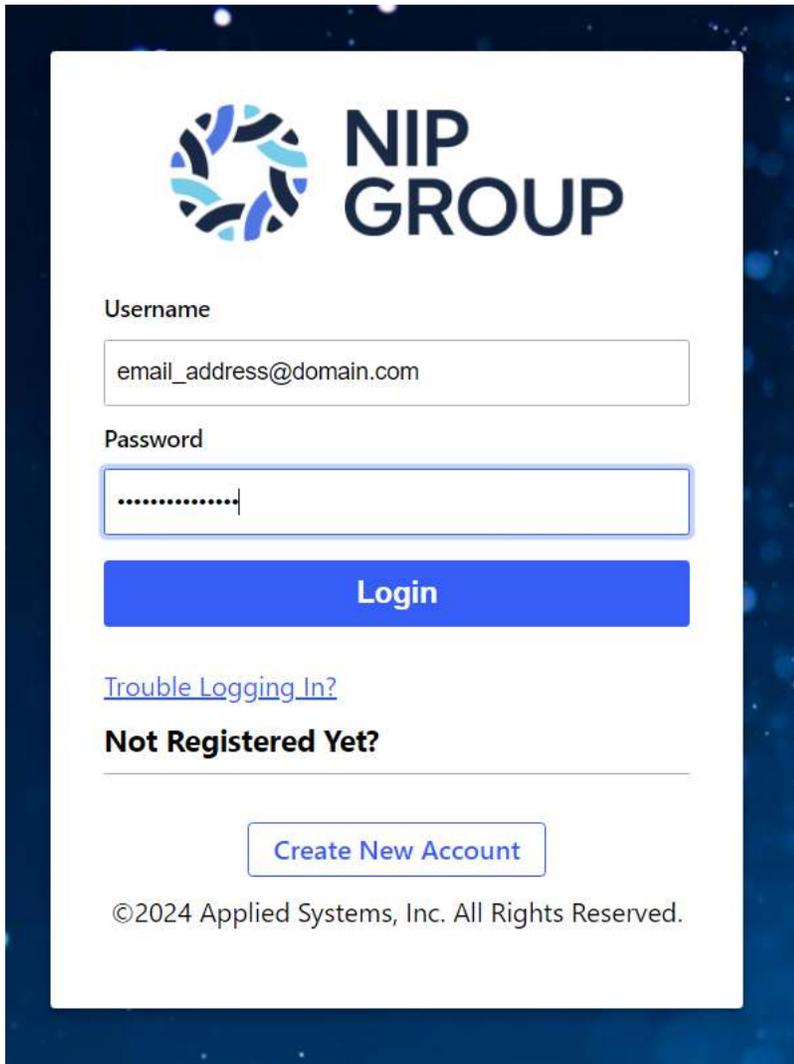
Layout of the CSR24 – Insured Portal Home Page
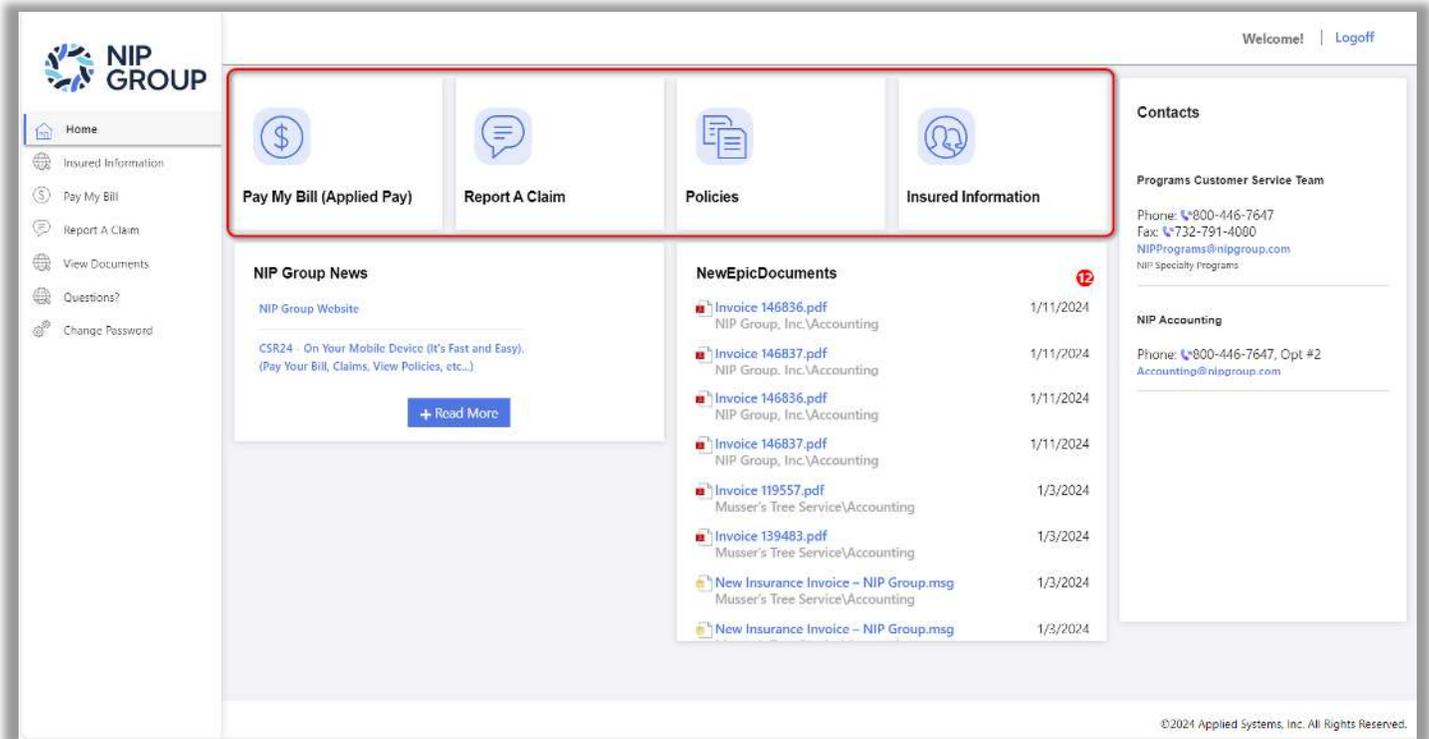
1. Once logged into CSR24 Insured Portal, you will come to the CSR24 Home Page. Notice the following areas.

