

It is important to us to be there when you need us! Our website now offers you the ability to view your policy information online anytime, from any computer with Internet access! You have been provided with a Login ID and Password to keep your information secure.

**NOTE:** Please have your IT staff add this information to their "Safe List": Mail-Server@csr24.email and 162.42.193.9

Using our **24/7 Access**, you can:

- ❖ Print and send Certificates of Insurances
- ❖ Process Certificate Renewals
- ❖ Print out Certificate Holder Spreadsheets

To take advantage of our 24/7 Online Customer Access, visit our Website at:  
[www.bch-insurance.com](http://www.bch-insurance.com)

- 1) Click on <https://portal.csr24.com/mvc/1993695616>
- 2) Enter your Login ID and password.

**Login ID:**

**Password:**

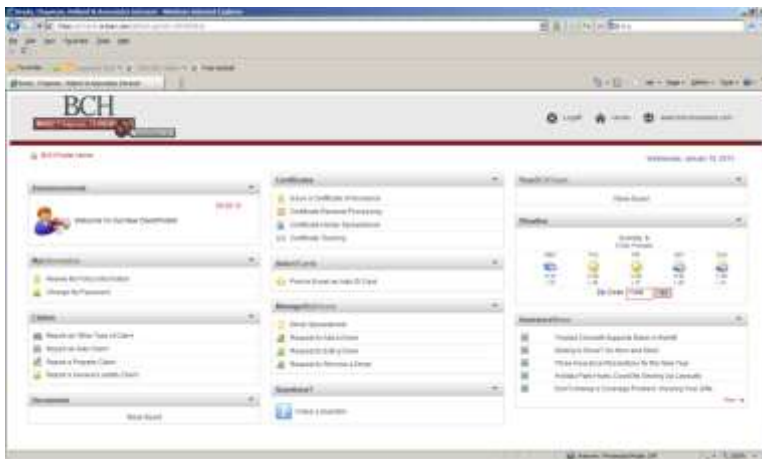


## Certificate of Insurance Instructions

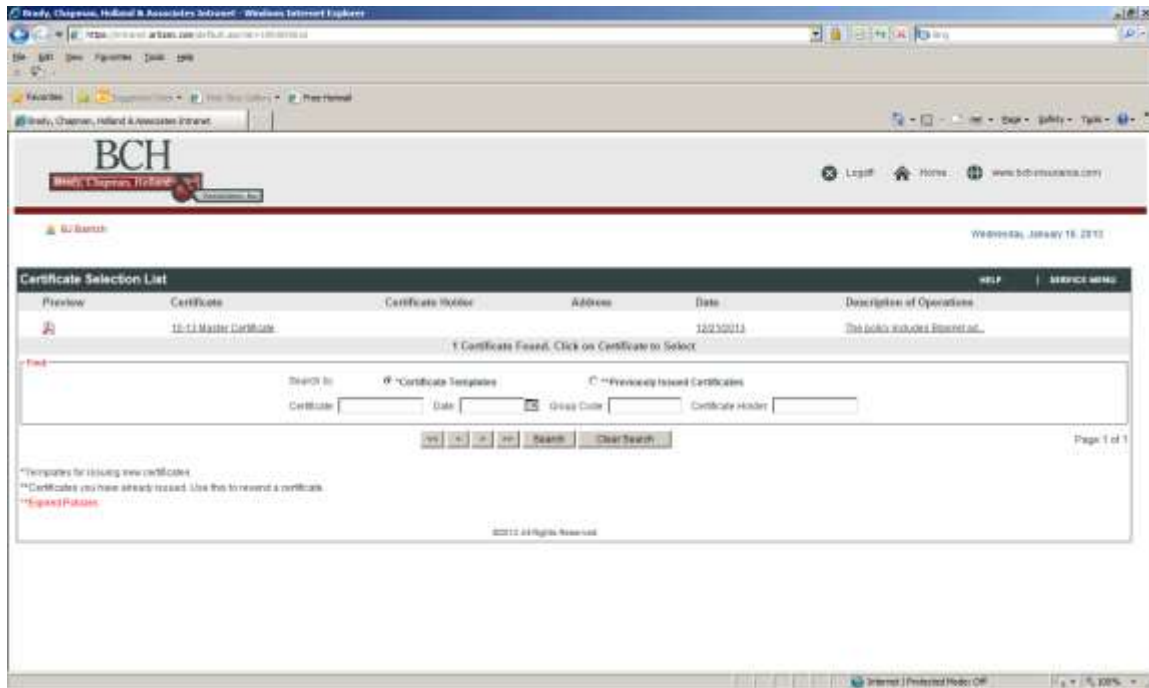
**Step 1:** Click on your shortcut from your desktop. Type in your User ID and Password and click SignOn



