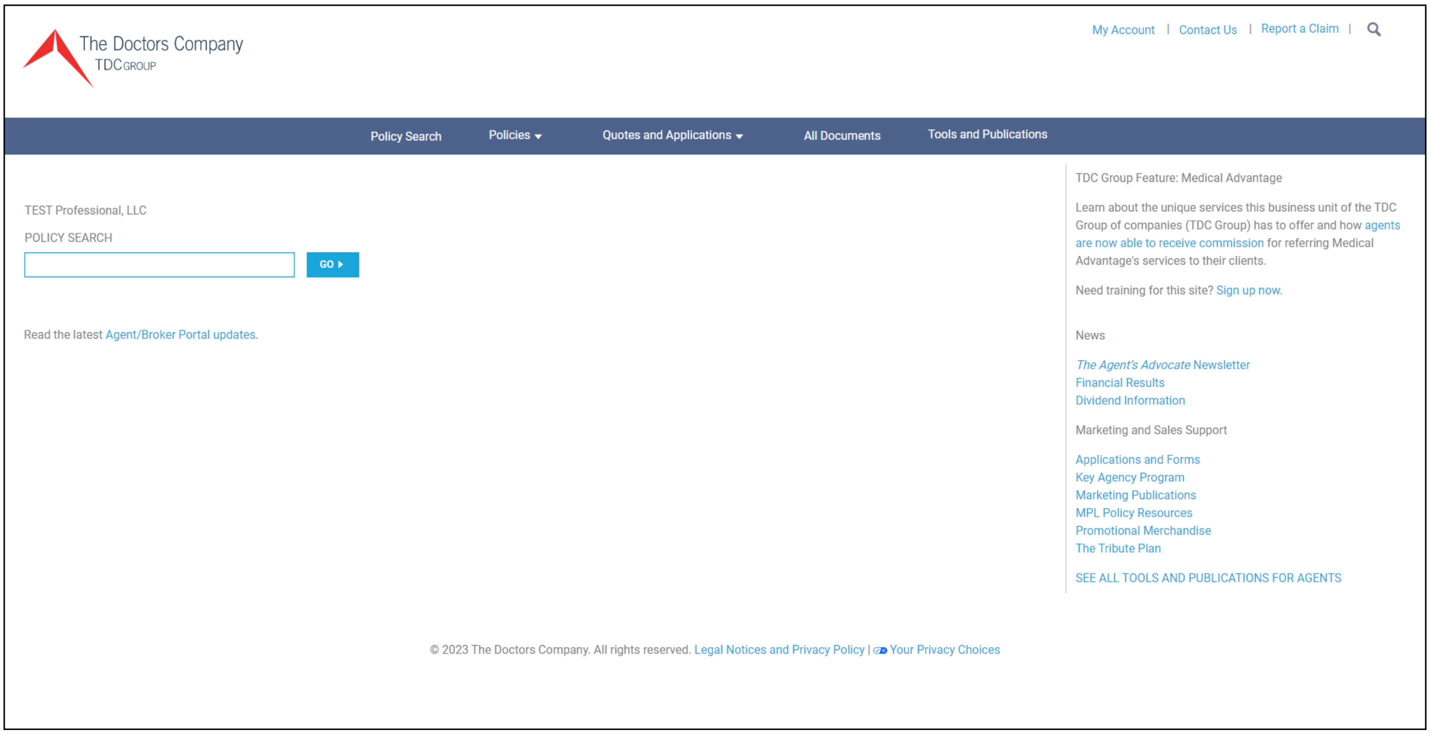
TDC GROUP
The Doctors Company
Healthcare Risk Advisors
TDC Specialty Underwriters
Medical Advantage

# Agent/Broker Portal

## User Guide




Edition Date: 2/15/23

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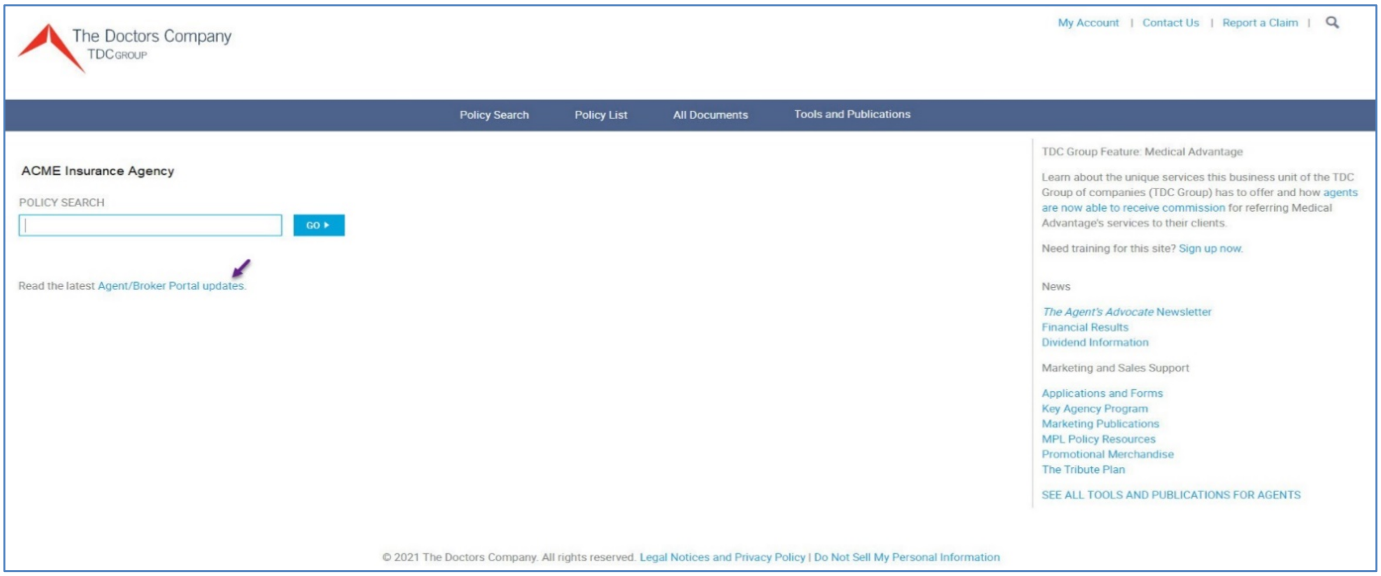
## Introduction

The Doctors Company is committed to helping you service your clients and manage your agency efficiently. We are in the process of upgrading our technology platform and making security and feature enhancements to the Agent/Broker Portal. Doing so helps position The Doctors Company for the expansion and efficient integration of future business processes and technology innovations.

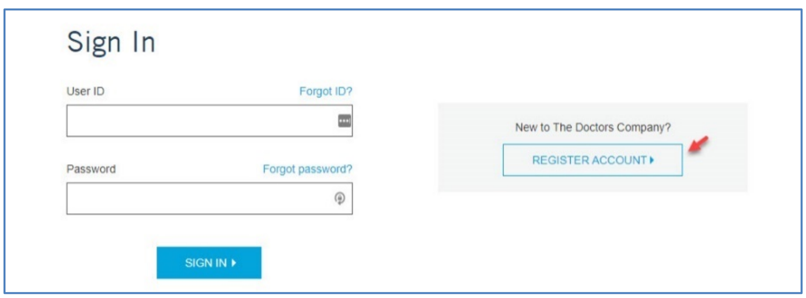
## Agent/Broker Portal Updates

To keep informed of newly installed Agent/Broker Portal features and future enhancements, click **Agent/Broker Portal updates**.

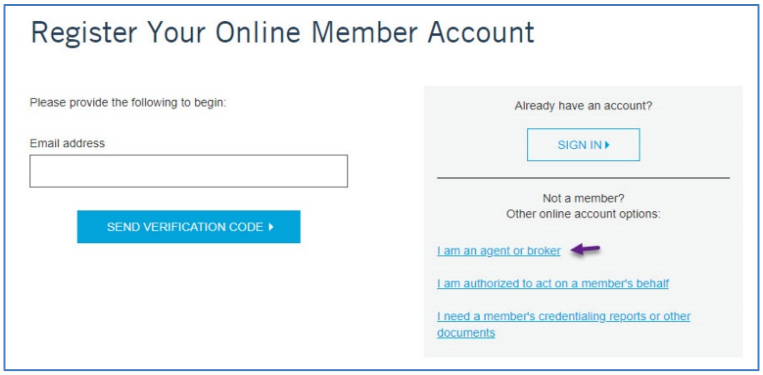


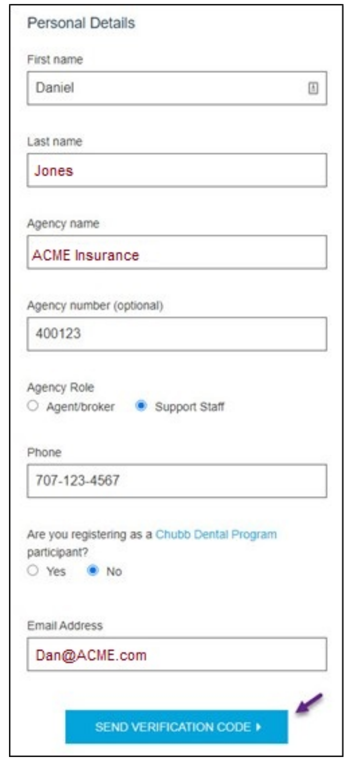

## Register Account

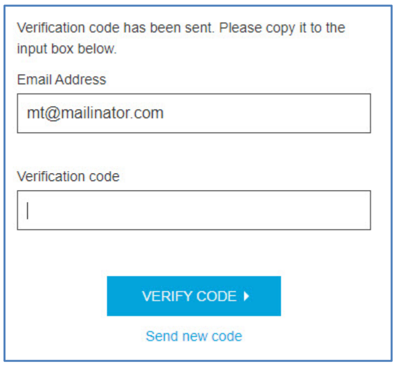
If you do not have an activated user ID and password, click **Register Account**.



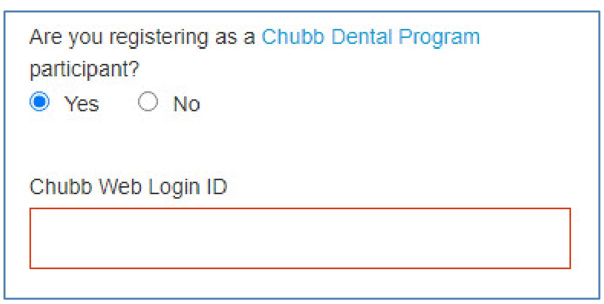
Click **I am an agent or broker** and fill in the details about yourself and your agency.



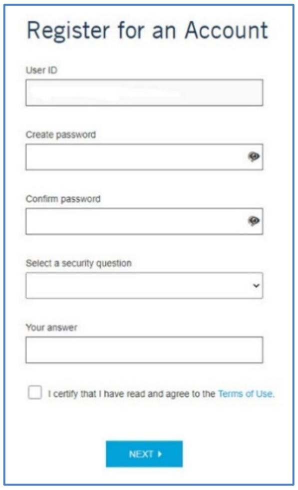

Regarding the question "*Are you registering as a Chubb Dental Program participant?"*




You will then send a verification code to the email address by pressing **Send Verification Code**. Input the verification code and click **Verify Code**.

**Note**: If you have problems with the code provided, click **Send new code**.

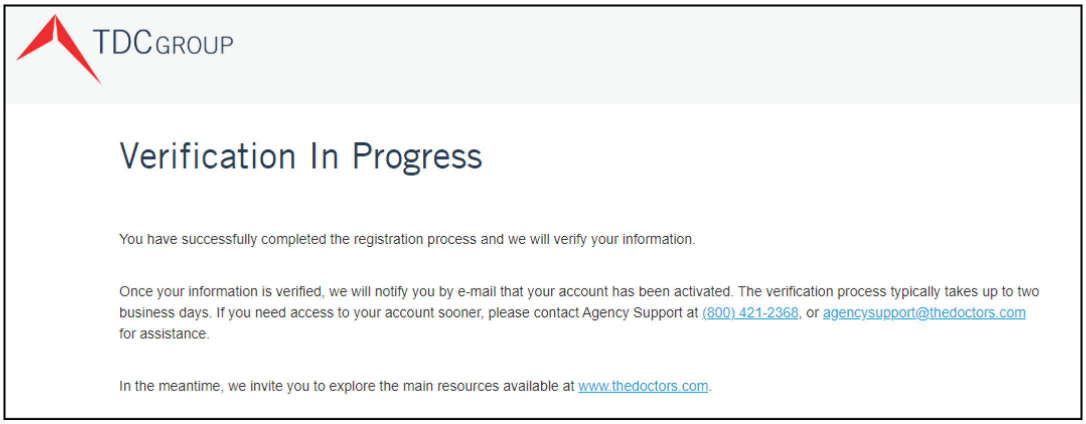
You see the *Register for an Account* screen:




**Note:** Your email address may appear as your user ID. Your password must be a minimum of eight characters and include at least one capitalized letter, at least one number, and at least one special symbol.