   a. 4 Tile options (On Top):
      i. Pay My Bill (Applied Pay)
      ii. Report A Claim
      iii. Policies
      iv. Insured Information
   b. Menu choices (On the left-hand side)
      i. Insured Information
      ii. Pay My Bill
      iii. Report A Claim
      iv. View Documents
      v. Questions?
      vi. Change Password
   c. Contacts (On the right-hand side)
      i. Programs Customer Service
      ii. NIP Accounting
   d. NIP Group News
      i. Links to NIP Group Website
      ii. Company Notifications *
   e. New Epic Documents
      i. See documents (i.e. invoices, etc…)

CSR24 – Make A Payment

1. To make a payment, click on "**Pay My Bill (Applied Pay)**" on the 1st Tile, or left hand-side.
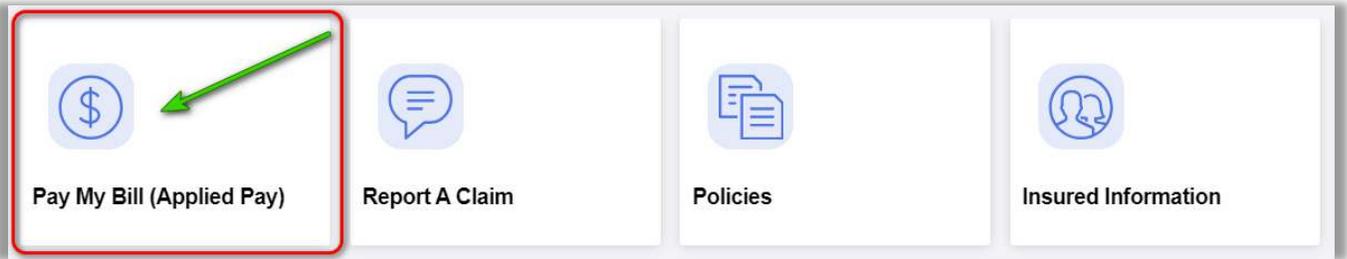
2. The screen will default to "**Policy Balances Due**".
    a. Click "Pay This Item" (checkbox) for Payment Amount to show (on right-side). Then click on "**Submit**" button.
    b. Otherwise, if you want to View By Invoice, click on "**View By Invoice**" button.
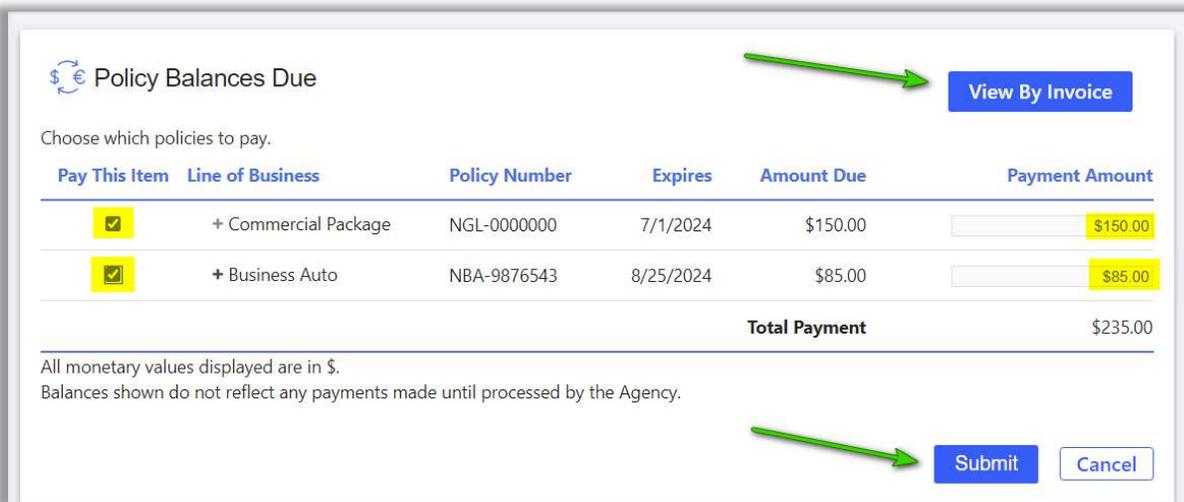
3. The screen will now display "**Invoice Balances Due**"
    a. Click "Pay This Item" (checkbox) for Payment Amount to show (on right-side). Then click on "**Submit**" button.
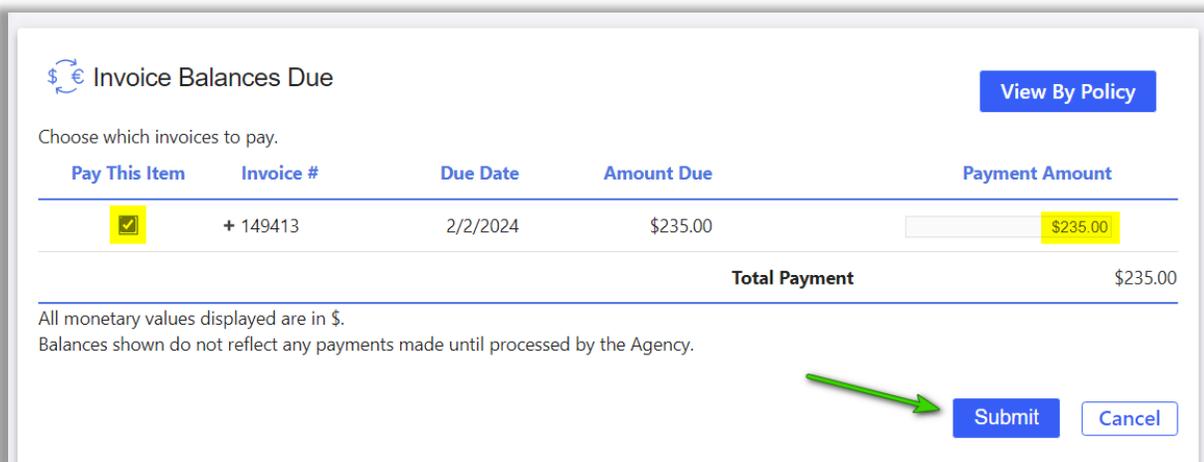
4. To Pay Invoices click on (Checkbox) disclaimer. Then click on "**Pay Now**" button.

