



PHLY USER GUIDE

MyPHLY REGISTRATION PROCESS

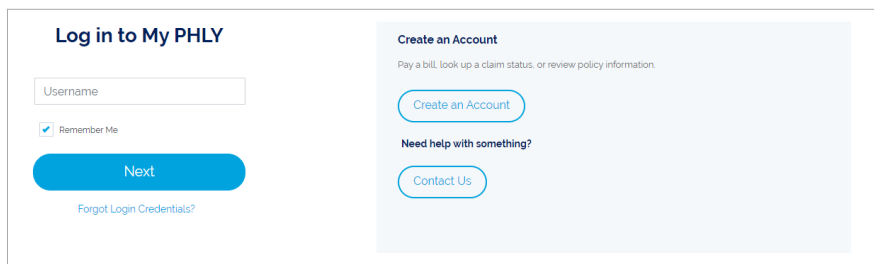
PLEASE NOTE THAT THROUGHOUT THIS GUIDE THERE MAY BE MORE THAN ONE METHOD TO ACCESS THE SAME INFORMATION.

HOW TO ACCESS MYPHLY

1. Click "Log in / Register" button from the PHLY.com home page.

Log in / Register 

2. Enter your Username then click Next button if you have a PHLY.com username registered.
3. If you need to register, click Create an Account button.



The screenshot shows the 'Log in to My PHLY' section on the left and the 'Create an Account' section on the right. The login section includes a 'Username' input field, a 'Remember Me' checkbox, a 'Next' button, and a 'Forgot Login Credentials?' link. The registration section includes a 'Create an Account' button and a 'Need help with something? Contact Us' link.

REGISTRATION

This website was created for Philadelphia Insurance Companies producers and policyholders. Unauthorized access to this website is prohibited. Only you may use the username you created. You are responsible for all activities using your username ID. Producers - by creating and using an ID, you verify that you are authorized by your employer to access the information on this website.

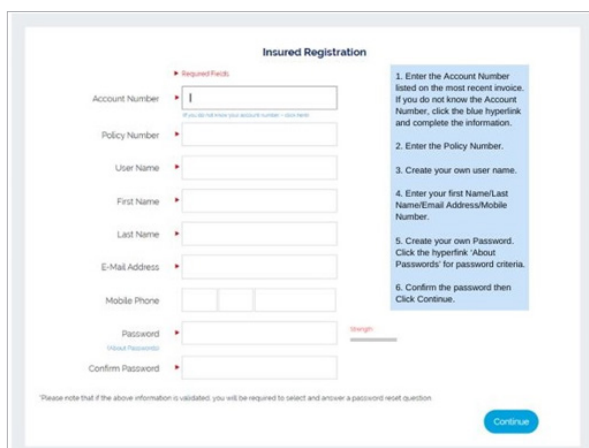
HOW TO REGISTER A USERNAME:

1. Click the Login/Register button from PHLY.com home page.
2. Click Create an Account.
3. Click Insured for the type of account you are registering.

Choose the type of account you will need to create.

- ☒ Insured (Purchases insurance products)
☐ Producer (Sells insurance products)

4. Fill in the required information and click the Continue button.



The screenshot shows the 'Insured Registration' form with the following fields: Account Number, Policy Number, User Name, First Name, Last Name, E-Mail Address, Mobile Phone, Password, and Confirm Password. A 'Continue' button is at the bottom right. A 'Required Fields' list is on the right side of the form.

Password Criteria

Password must meet All of the following criteria to be accepted:

- A minimum of 7 characters
- Contain one or more capital letters (A-Z)
- Contain one or more lowercase letters (a-z)
- Contain one or more numbers (0-9)

Example:

Username: JoeSmith

password: Smith5869 or JoeSmith123 will not work

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VERIFY YOUR ACCOUNT:

After clicking Continue on your MyPHLY registration form, you will be sent a PIN for multi-factor authentication purposes. You may also need to verify the PIN when resetting your password.

You will have the option to send the PIN to your mobile phone or email. We highly suggest your mobile phone for a faster verification process.

VERIFY YOUR ACCOUNT

You will be required to verify the account by having a PIN sent to either your email address or mobile phone number. Select the method to receive your PIN. Once received, enter it in the field. **Please note: that email can get blocked by firewalls or marked as spam. Receiving the PIN via text is more reliable.**

Step 1: How Should We Contact You?