Click **Terms of Use** to read through the terms, and then click the **I certify that I have read and agree to the Terms of Use** checkbox. Click **Next**.

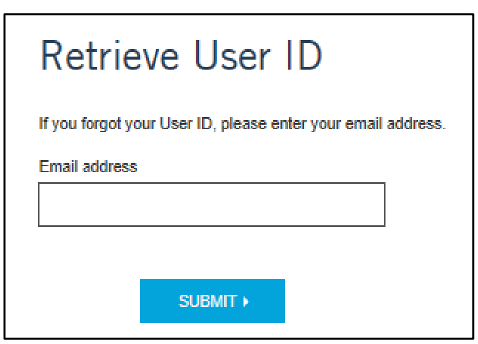
Agency Support will process the online account request. Once processed, an email will be sent to you notifying you that your account access has been activated.




## Sign In

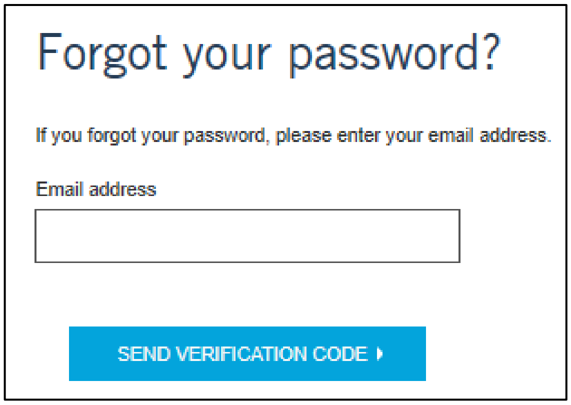
Access thedoctors.com and click **Sign In**.


## User ID Retrieval



## Password Retrieval

To retrieve a forgotten password, click **Forgot Password**, and a verification code will be emailed to you. Use the verification code and link provided in the email to reset your password.



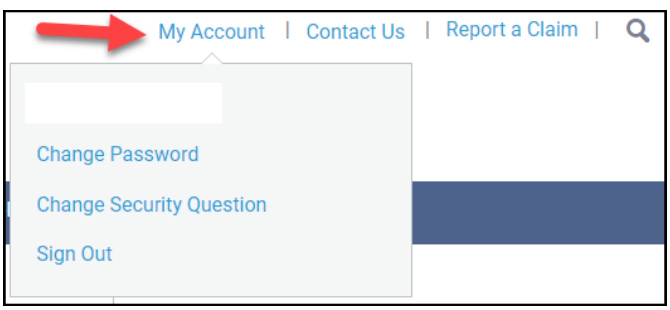

## Landing Page

Once you sign in, you see the *Landing Page*.

**Note: To return to the *Landing Page* from other Agent/Broker Portal screens (Web pages) click The Doctors Company/TDC Group logo in the upper-left corner of the screen.**

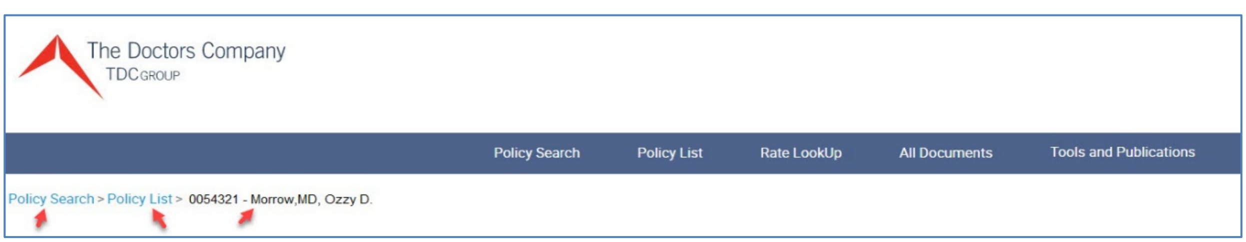

## My Account

Within **My Account**, you can change your password, security questions, and sign out of the account. In some accounts, you can also view commission statements through the Agency Self-Service link.



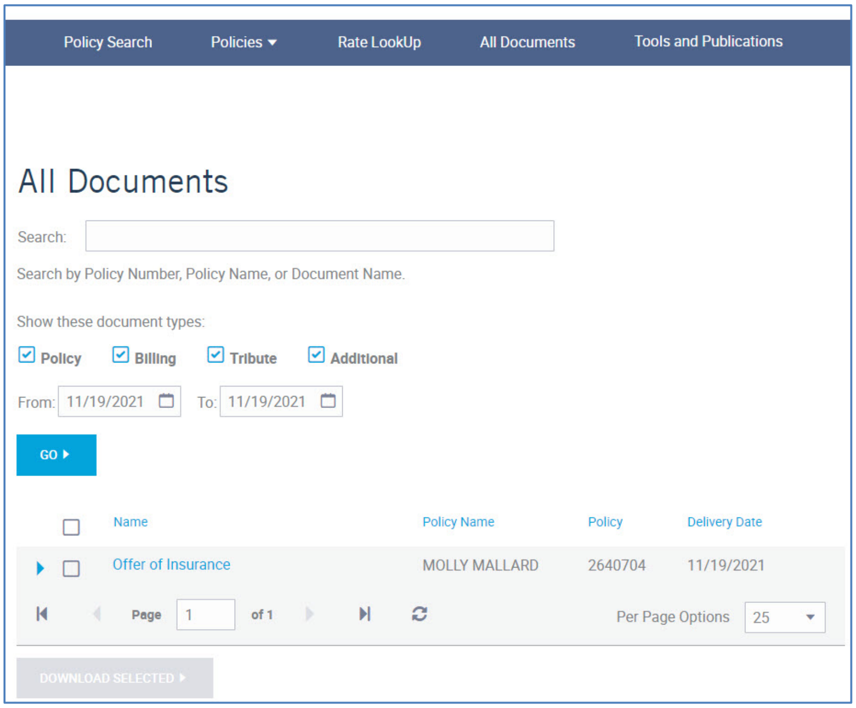

## Breadcrumb Trail

The breadcrumb trail shows you the screen selection path taken. You can click any segment of the breadcrumb trail to return to a specific screen.



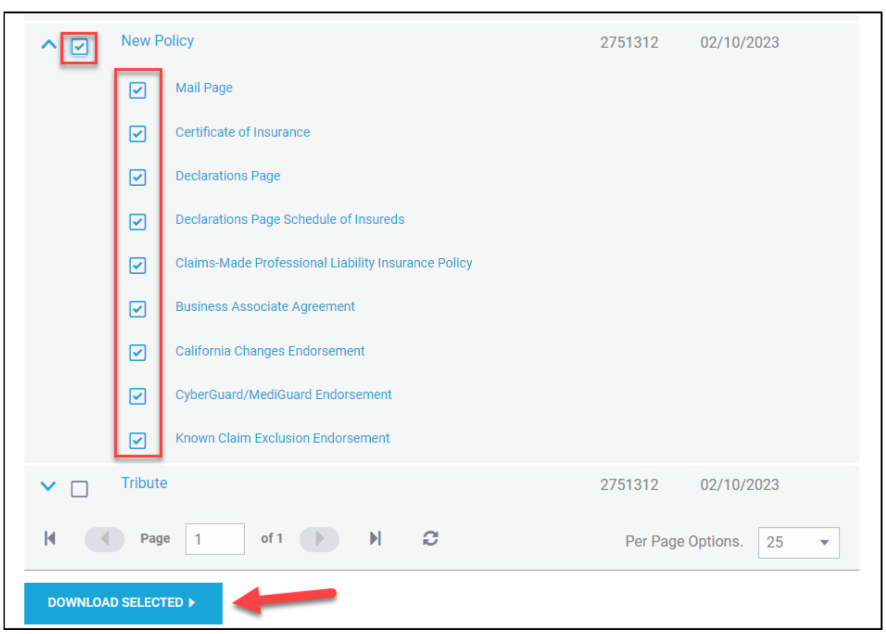
# All Documents and E-Doc Email

When you receive The Doctor Company's e-doc email, and then click **View Documents** (from the email), you see the Agent/Broker Portal's *Sign In* screen. Once signed in, you see the *All Documents* screen and the policy document(s) referenced by the e-doc email.



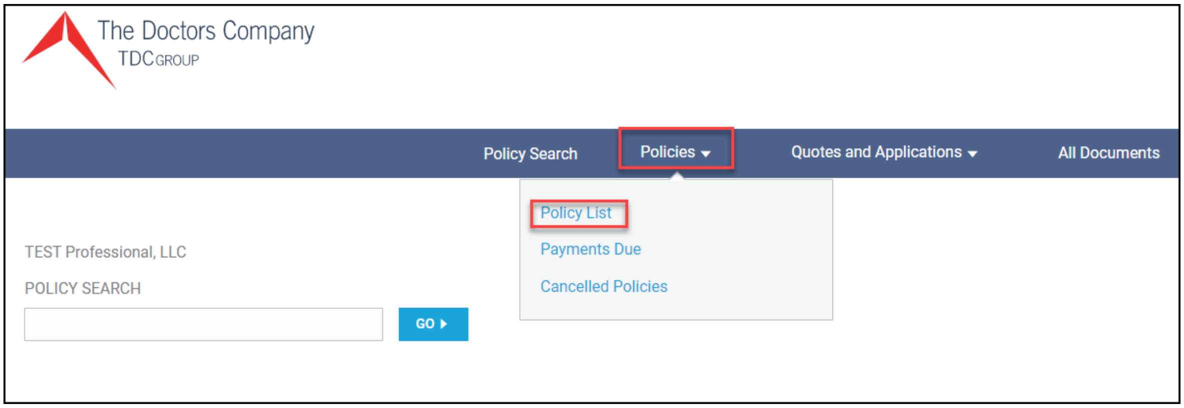

**Note:** The date range defaults to show all policy documents delivered today and is sorted to display documents with the most current delivery date. You can change the dates and click **GO** to expand or shorten the date range search.

You can click the document name to save and open as a PDF. Or click the document checkbox and click **DOWNLOAD SELECTED** to save as a *.ZIP file [(which you can later open to see the individual *.PDF file(s)].

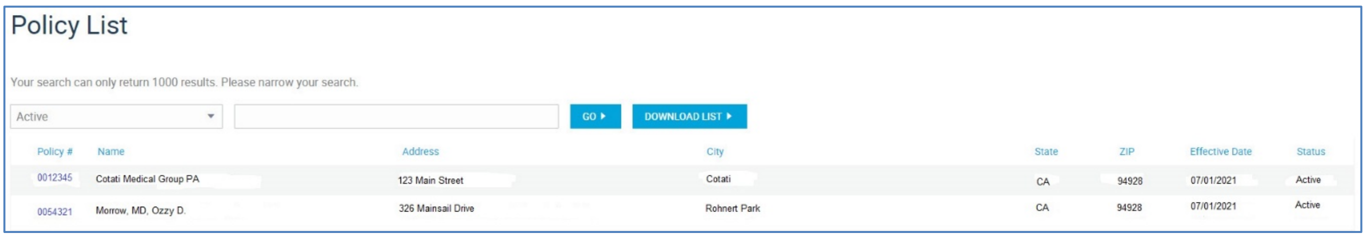


# Policy List

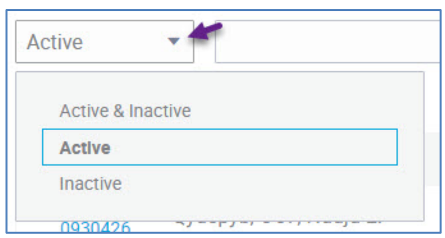
Click **Policies > Policy List** to see a list of all policies associated with your agency.




You will see a list of all policies linked to your portal.



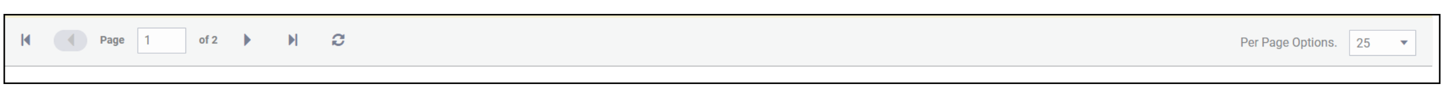

The Policy List defaults to **Active** policies. Click the triangle to change the policy list display to show: **Active & Inactive**, **Active** (default value), or **Inactive**:




Within the **Search** field, you can search by policy or member name.