5. **Make A Payment** page will display.
   a. Pay by Credit Card (Will be the default). (A fee of 3.5% will be applied).
   b. Enter your credit card information and click on the "**Pay**" button. Or…

c. Click on "**ACH Direct Debit**" radio button option. (A fee of $4.00 will be applied).
d. Enter (a.) Account Holder Name, (b.) Account Number, (c.) ABA Routing Number, and click on "**Pay**" button.

CSR24 – Report A Claim

1. To report a claim, click on "**Report A Claim**" on the 2nd Tile from the left.
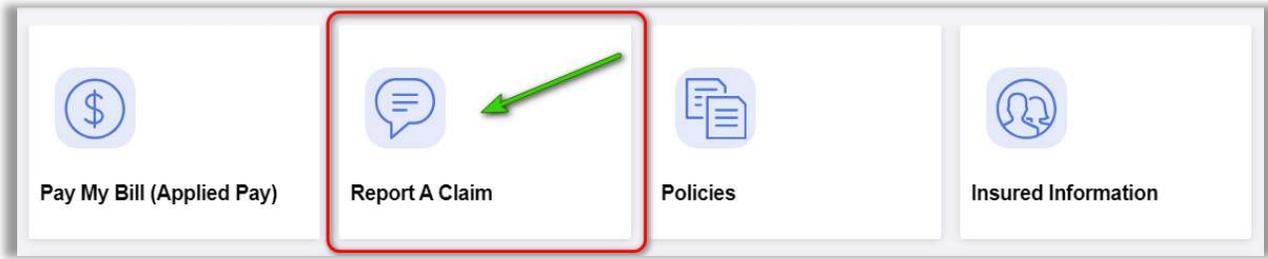
2. You will be rerouted to the NIP Group Claims website.
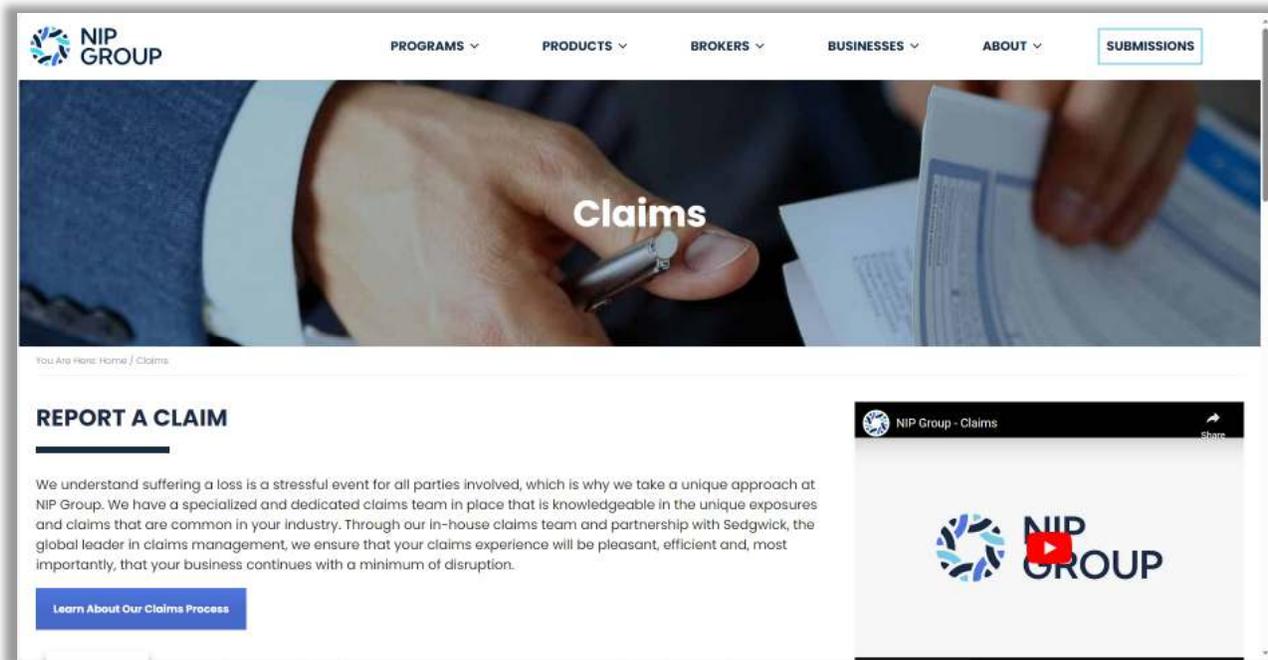
CSR24 – Insured Policies