☐ Email Address ☒ Text Message
Standard Phone and SMS Charges May Apply

Step 2: Verify Your PIN

Please type the PIN you received here:

USERNAME REQUEST:

1. Click the Login/Register Button on PHLY.com home page.
2. Click Forgot Password/Username.
3. Enter the Email Address associated with PHLY.com account and click submit.

USERNAME REQUEST

To retrieve your username please enter the e-mail address associated with your Phly.com account and select "Submit". If the e-mail address entered matches an account in our system we will send an e-mail message containing your username.

E-mail Address

Submit Cancel

PASSWORD RESET REQUEST:

1. Click Forgot Password/Username.
2. Enter your Username and Email Address associated with your PHLY.com account and click submit.

PASSWORD RESET REQUEST

To reset your password, please enter your username and the e-mail address associated with your Phly.com account. If the information you entered matches that of an account in our system, we will send an e-mail message containing instructions on how to reset your password.

Username

E-mail Address

Submit Cancel

PASSWORD RESET QUESTION

After the PIN has been verified, the password reset page will be presented. Please re-enter the password you just created and set up a password reset question. If you forget your password, we will ask you this security question and you will enter the answer you have selected. Please note that your answer is case sensitive. When registration has been completed, you will be directed to **Continue to MyPHLY**.

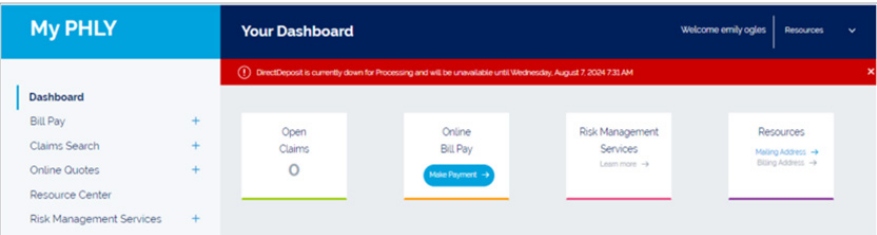
✔ Your question and answer were successfully saved.

[Continue to MyPhly](#)

MyPHLY REGISTRATION PROCESS

MyPHLY.COM DASHBOARD:

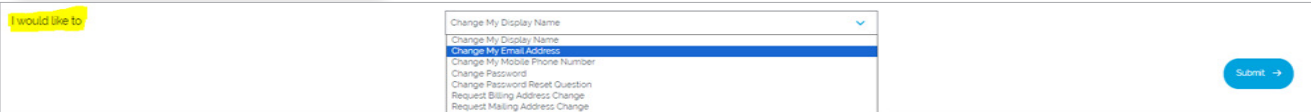
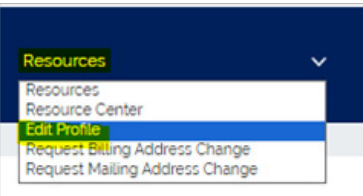
Click on the Dashboard Left Navigation Menu to access: Bill Pay, Claims Search, Online Quotes, Resource Center, Risk Management Services and FAQ. Please note any notification or update banners may appear at the top, periodically.



RESOURCES

You can change your Display Name, Email Address, Phone Number, Password, Password Reset Question, Address Change, Remove MyPHLY Accounts and access our Training Manual.

1. Click Resources drop-down.
2. Click Edit Profile.
3. Click I would like to drop-down to select the change you would like to submit.



POLICIES & BONDS

On the dashboard, in the middle of the page, you will see a list of Active and Expired policies. Click the Blue Policy number link, to access the Policy Summary Screen.



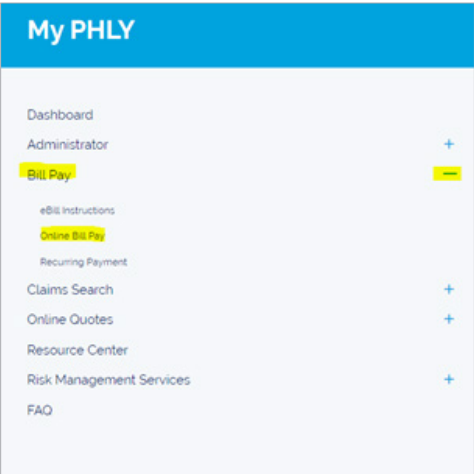
Policy Summary page will contain:

- Policy documents that can be downloaded
- Policy Coverages
- Billing and Payment History
- Policy Installment Plan Information

MyPHLY REGISTRATION PROCESS

HOW TO MAKE A PAYMENT:

- 1. Click + sign next to Bill Pay to expand section.
- 2. Click Online Bill Pay.