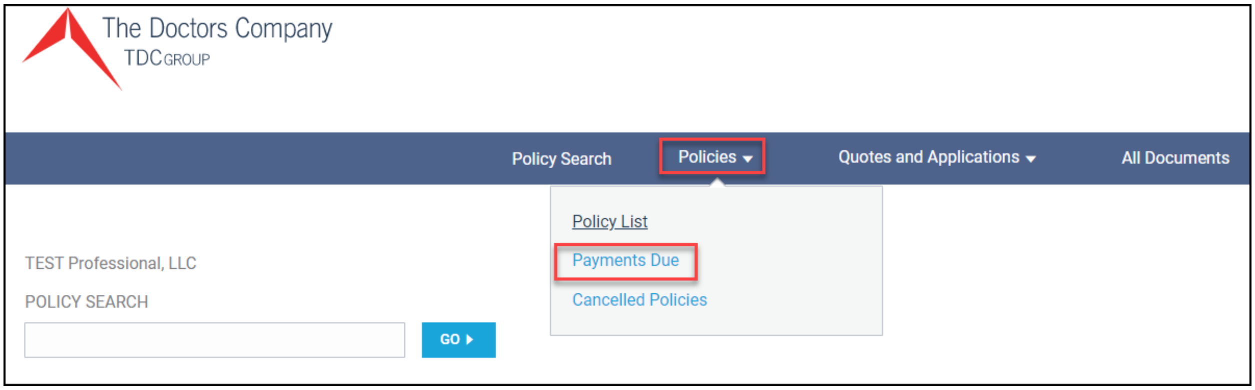
Click **Download List** to export the list. The list will export to a CSV file, which you can save as an Excel Workbook File.

At the bottom of the page, you can move to the next page by pressing **>**. You can move to the last page by pressing **>|**.  On the right side using the dropdown, you can change the number of records viewed per page by 25, 50, and 100.

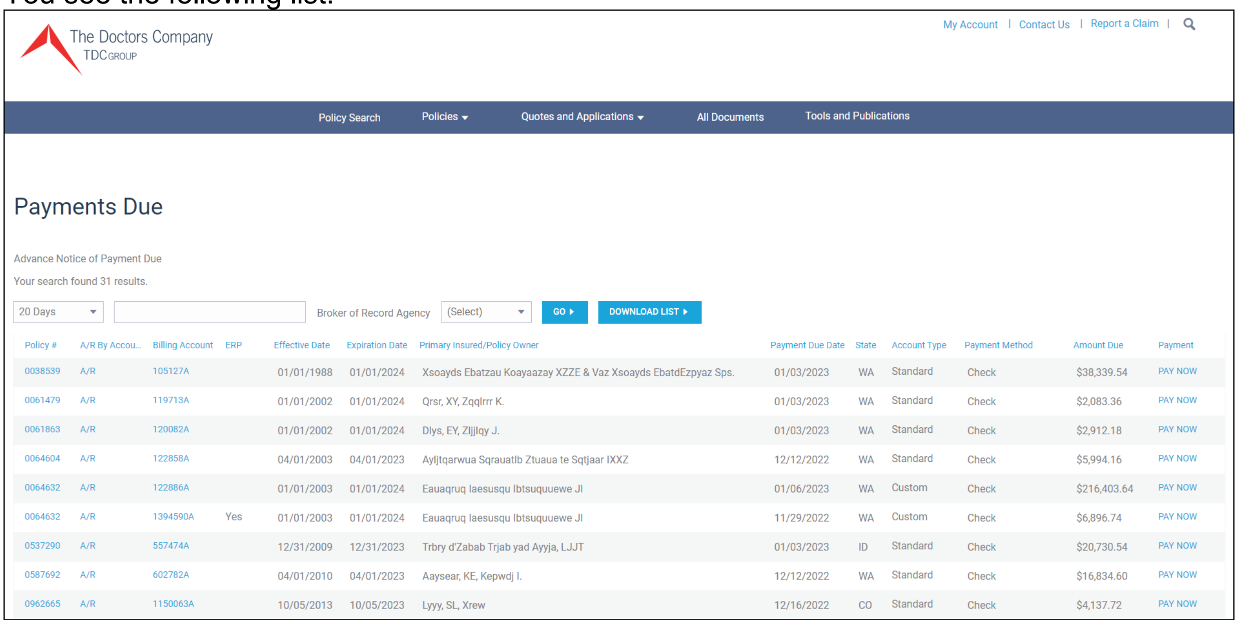


# Payments Due (Advanced Notice of Payment Due)

Click **Policies > Payments Due** to see the **Advance Notice of Payment Due** list that helps you to track policies that have payments due. The Payments Due list includes payments due in 5-, 10-, and 20-days and the expected payment method.




You see the following list:




| Policy # | A/R By Accou... | Billing Account | ERP | Effective Date | Expiration Date | Primary Insured/Policy Owner | Payment Due Date | State | Account Type | Payment Method | Amount Due | Payment |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 0038539 | A/R | 105127A | | 01/01/1988 | 01/01/2024 | Xsoayds Ebatzau Koayaazay XZZE & Vaz Xsoayds EbatdEzpyaz Sps. | 01/03/2023 | WA | Standard | Check | $38,339.54 | PAY NOW |
| 0061479 | A/R | 119713A | | 01/01/2002 | 01/01/2024 | Qrsr, XY, Zqqlrrr K. | 01/03/2023 | WA | Standard | Check | $2,083.36 | PAY NOW |
| 0061863 | A/R | 120082A | | 01/01/2002 | 01/01/2024 | Dlys, EY, Zljjlqy J. | 01/03/2023 | WA | Standard | Check | $2,912.18 | PAY NOW |
| 0064604 | A/R | 122858A | | 04/01/2003 | 04/01/2023 | Ayljtqarwua Sqrauatlb Ztuaua te Sqtjaar IXXZ | 12/12/2022 | WA | Standard | Check | $5,994.16 | PAY NOW |
| 0064632 | A/R | 122886A | | 01/01/2003 | 01/01/2024 | Eauaqruq Iaesusqu Ibtsuquuewe JI | 01/06/2023 | WA | Custom | Check | $216,403.64 | PAY NOW |
| 0064632 | A/R | 1394590A | Yes | 01/01/2003 | 01/01/2024 | Eauaqruq Iaesusqu Ibtsuquuewe JI | 11/29/2022 | WA | Custom | Check | $6,896.74 | PAY NOW |
| 0537290 | A/R | 557474A | | 12/31/2009 | 12/31/2023 | Trbry d'Zabab Trjab yad Ayyja, LJJT | 01/03/2023 | ID | Standard | Check | $20,730.54 | PAY NOW |
| 0587692 | A/R | 602782A | | 04/01/2010 | 04/01/2023 | Aaysear, KE, Kepwdj I. | 12/12/2022 | WA | Standard | Check | $16,834.60 | PAY NOW |
| 0962665 | A/R | 1150063A | | 10/05/2013 | 10/05/2023 | Lyyy, SL, Xrew | 12/16/2022 | CO | Standard | Check | $4,137.72 | PAY NOW |

Within the **Search** field, you can search by policy or member name.

Within the **Broker of Record Agency** dropdown, you can select a certain book of business code to sort policies.

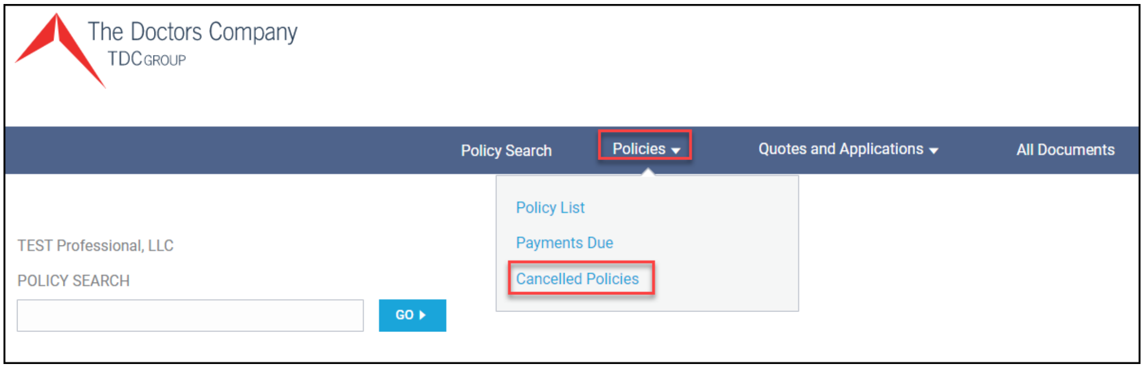
Click **Download List** to export the list. The list will export to a CSV file, which you can save as an Excel Workbook file.

Each column header within the search results is sortable. You can click each column header to sort from A-Z, Z-A, Oldest to newest, and newest to oldest.

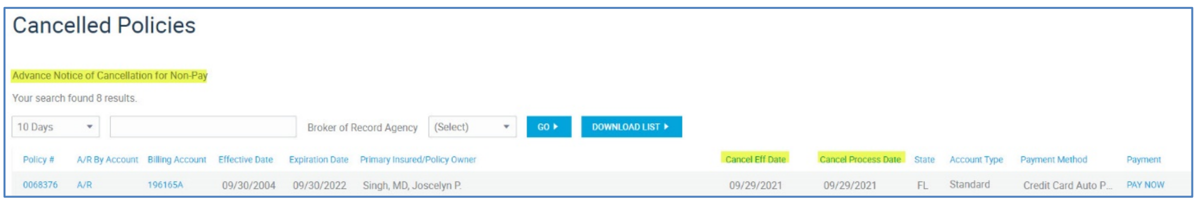
On the last column to the right, you will see the **Pay Now** prompt, which you can click to process e-check or credit card payment on your client's behalf. Otherwise, a payment can be made by contacting Member Services.

## Cancelled Policies (Advanced Notice of Cancellation for Non-Pay)

Click **Policies > Cancelled Policies** to see **Advanced Notice of Cancellation for Non-Pay** list that helps you to track policies that could be canceled for non-payment. This online list includes 5- and 10-day advance notice of cancellation effective dates and cancellation process dates.




You see the following list:




Within the **Search field**, you can search by policy or member name.

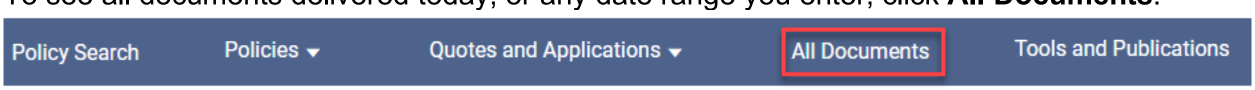
Within the **Broker of Record Agency** drop down, you can select a certain book of business code to sort policies.

Click **Download List** to export the list. The list will export to a CSV file, which you can save as an Excel Workbook File.

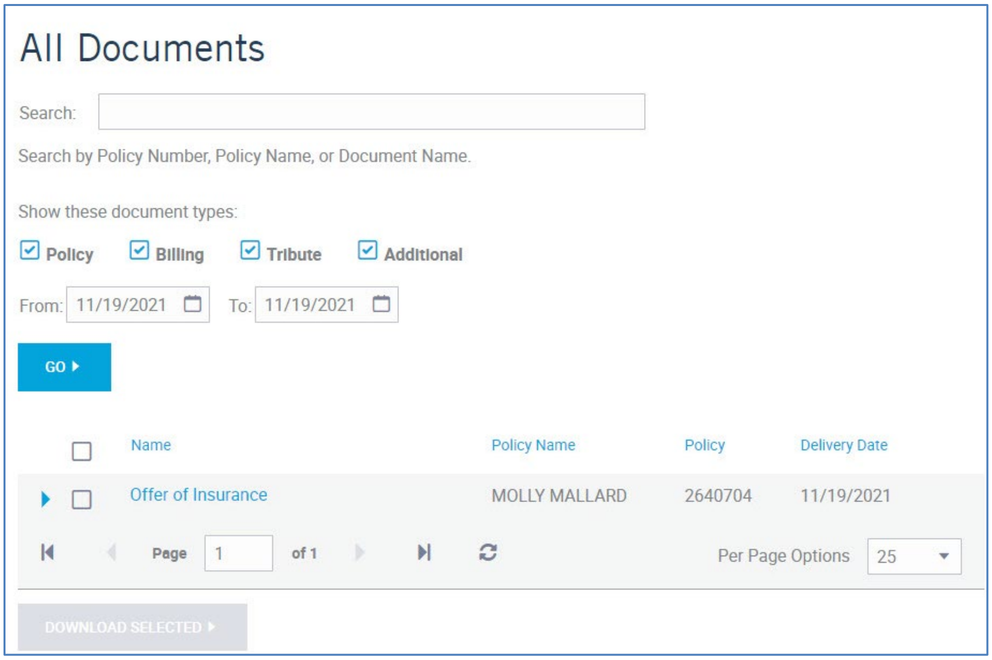
Each column header within the search results is sortable. You can click each column header to sort from A–Z, Z–A, oldest to newest, and newest to oldest.