**Step 2:** From the Customer Services Menu, click “Issue a Certificate of Insurance”.



**Step 3:** Click on the name of the Certificate you wish to use.  
The Certificate Selection List will display.  
Click on the Certificate you want to issue

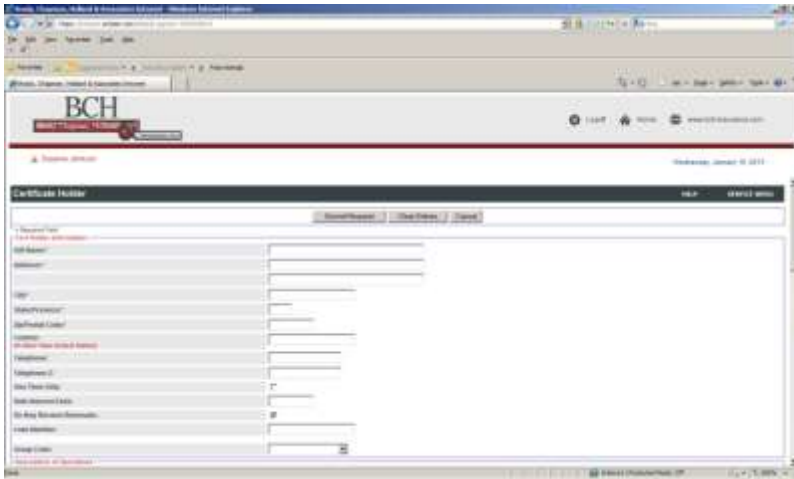


**Step 4:** A view of the Certificate will display to confirm that you have selected the correct Certificate.



**Step 5:** Click on the Add Cert Holder tab –

**Add Certificate Holder Name, Address**



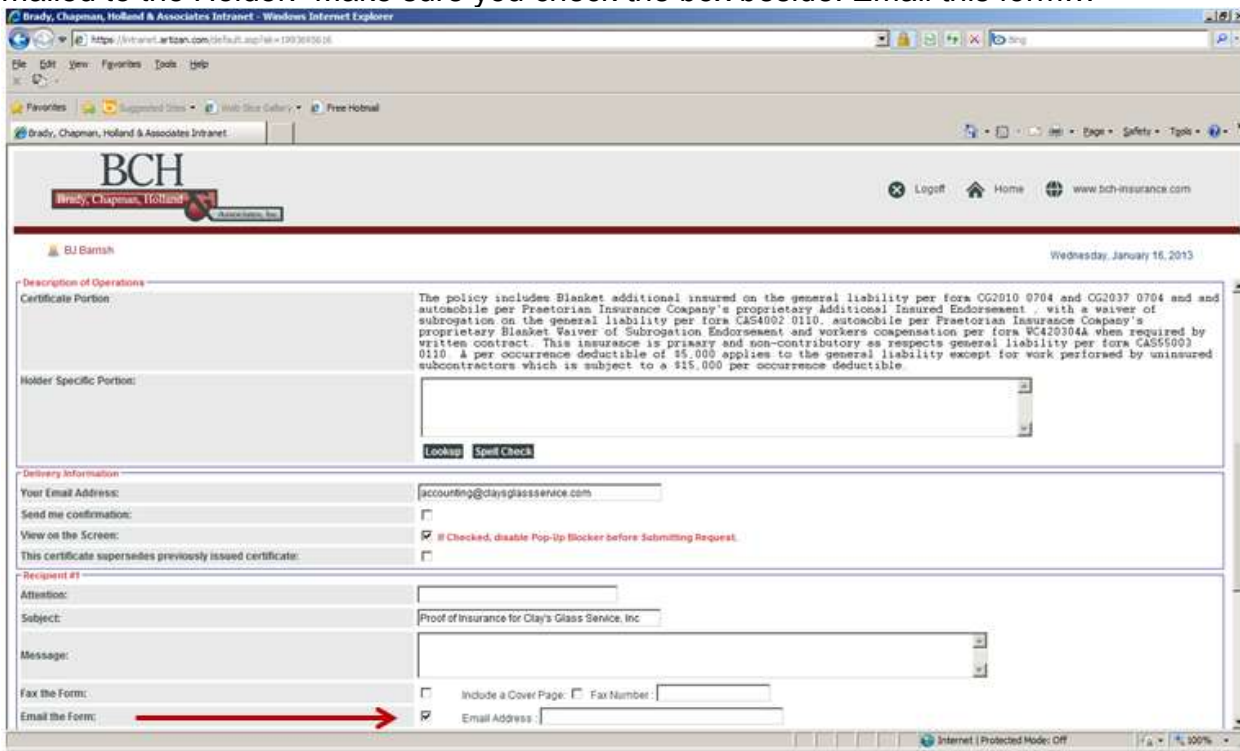
Then scroll down to **DESCRIPTION OF OPERATIONS:**  
 Enter Job Description or Names of All entities to be included on certificate.