- 3. Choose How you would like to Pay-ACH or Credit Card.

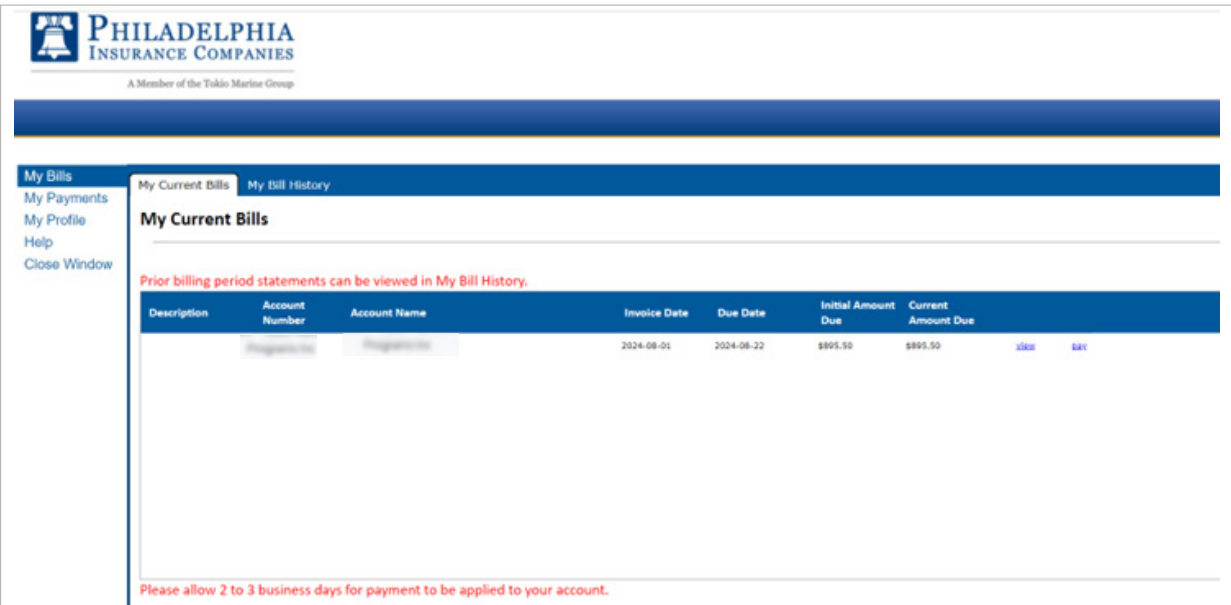
ACH/ Checking Account Payments:

- 1. Click 'Bill Pay' or 'Online Bill Pay.' Select 'ACH.' A new web browser will open, so you will want to ensure that your pop-up blocker is disabled.
- 2. You will start on the 'My Bills' tab. To make a payment there must be an invoice listed here.
- 3. To the right of the invoice information is a link to view the invoice as a PDF or 'Pay.' The pay button will take you to the payment portal for a one-time payment.

Recurring Payments with ACH

- 1. Click 'Bill Pay' or 'Make Payment.' Select 'ACH.' A new web browser will open, so you will want to ensure that your pop-up blocker is disabled.
- 2. On the left, click 'My Payments' to take you to the recurring payments tab.
- 3. Click 'Add Bank Account' on the top right and enter your checking or savings account information.
- 4. Next, click the 'Recurring Payments' tab on the top to add your bank account to a recurring payment schedule. To do this, click 'add' to the right of your account.
- 5. Please note, you may edit this information at any time and for any reason.

IMPORTANT All recurring payments will only pay future invoices. For example, if an invoice is sent on 12/01 and you set your recurring payments up on 12/05, the payment will not be automatically deducted. The first invoice to be automatically paid will be any invoices issued after 12/05.