## All Documents

To see all documents delivered today, or any date range you enter, click **All Documents**.

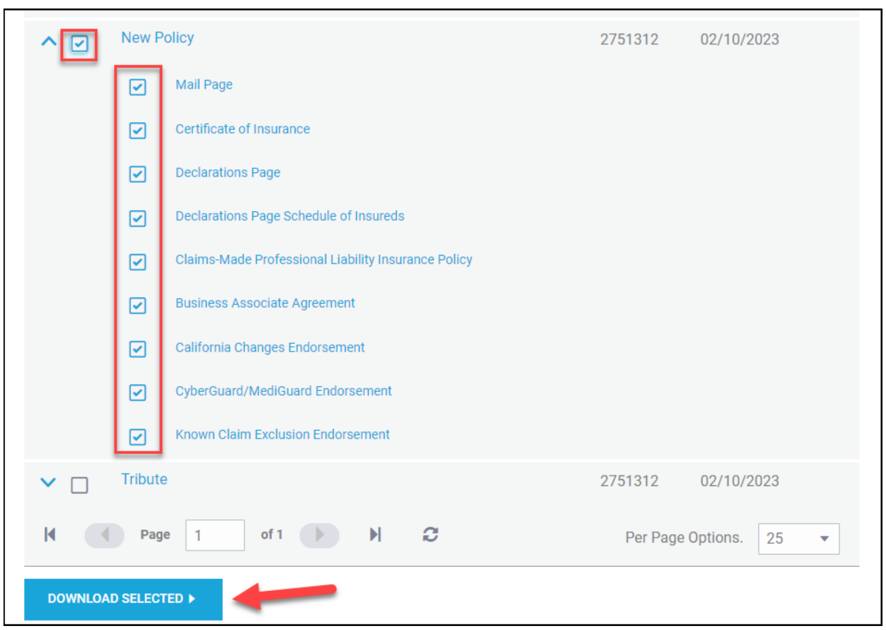



You see the *All Documents* screen.



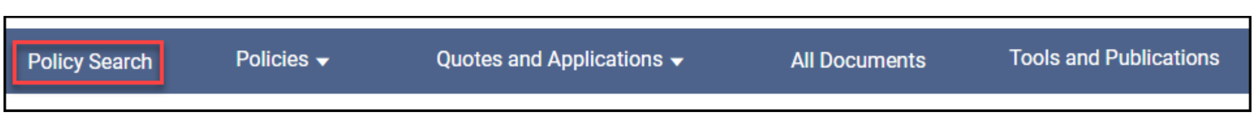

**Note:** The date range defaults to show all policy documents delivered today and is sorted to display documents with the most current delivery date. You can change the dates and click **GO** to expand or shorten the date range search.

You can click the document name to save the file and open as a PDF. Or click the document checkbox and click **DOWNLOAD SELECTED** to save as a *.ZIP file [which you can later open to see the individual *.PDF file(s)].

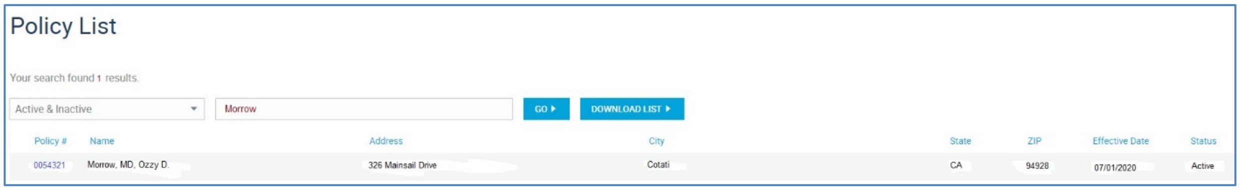



## Policy Search

To find a specific policy, click **Policy Search**. You see the *Policy Search* screen.



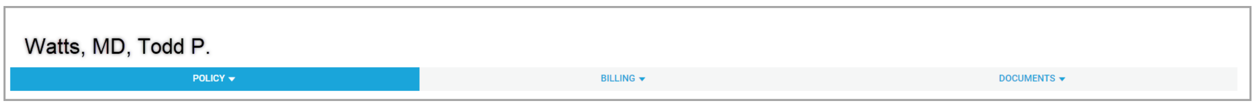

Enter the policy number or name in the **POLICY SEARCH** field and click **GO**. You will see the search results.



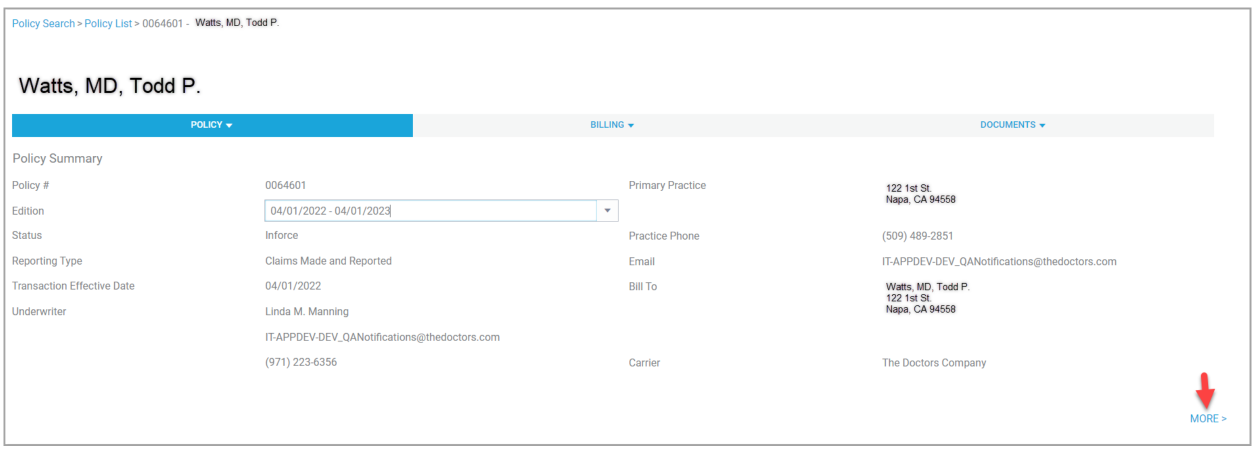

Click the policy number to see the *Policy Summary* screen.

## Policy Drop-Down Resources

Below the policy name, you will see the **Policy**, **Billing**, and **Documents** policy-specific resources.



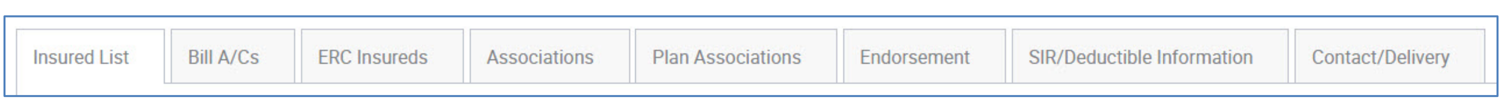

Below the **Policy**, **Billing**, and **Documents** menu, you will see the Policy Summary screen. Click **MORE** to view more information.




To return to the default policy summary screen view, click **LESS**.


## Policy Tab Resources

After selecting a policy, you will also see the following tabs when you scroll to the bottom of the P*olicy Summary* screen. Click each tab to view the information listed.

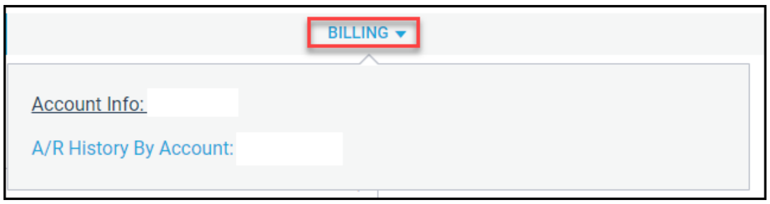


## Insured Detail

Within a policy, you can view the details for each insured in the **Insured List**. Click on the insured member's name to see the *Insured Detail* information.

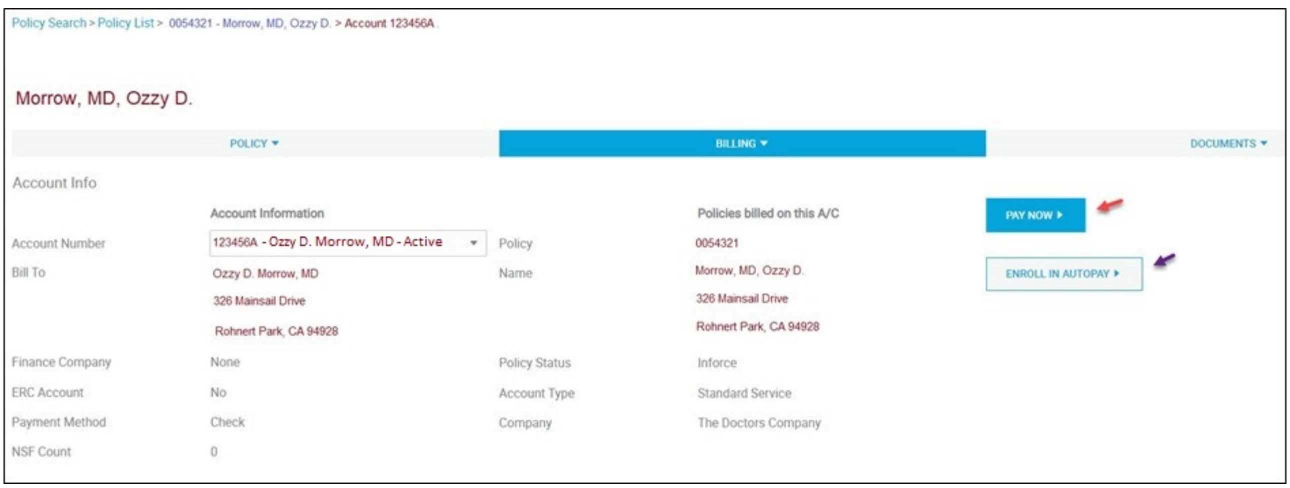

## Policy Billing Drop-Down Resources

The Billing drop-down resource has the following menu options:




### Account Info

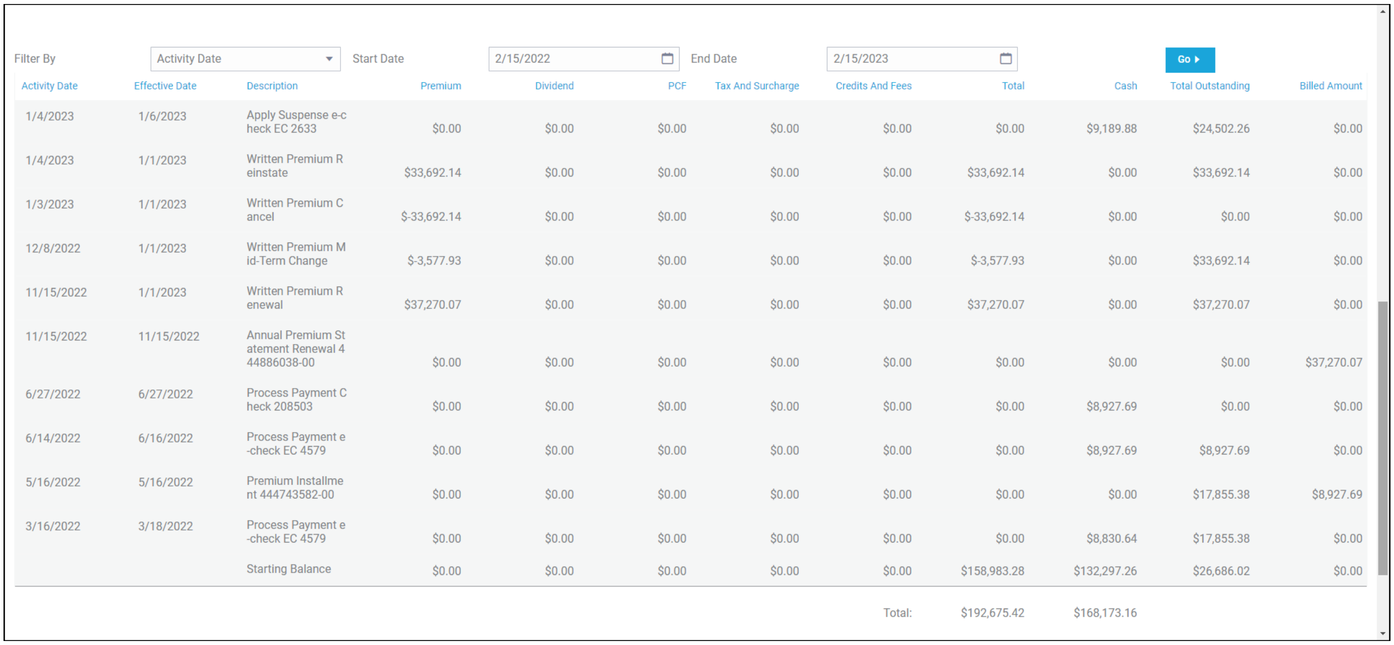
Click **Billing > Account Info** to see the *Account Info* screen.