1. To see Insured's Policy Information, click "**Policies**" on the 3ʳᵈ Tile from the left.

2. You will see all active policies listed.
   a. Click on a Policy record to view more information.
   b. If there are "Documents" to view, you can click on the "Documents" icon.

3. View More Policy information.

4. After clicking on the "Documents" icon, you will see invoice documents, etc…

Select Policy

Documents for Policy NGL-0000000-VOID – [   ]   View Only New ⬤

View All	Sort By Date	▼ Descending

- inv - 8/25/2023 `New`
- inv - 8/25/2023 `New`
- inv - 8/25/2023
- invoice - 8/25/2023 `New`
- Invoice 132228 - 8/25/2023
- Invoice 132229 - 8/25/2023
- Invoice 132237 - 8/25/2023
- Invoice 132238 - 8/25/2023
- Invoice 133527 - 9/12/2023
- Invoice 133528 - 9/12/2023 `New`
- Invoice 138475 - 10/23/2023
- New Insurance Invoice - NIP Group - 9/12/2023 `New`
- New Insurance Invoice - NIP Group - 9/12/2023 `New`
- test inv - 10/23/2023 `New`

CSR24 – Insured "Company" Information

1. To see Insured's Company Information, click on the "**Insured Information**" on the 4th Tile from the left.
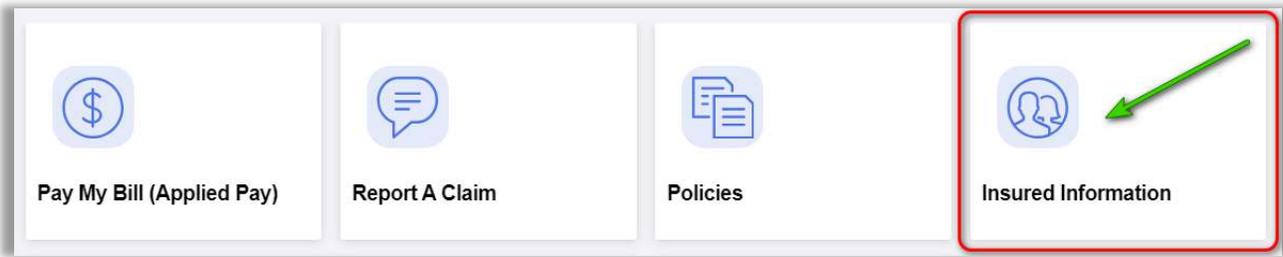
2. You will see all detailed company information e have in our system.

CSR24 – Menu (Left Side)

1. The Menu (On the left-hand side) will have the same links as the Tiles. Additional functions are in <mark>yellow</mark>.