**NOTE: YOU CAN ONLY PUT IN JOB DESCRIPTION OR NAMES OF CERTIFICATE HOLDERS , you cannot indicate any specific coverage in the Description**

**Disable Pop-Up Blocker in order to view certificate on screen**

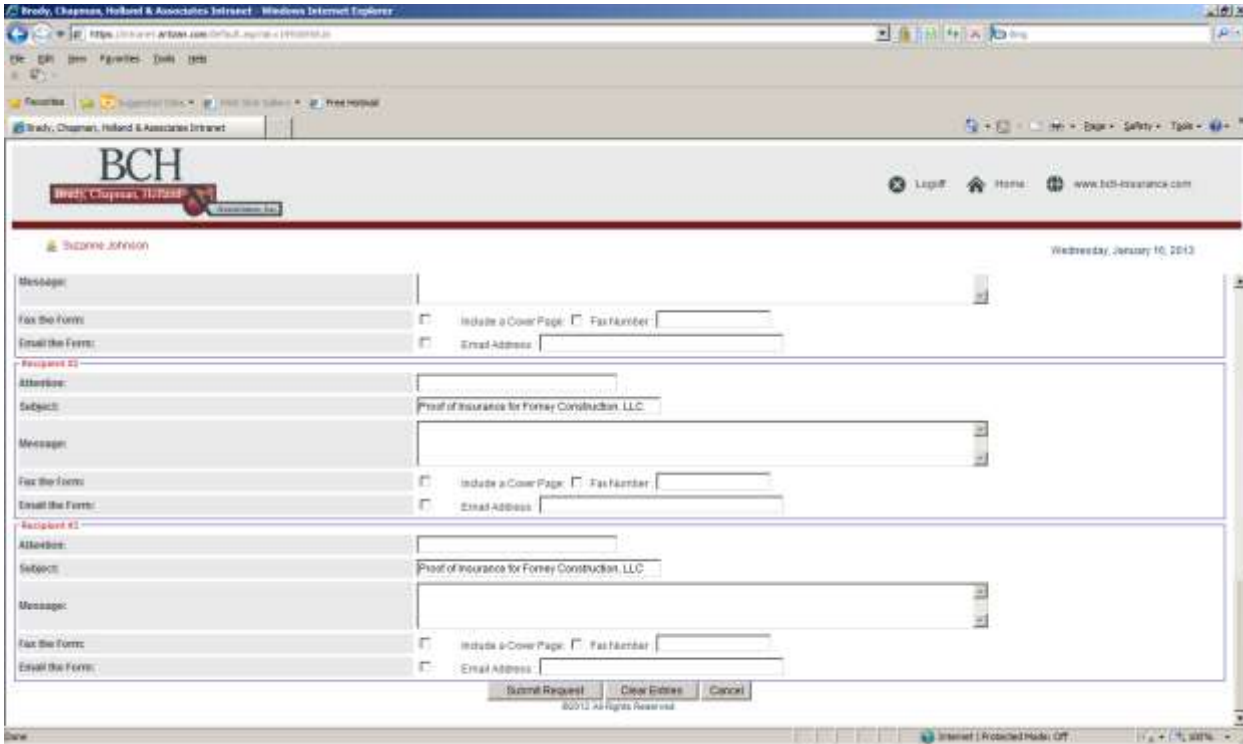
Check – View on Screen, if you need to print a copy of the certificate, before you receive your email copy from the system. Otherwise, you can print when you receive the email copy.