Within this area, you can:

- Click **PAY NOW** to process a payment on behalf on your client (using the client's credit card or checking account information, or
- Click **ENROLL IN AUTOPAY** to set up recurring payments for your client (using the client's credit card or checking account information.

Scrolling to the bottom of the page, you will be able to see line-by-line accounting based on the debits and credits of the billing account. You can filter by selecting either **Activity Date**, **Start Date**, and **End Date**, then pressing **GO**.

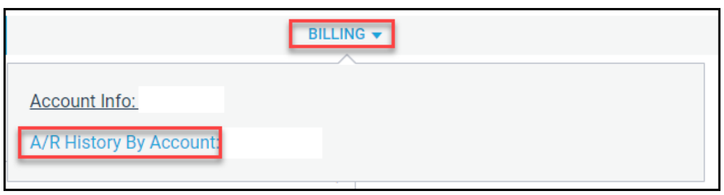


Filter By: Activity Date | Start Date: 2/15/2022 | End Date: 2/15/2023 | Go

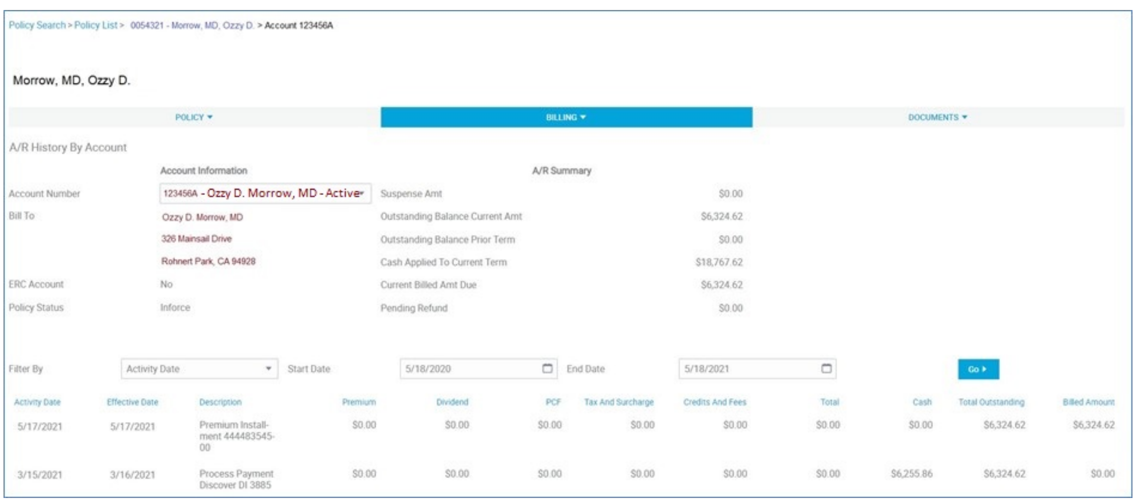
| Activity Date | Effective Date | Description | Premium | Dividend | PCF | Tax And Surcharge | Credits And Fees | Total | Cash | Total Outstanding | Billed Amount |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 1/4/2023 | 1/6/2023 | Apply Suspense e-check EC 2633 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $9,189.88 | $24,502.26 | $0.00 |
| 1/4/2023 | 1/1/2023 | Written Premium Reinstate | $33,692.14 | $0.00 | $0.00 | $0.00 | $0.00 | $33,692.14 | $0.00 | $33,692.14 | $0.00 |
| 1/3/2023 | 1/1/2023 | Written Premium Cancel | $-33,692.14 | $0.00 | $0.00 | $0.00 | $0.00 | $-33,692.14 | $0.00 | $0.00 | $0.00 |
| 12/8/2022 | 1/1/2023 | Written Premium Mid-Term Change | $-3,577.93 | $0.00 | $0.00 | $0.00 | $0.00 | $-3,577.93 | $0.00 | $33,692.14 | $0.00 |
| 11/15/2022 | 1/1/2023 | Written Premium Renewal | $37,270.07 | $0.00 | $0.00 | $0.00 | $0.00 | $37,270.07 | $0.00 | $37,270.07 | $0.00 |
| 11/15/2022 | 11/15/2022 | Annual Premium Statement Renewal 444886038-00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $37,270.07 |
| 6/27/2022 | 6/27/2022 | Process Payment Check 208503 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $8,927.69 | $0.00 | $0.00 |
| 6/14/2022 | 6/16/2022 | Process Payment e-check EC 4579 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $8,927.69 | $8,927.69 | $0.00 |
| 5/16/2022 | 5/16/2022 | Premium Installment 444743582-00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $17,855.38 | $8,927.69 |
| 3/16/2022 | 3/18/2022 | Process Payment e-check EC 4579 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $8,830.64 | $17,855.38 | $0.00 |
| | | Starting Balance | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $158,983.28 | $132,297.26 | $26,686.02 | $0.00 |
| | | | | | | | Total: | $192,675.42 | $168,173.16 | | |

## A/R History by Account

Click **Billing > A/R History by Account** to see the *A/R History by Account* screen.




The example shows the recent A/R history for this policy sorted by **Activity Date**.



Policy Search > Policy List > 0054321 - Morrow, MD, Ozzy D. > Account 123456A

Morrow, MD, Ozzy D.

POLICY | BILLING | DOCUMENTS

A/R History By Account

| | Account Information | A/R Summary | |
|---|---|---|---|
| Account Number | 123456A - Ozzy D. Morrow, MD - Active | Suspense Amt | $0.00 |
| Bill To | Ozzy D. Morrow, MD | Outstanding Balance Current Amt | $6,324.62 |
| | 326 Mainsail Drive | Outstanding Balance Prior Term | $0.00 |
| | Rohnert Park, CA 94928 | Cash Applied To Current Term | $18,767.62 |
| ERC Account | No | Current Billed Amt Due | $6,324.62 |
| Policy Status | Inforce | Pending Refund | $0.00 |

Filter By: Activity Date | Start Date: 5/18/2020 | End Date: 5/18/2021 | Go

| Activity Date | Effective Date | Description | Premium | Dividend | PCF | Tax And Surcharge | Credits And Fees | Total | Cash | Total Outstanding | Billed Amount |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 5/17/2021 | 5/17/2021 | Premium Installment 444483545-00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $6,324.62 | $6,324.62 |
| 3/15/2021 | 3/16/2021 | Process Payment Discover DI 3885 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $6,255.86 | $6,324.62 | $0.00 |

Policies that begin with “26” have transitioned to our new policy platform and present a simplified *A/R History by Account* screen (shown below).

| Effective Date | Category | AR History DC Description | Amount |
|---|---|---|---|
| 11/05/2021 | Payment Received | Credit Card payment for $9298.93 received. Receipt date: 11/05/2021 | $9,298.93 |
| 11/02/2021 | Invoice | Invoice created. Total amount due $16995.33. Due date 11/22/2021 | $16,995.33 |
| 10/15/2021 | Payment Reminder Notice | Payment Reminder Notice sent to atirumala@thedoctors.com | |
| 10/01/2021 | Invoice | Invoice created. Total amount due $16995.33. Due date 10/22/2021 | $16,995.33 |
| 09/17/2021 | Payment Reminder Notice | Payment Reminder Notice sent to atirumala@thedoctors.com | |
| 09/02/2021 | Invoice | Invoice created. Total amount due $16995.33. Due date 09/22/2021 | $16,995.33 |
| 08/17/2021 | Payment Reminder Notice | Payment Reminder Notice sent to atirumala@thedoctors.com | |
| 08/02/2021 | Invoice | Invoice created. Total amount due $16995.33. Due date 08/22/2021 | $16,995.33 |
| 03/15/2021 | Policy Transaction | Flat Cancellation (Policy 2601045 2/22/2021 - 2/22/2022): receivable has been processed. | $15,392.79 |
| 02/22/2021 | Policy Transaction | Endorsement (Policy 2601045 4/1/2021 - 2/22/2022): receivable has been processed. | $-13,790.25 |
| 02/22/2021 | Invoice | Invoice created. Total amount due $3848.20. Due date 03/14/2021 | $3,848.20 |
| 02/22/2021 | Policy Transaction | New Business (Policy 2601045 2/22/2021 - 2/22/2022): receivable has been processed. | $15,392.79 |
| 02/22/2021 | Policy Term Issued | Policy Term 2601045 02/22/2021 - 02/22/2022 created | |
| 02/22/2021 | Account Created | Account created. | |

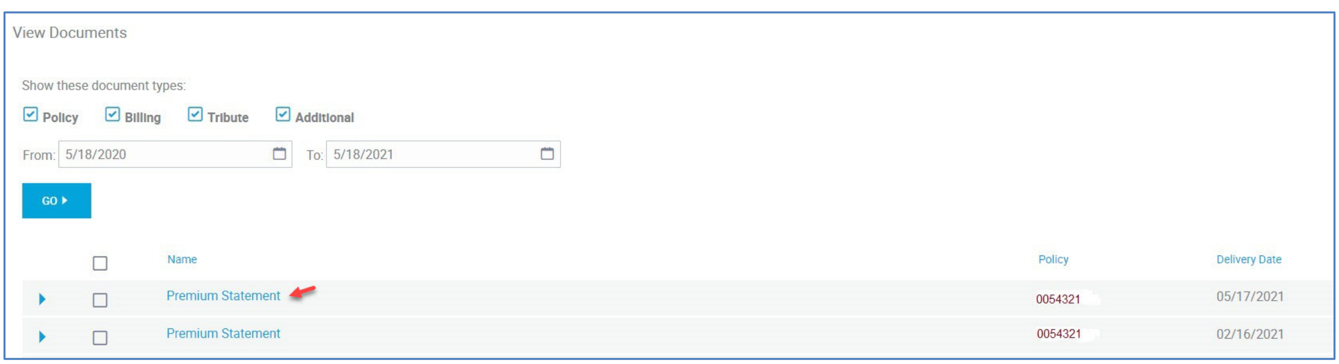
## Documents Drop-Down Resources

### View Documents

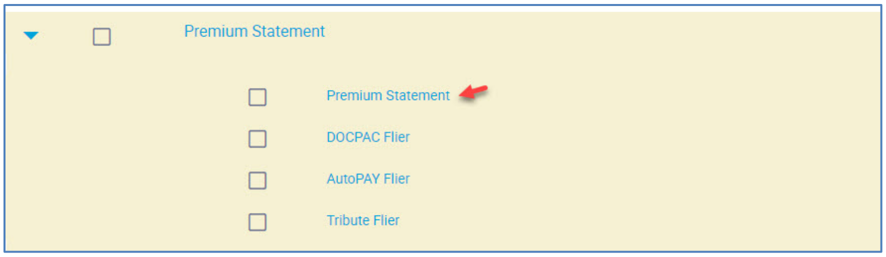
Click the **Documents** drop-down arrow and select **View Documents**.


You will see the *View Documents* screen.

**Note**: The date range defaults to the last 12 months and is sorted to display documents with the most current delivery date. You can change the dates and click **GO** to expand or shorten the date range search.




With the above example, you can click **Premium Statement** to open the premium statement packet to see the following individual document names.

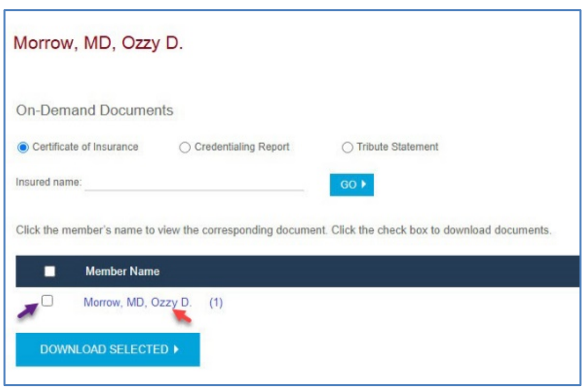




## Certificate of Insurance

Click **Documents > Certificate of Insurance** to see the *Certificate of Insurance* screen.