MyPHLY REGISTRATION PROCESS

HOW TO MAKE A PAYMENT - *continued*

Credit Card:

To cover the cost of credit card acceptance, we pass on a 3.0% credit card fee except in MA, CT and RI. This fee is not more than the cost of accepting these cards. There is no fee for debit cards.

1. Click 'Bill Pay' then 'Online Bill Pay.' Select 'Credit Card' > A new web browser will open, so you will want to ensure that your pop-up blocker is disabled.
2. You will start on your account tab. Select 'Payments' on the top right, then select 'Invoices.'
3. On the left-hand side, check the box next to the invoice you would like to pay.
4. On the right-hand side, select 'Pay Now.'
5. This will now bring you into your payment screen. Select 'Add & Pay' to add a credit card or if you have a previous credit card stored, you can use the drop down to select the card you would like to use.
6. The payment pop-up will appear, enter or confirm your credit card information then select 'Pay' at the bottom of the screen. Once your payment has processed, you will receive a green check.

Pay Now											
Customer ID		Company Code		USD		Total Invoices		Total Open Amount		Total Amount To Pay	
[blurred]		MAGUIRE - MAGUIRE		USD		1		84.00		84.00	
<input checked="" type="checkbox"/>	Invoice Number	Reference Doc Number	Invoice Type	Line Number	Current Open Amount	Currency	Description	Amount To Pay	Remarks	Reason Code	
<input checked="" type="checkbox"/>	2007226145		BC	1	84.00	USD		84.00		--Select a Reason Code--	
Payment Method *											
Add & Pay											

You can adjust the amount to pay, if it is under the amount due. Adjustments can be made when paying with Desktop view.

Recurring Payments with Credit Card

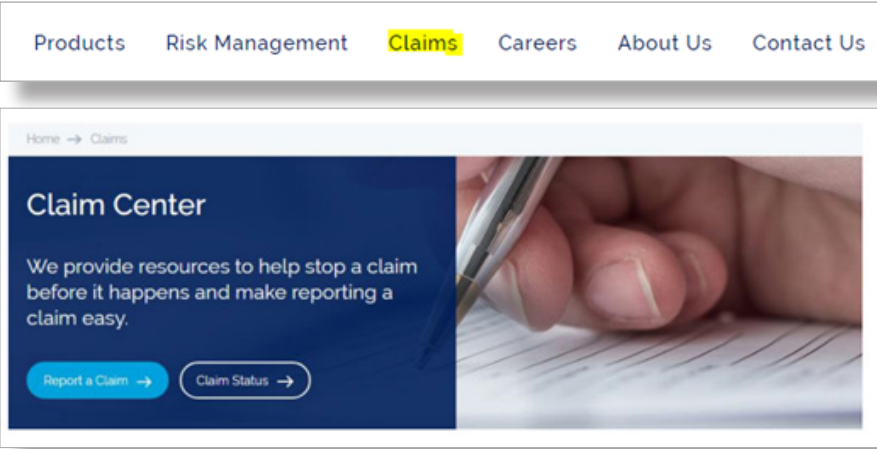
7. Click 'Bill Pay' or 'Make Payment.' Select 'Credit Card' > A new web browser will open, so you will want to ensure that your pop-up blocker is disabled.
8. You will start on your account tab. Select 'Payments' on the top right, then select 'AutoPay'.
9. This will open your AutoPay screen. Select the box for 'Accept AutoPay Terms in Conditions' on the right side of the screen. A pop up with the Terms and Conditions will show. Select 'Ok.'
10. On the left-hand side of the screen, you will select 'Add & Submit'. You will now have a white box that will populate, to add your credit or debit card information.
11. Once the payment method has been added, you will select 'Submit' on the right side of the screen.
12. The next page, you will confirm the information that you entered. On the bottom left of the screen, you must select the box to 'Save Payment Method for Future Use.' If this is not completed, you will not be able to set up for 'AutoPay'. Select 'Continue'.

You will not be brought back to the AutoPay screen. You will have a green banner at the top of the page showing 'AutoPay setup completed successfully.'