    a. Menu choices (On the left-hand side)
        ii. Insured Information
            1. View Your Policies
            2. View Company Information
        iii. Pay My Bill
        iv. Report A Claim
        v. <mark>View Documents – You will be able to view documents (i.e. Invoices, etc…)</mark>
        vi. <mark>Questions – You will be able to ask a question to your CSR.</mark>
        vii. <mark>Change Password – You will be able the change your password.</mark>
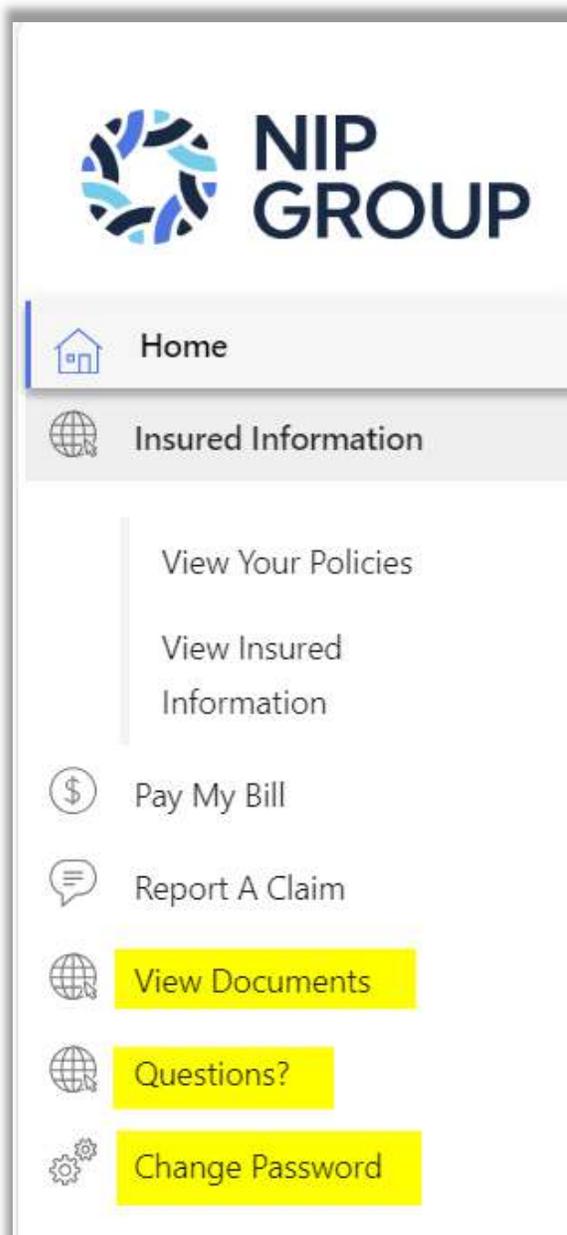
CSR24 – Mobile App

1. To download the <u>CSR24 Mobile App</u> from an Apple device:
   a. Go to the App Store.
   b. Click Search
   c. Type **NIP Group Online**.
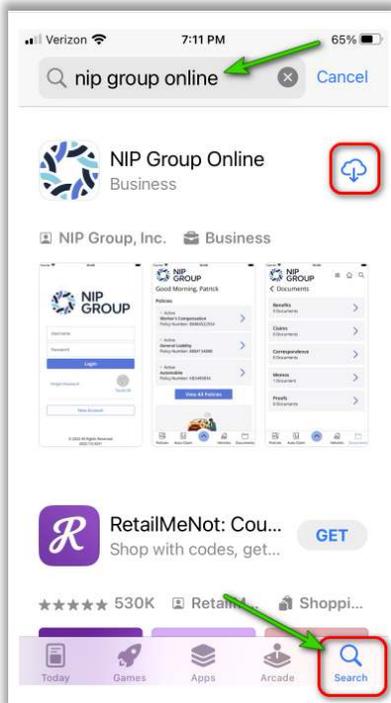
2. Enter your Username and password.
   a. Username is the <***email address***> you used earlier to create your account.
   b. After you enter your password, you can use the **Touch ID** function for easier access.
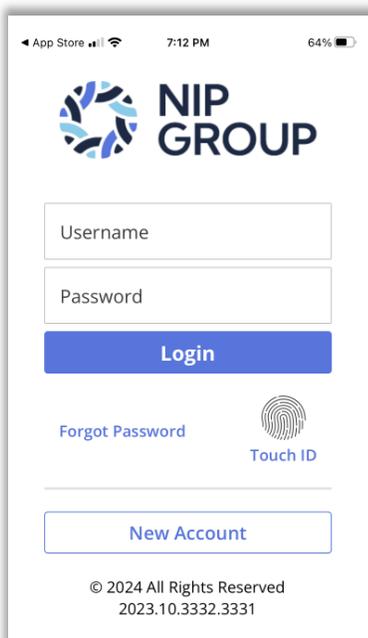
3. The mobile App is comprised of the following functions.
   a. Tile / Menu
      i. Pay My Bill
      ii. Policies
      iii. Documents
      iv. Locations
   Up Arrow (Red)
      v. NIP Group – External Link to NIP Group website
      vi. Contact Your Agent
      vii. Settings – Make your screen (Light, Dark, Auto)
      viii. Logoff

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