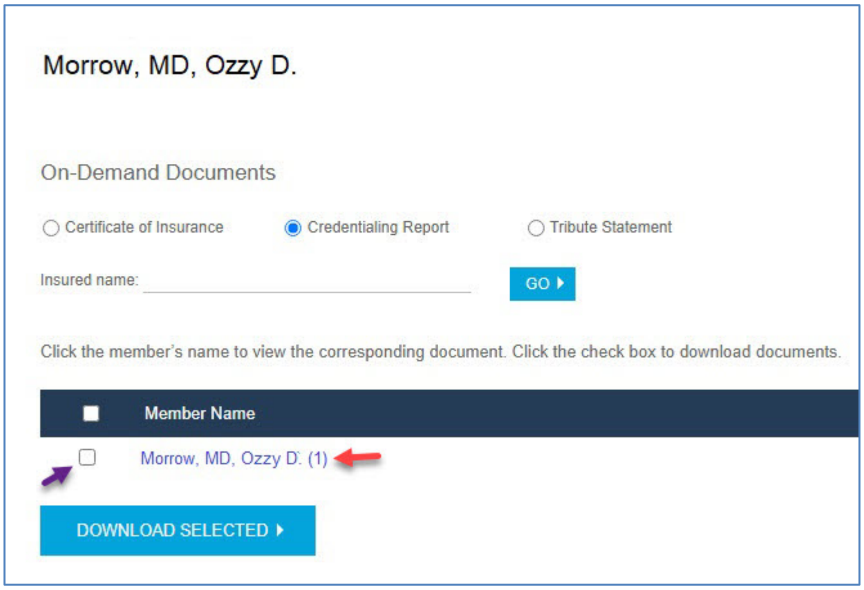

Click on the member's name link to download the certificate of insurance (COI).




## Credentialing Report

Click **Documents > Credentialing Report** to see the *Credentialing Report* screen.


Click on the member's name link to download the credentialing report.



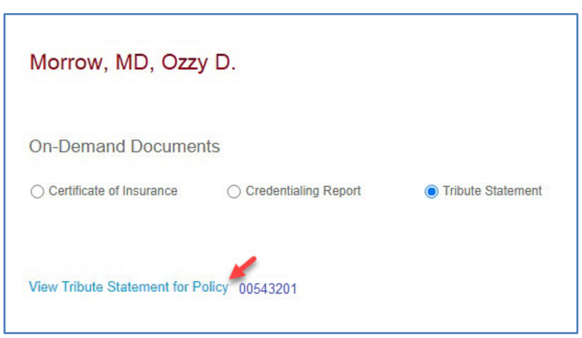

For both documents, you can click the member's name to view the COI as a *.PDF (see **red** Arrow) or click the checkbox (see **purple** arrow) and then click **Download Selected** to download and save the file as a *.PDF.

**Note**: You are not able to generate a credentialing report for a member that has "cancelled" as their insured status. Member Services can provide the requested report to the cancelled member if the former insured member provides the request in writing on their company letterhead and sign and date it within the last two years. The member can send the request to memberservices@thedoctors.com. The loss run/claims history report will be submitted directly back to the member for their review.

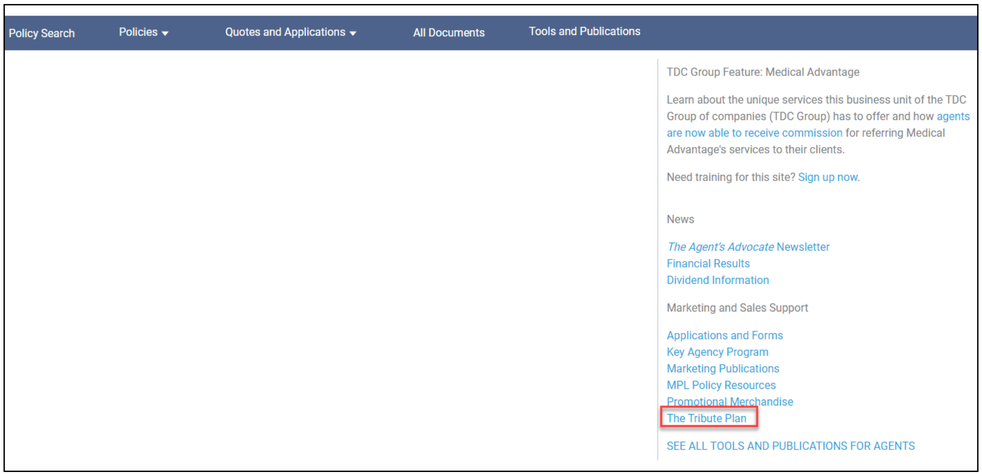
## Tribute Statement

Click **Documents > Tribute Statement** to see the *Tribute Statement* screen.


Click **View Tribute Statement for Policy** to see the Tribute Statement.



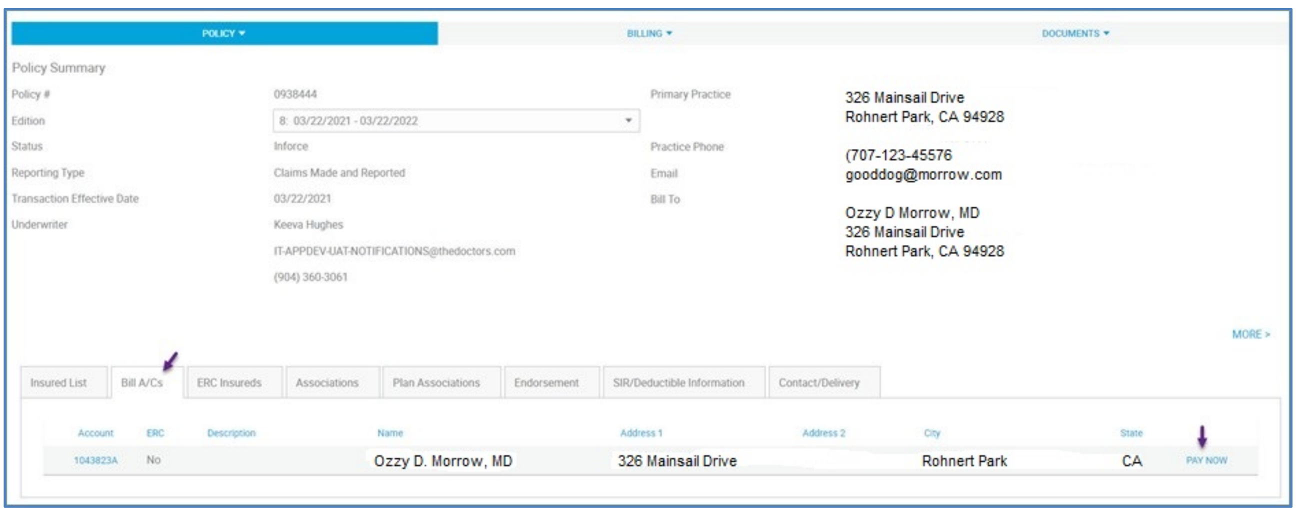
For more information on the Tribute® Plan, click **The Tribute Plan** from the portal landing page.




## Make a Payment

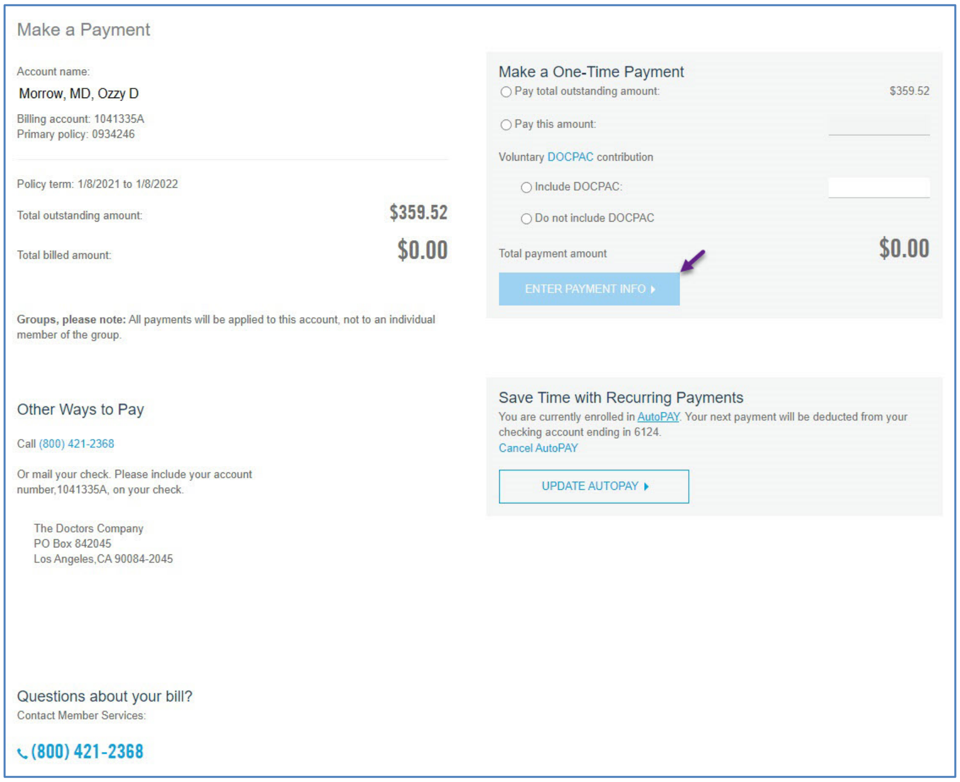
From the **POLICY SEARCH** tool, enter the policy name or policy number, and click **GO**.


You see the **Policy Summary** screen.



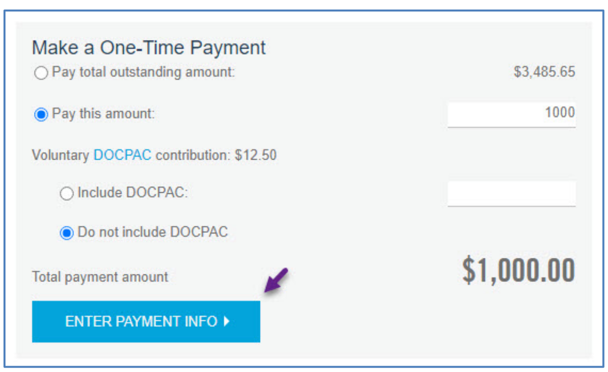

Click the **Bill A/Cs** tab and then click **PAY NOW**.

To make a one-time payment on behalf of your client using his or her e-check or credit card information, click **Pay amount due**, or click **Pay total outstanding amount**. Follow the prompts to complete payment.

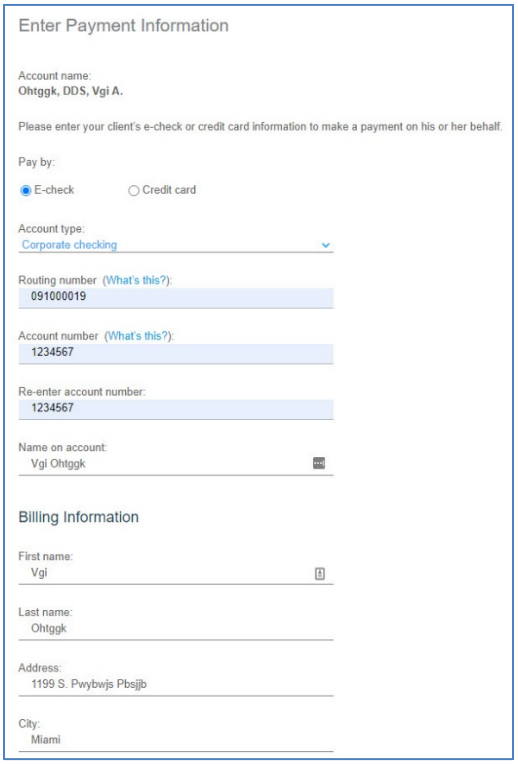


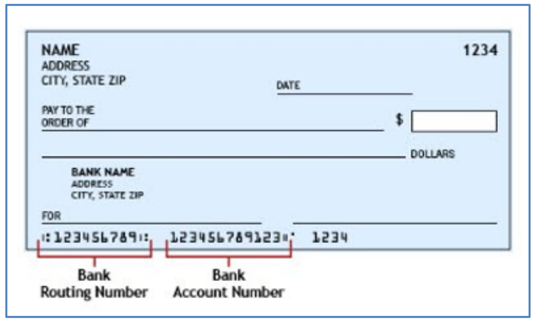

## Make an E-Check Payment

From the *Make a One-Time Payment* screen, enter the payment amount in the *Pay this amount* field and click **ENTER PAYMENT INFO**.



Enter the e-check information and follow the prompts to complete payment.