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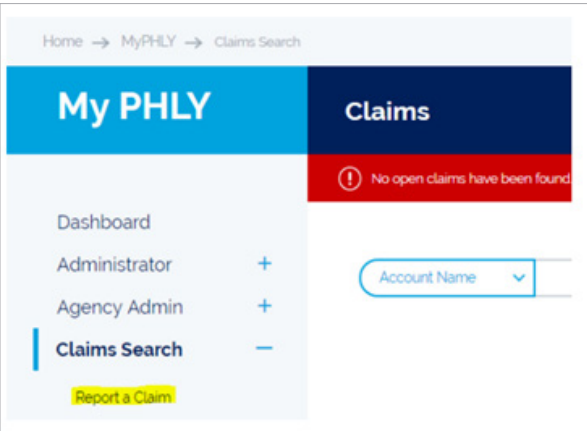
HOW TO REPORT A CLAIM:

- 1. On the Top Navigation Menu- Click Claims
- 2. Click Report a Claim



OR

- 1. When logged into PHLY.com, Click Claims Search on Left Navigation Menu.
- 2. Click Report a Claim.



SAMPLE CLAIMS REQUEST FORM:

Claims

Auto

General Liability

Property

Mgmt and Prof Liability

Restoration/Reconstruction Contractors

Surety

Auto Report Claim

Report a Claim

By using this service, you can expedite the handling of your claim. After you complete the notice, it is sent electronically to the appropriate claims department personnel, who will contact you within 24 hours. For more information visit the [Claim Notification Center](#).

Auto

Progress 1 2 3 4 5 6 7

Contact Information

Name of Person to Contact

Example Text

Email Address of Person to Contact

example@phly.com

Phone Number of Person to Contact

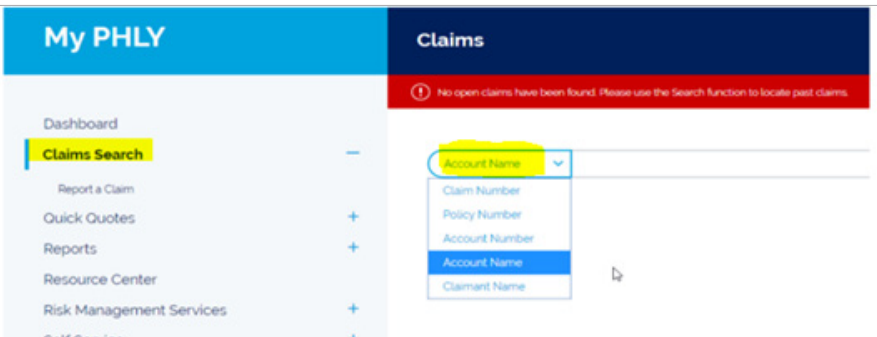
808 544 3547

Person Reporting Claim

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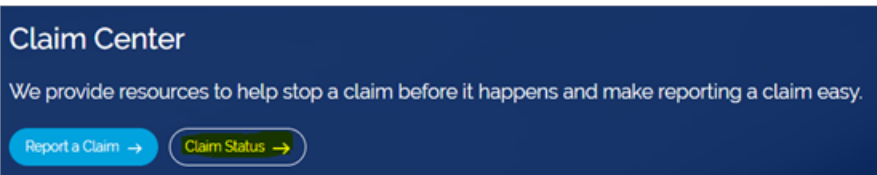
HOW TO CHECK ON CLAIMS STATUS:

1. Click Claims Search on Left Navigation Menu.
2. Use Search filters to search for claim by the Claim Number, Policy Number, Account Number, Account Name or Claimant Name.



OR

1. You can send us a claims inquiry or message via email by Click Claims at the Top Navigation Menu.
2. Click Claims Status button.

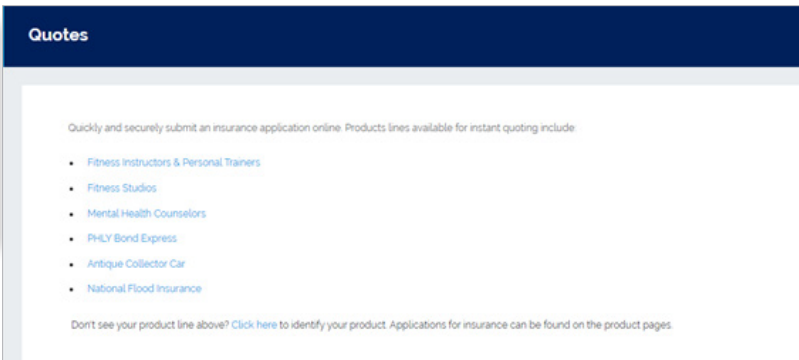
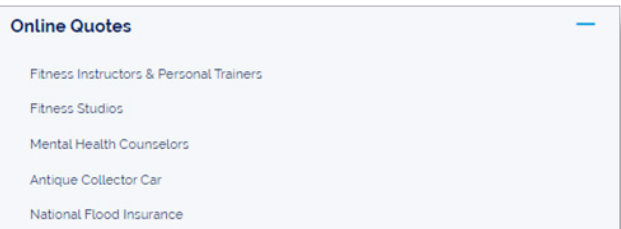


3. Fill out the Claims Inquiry form with all the required information.

A screenshot of the 'Claim Inquiry Form'. The form is titled 'Claim Inquiry Form' and includes a sub-header 'Contact Information'. The form fields are organized into sections: 'Contact Information' (Name, Address, Phone), 'Claim' (Inquired Claim Number, Reference Number, Policy Number, Insured Last Name, Insured First Name, Spouse Name), and 'Inquiry' (Subject, Message). The form is designed to collect detailed information about a claim inquiry.

ONLINE QUOTES:

1. From the Left Navigation Menu, click + sign to the right of Online Quotes.
2. Click on one of the available Quick links for an application.

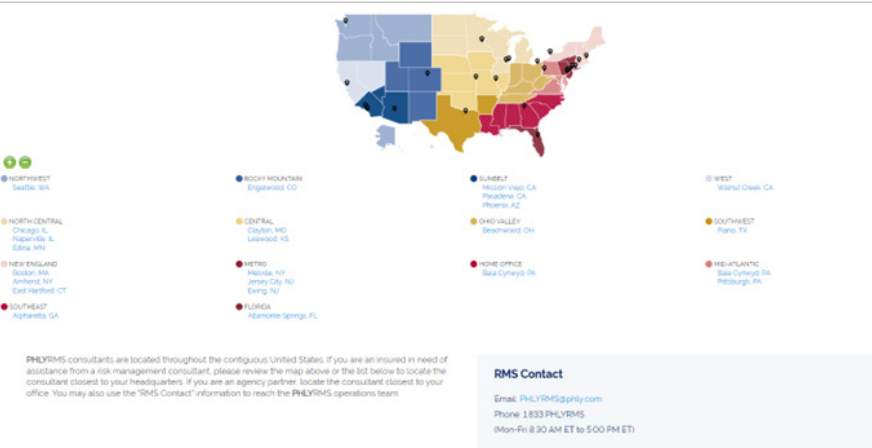


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RISK MANAGEMENT SERVICES:

From the Dashboard, Click Risk Management Services to View all the services available to Insureds. A variety of risk management services can be utilized to reduce business losses. Offerings include access to Risk Management Programs, educational e-Flyers, and information on large claim loss lessons learned.

Click Contact RMS to view the Risk Management offices and contact information.

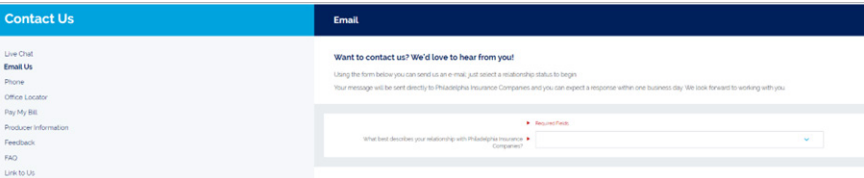


STILL HAVING TROUBLE NAVIGATING PHLY.COM?

Visit the FAQ's section of the dashboard.

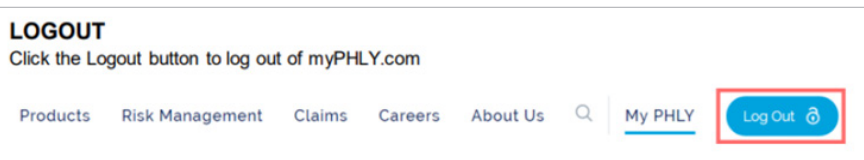


Click Contact Us- available at the top right of PHLY.com.



TO LOGOUT:

1. Click blue Log Out button, to the top right of PHLY.com page.



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