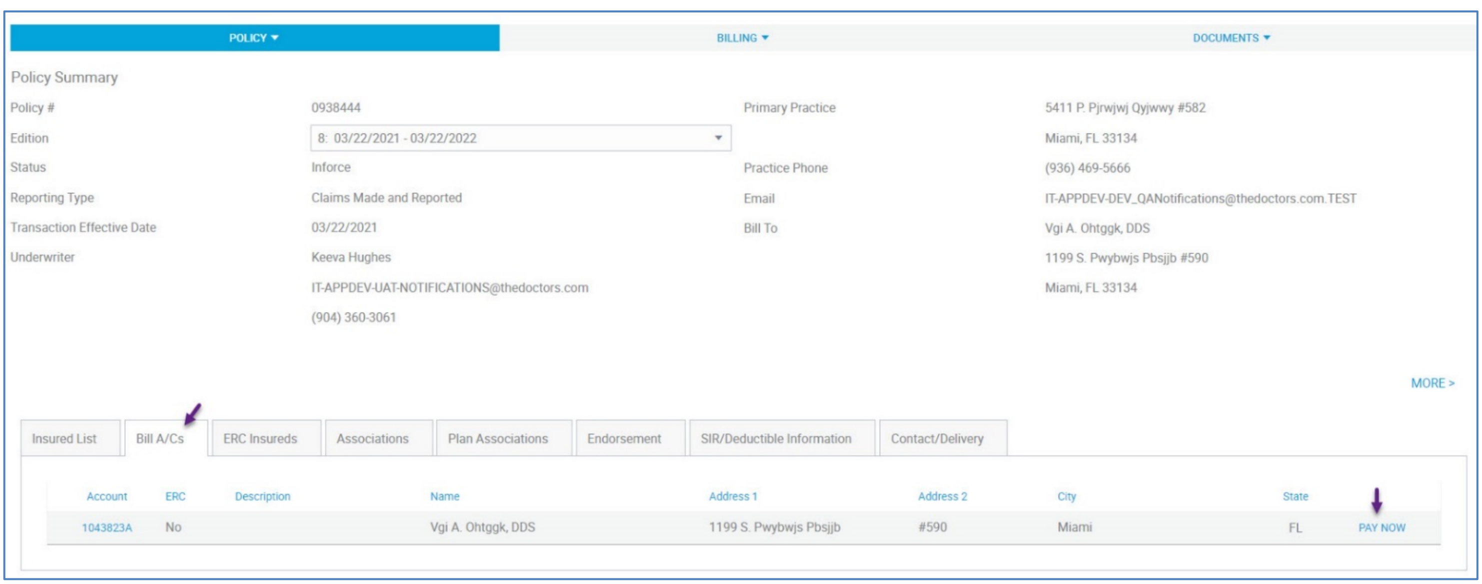


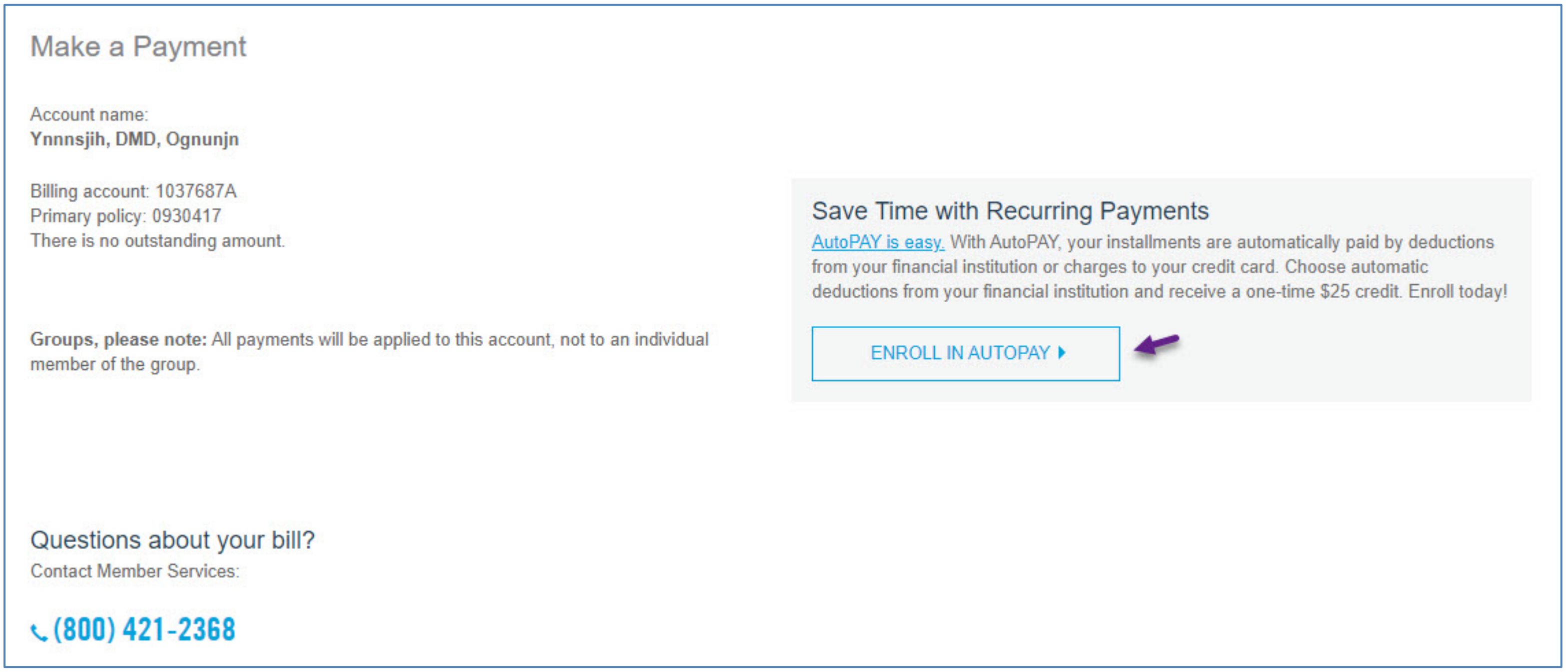

## Enroll in AutoPAY

From the **POLICY SEARCH** tool, enter the policy name or policy number, and click **GO**.


You see the *Policy Summary* screen. Click the **Bill A/Cs** tab and then click **PAY NOW**.



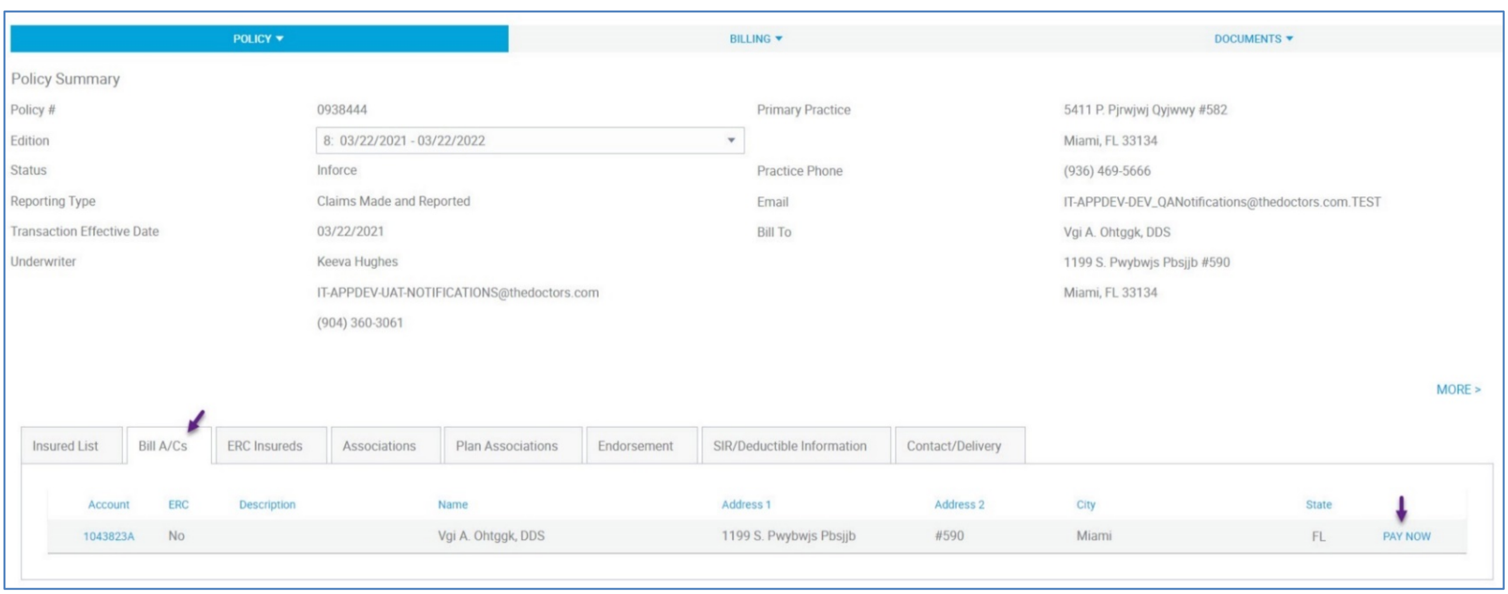
Click **ENROLL IN AUTOPAY** and enter the member's information.



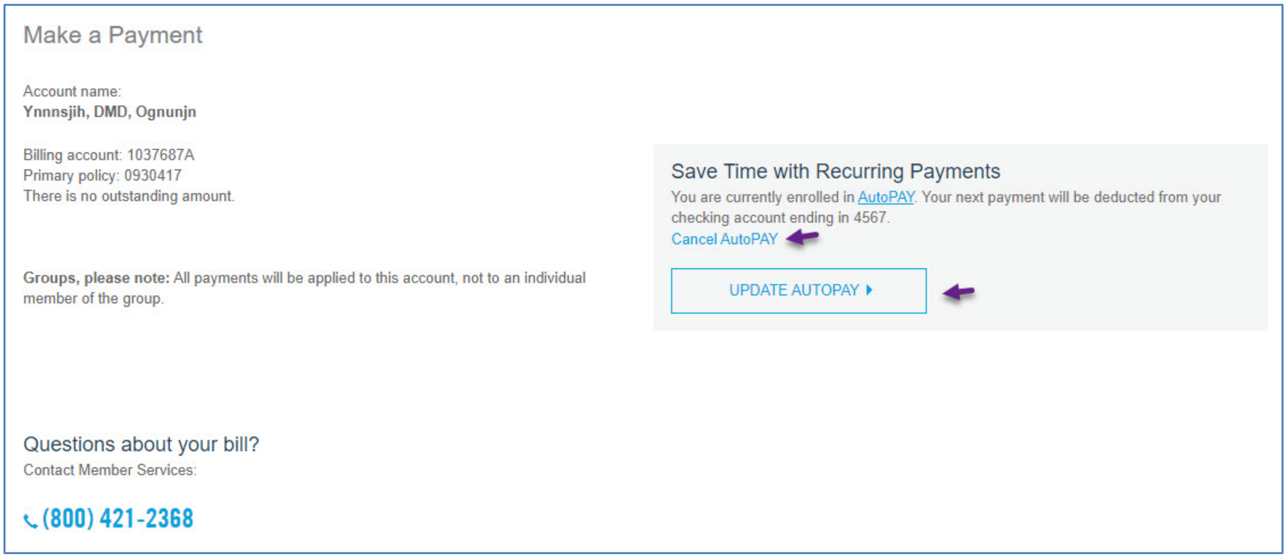

## Update or Cancel AutoPAY

To update or cancel AutoPAY for a policy, From the **POLICY SEARCH** tool, enter the policy name or policy number, and click **GO**.

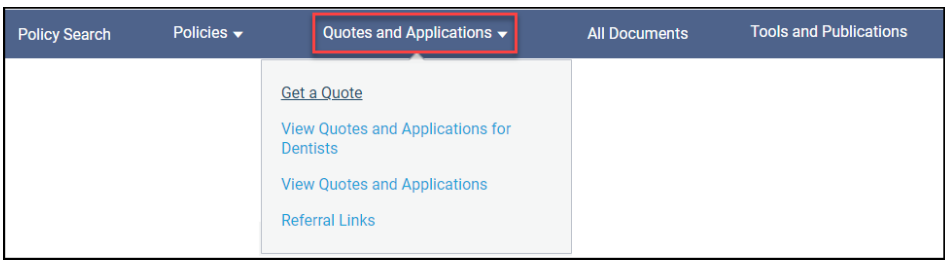

You see the *Policy Summary* screen. Click the **Bill A/Cs** tab and then click **PAY NOW**.



To cancel an upcoming AutoPAY, click **Cancel AutoPAY** and follow the prompts. To make changes to an existing AutoPay, click **UPDATE AUTOPAY**.




## Quotes and Applications

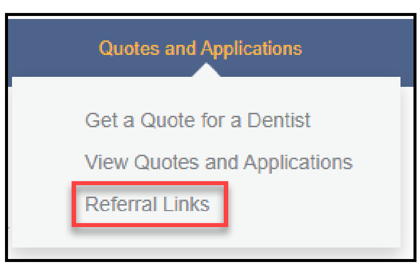



**Quotes and Applications** is a resource for agencies that are set up to process online quotes and applications.

**Get a Quote** is where you can start to process **Dental Quotes and Applications**, **Advanced Practice Clinicians Quotes**, and **Quote Estimate for Physicians and Surgeons**.

**Referral Link** is where you can find the advanced practice clinicians (APCs) referral link. You are able to copy and paste the link to provide to a prospect APC.

**View Quotes and Applications for Dentists** will take you to the listing of your dental quotes and applications. After clicking, **View Quotes and Applications for Dentists,** you can access the **Dental Referral Link** from the top menu. You can copy and paste the link to provide to a prospect dentist.

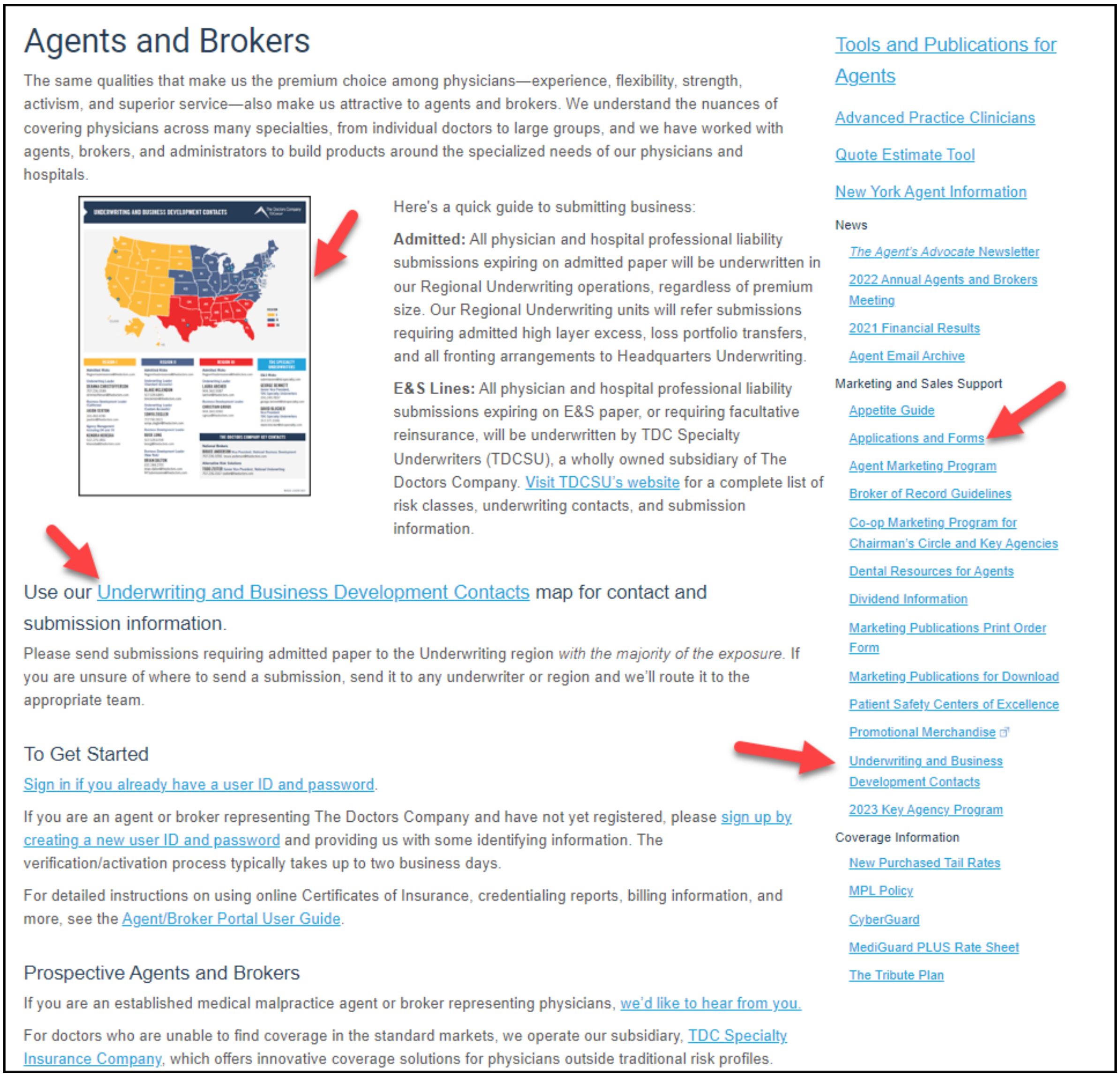



**View Quotes and Applications** will take you to the listing of your **Quote Estimate for Physicians and Surgeons** and well as **Advanced Practice Clinician Quotes and Applications**.

For more information, contact Agency Support by sending an email to agencysupport@thedoctors.com or by calling 800.421.2368, extension 1391.

# Tools and Publications


Click **Tools and Publications** to see the *Agents and Brokers* screen with access to all the *Tools and Publications* resources. You can access many resources including application forms, marketing materials, and the *Underwriting and Business Development Contacts* sheet.



## Agents and Brokers

The same qualities that make us the premium choice among physicians—experience, flexibility, strength, activism, and superior service—also make us attractive to agents and brokers. We understand the nuances of covering physicians across many specialties, from individual doctors to large groups, and we have worked with agents, brokers, and administrators to build products around the specialized needs of our physicians and hospitals.

Here's a quick guide to submitting business:

**Admitted:** All physician and hospital professional liability submissions expiring on admitted paper will be underwritten in our Regional Underwriting operations, regardless of premium size. Our Regional Underwriting units will refer submissions requiring admitted high layer excess, loss portfolio transfers, and all fronting arrangements to Headquarters Underwriting.

**E&S Lines:** All physician and hospital professional liability submissions expiring on E&S paper, or requiring facultative reinsurance, will be underwritten by TDC Specialty Underwriters (TDCSU), a wholly owned subsidiary of The Doctors Company. Visit TDCSU's website for a complete list of risk classes, underwriting contacts, and submission information.

Use our Underwriting and Business Development Contacts map for contact and submission information.

Please send submissions requiring admitted paper to the Underwriting region *with the majority of the exposure*. If you are unsure of where to send a submission, send it to any underwriter or region and we'll route it to the appropriate team.

### To Get Started

Sign in if you already have a user ID and password.

If you are an agent or broker representing The Doctors Company and have not yet registered, please sign up by creating a new user ID and password and providing us with some identifying information. The verification/activation process typically takes up to two business days.

For detailed instructions on using online Certificates of Insurance, credentialing reports, billing information, and more, see the Agent/Broker Portal User Guide.

### Prospective Agents and Brokers

If you are an established medical malpractice agent or broker representing physicians, we'd like to hear from you.

For doctors who are unable to find coverage in the standard markets, we operate our subsidiary, TDC Specialty Insurance Company, which offers innovative coverage solutions for physicians outside traditional risk profiles.

Tools and Publications for Agents

- Advanced Practice Clinicians
- Quote Estimate Tool
- New York Agent Information

News

- *The Agent's Advocate* Newsletter
- 2022 Annual Agents and Brokers Meeting
- 2021 Financial Results
- Agent Email Archive

Marketing and Sales Support

- Appetite Guide
- Applications and Forms
- Agent Marketing Program
- Broker of Record Guidelines
- Co-op Marketing Program for Chairman's Circle and Key Agencies
- Dental Resources for Agents
- Dividend Information
- Marketing Publications Print Order Form
- Marketing Publications for Download
- Patient Safety Centers of Excellence
- Promotional Merchandise
- Underwriting and Business Development Contacts
- 2023 Key Agency Program

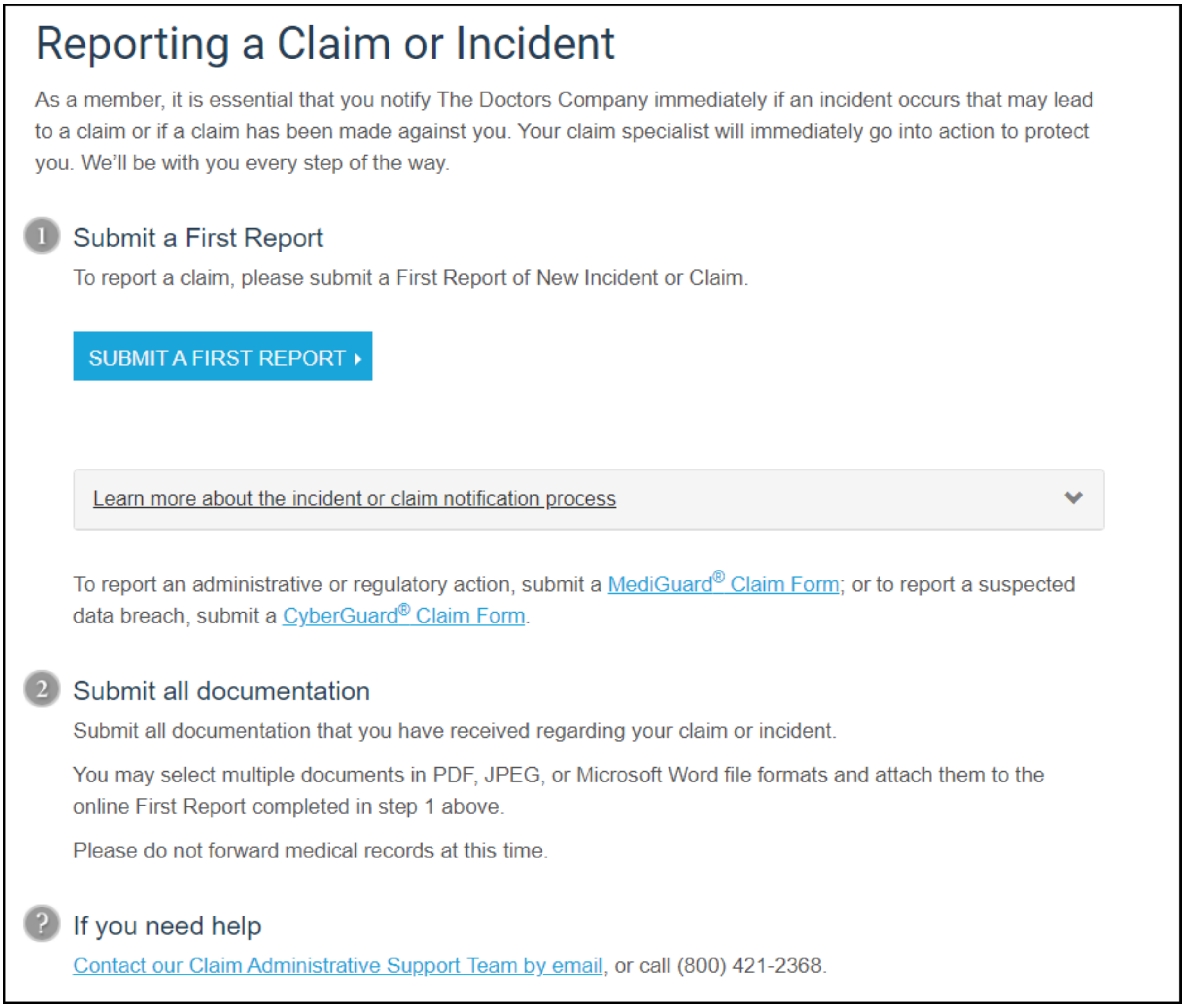
Coverage Information

- New Purchased Tail Rates
- MPL Policy
- CyberGuard
- MediGuard PLUS Rate Sheet
- The Tribute Plan

## Report a Claim - Report a Claim

From the main dashboard of the Agent/Broker Portal, at the top right, click **Report a Claim**.


You will be able to report a claim with the steps outlined below.



# Reporting a Claim or Incident

As a member, it is essential that you notify The Doctors Company immediately if an incident occurs that may lead to a claim or if a claim has been made against you. Your claim specialist will immediately go into action to protect you. We'll be with you every step of the way.

1 Submit a First Report

To report a claim, please submit a First Report of New Incident or Claim.

SUBMIT A FIRST REPORT ▸

Learn more about the incident or claim notification process

To report an administrative or regulatory action, submit a MediGuard® Claim Form; or to report a suspected data breach, submit a CyberGuard® Claim Form.

2 Submit all documentation

Submit all documentation that you have received regarding your claim or incident.

You may select multiple documents in PDF, JPEG, or Microsoft Word file formats and attach them to the online First Report completed in step 1 above.

Please do not forward medical records at this time.

? If you need help

Contact our Claim Administrative Support Team by email, or call (800) 421-2368.

## Agency Support Assistance

Thank you for reviewing our *Agent/Broker Portal User Guide*. For overall questions, or to provide feedback, contact Agency Support at agencysupport@thedoctors.com or 800.421.2368, extension 1391. If you would like personalized training for your agency, you can schedule training, which will occur via a Microsoft Teams session.