If you enter an email address for Certificate Holder, copy of certificate will be automatically mailed to the Holder. Make sure you check the box beside: Email this form...



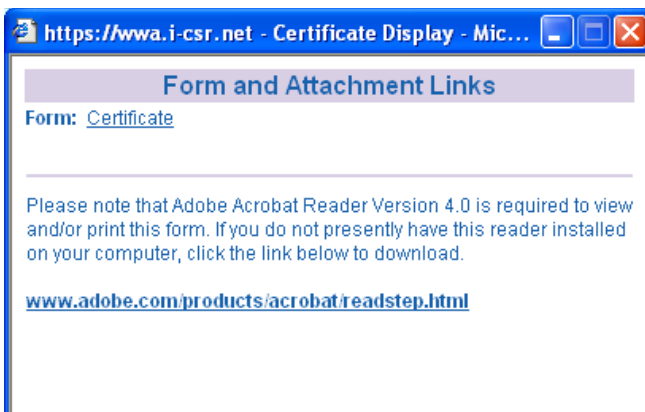


**Step 6:** Enter your Recipient information – when finished – click the “Submit Request” at bottom of screen



Click “Submit Request”.

Then you’ll receive the next screen



**Click on Form: Certificate**

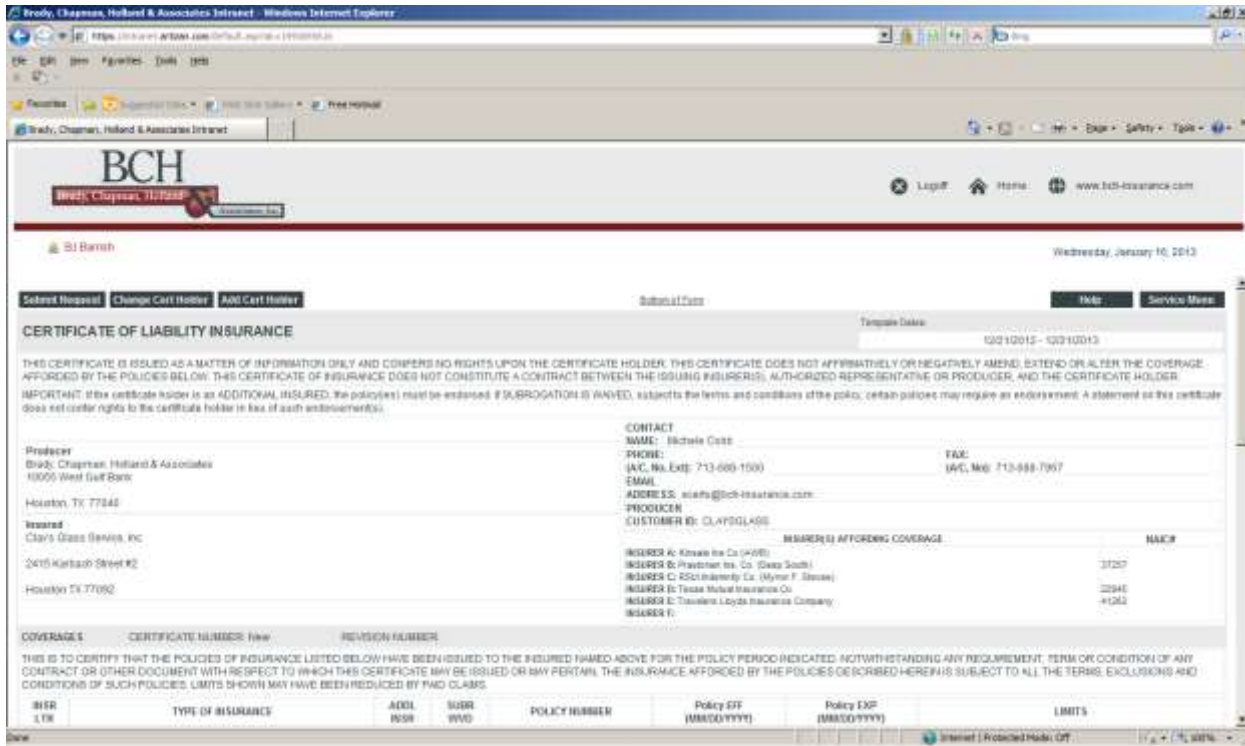
You will see the certificate, which you can print if needed so you can mail or fax.

If you enter an email address for the certificate holder, the system automatically emails a copy of the Certificate to the holder.

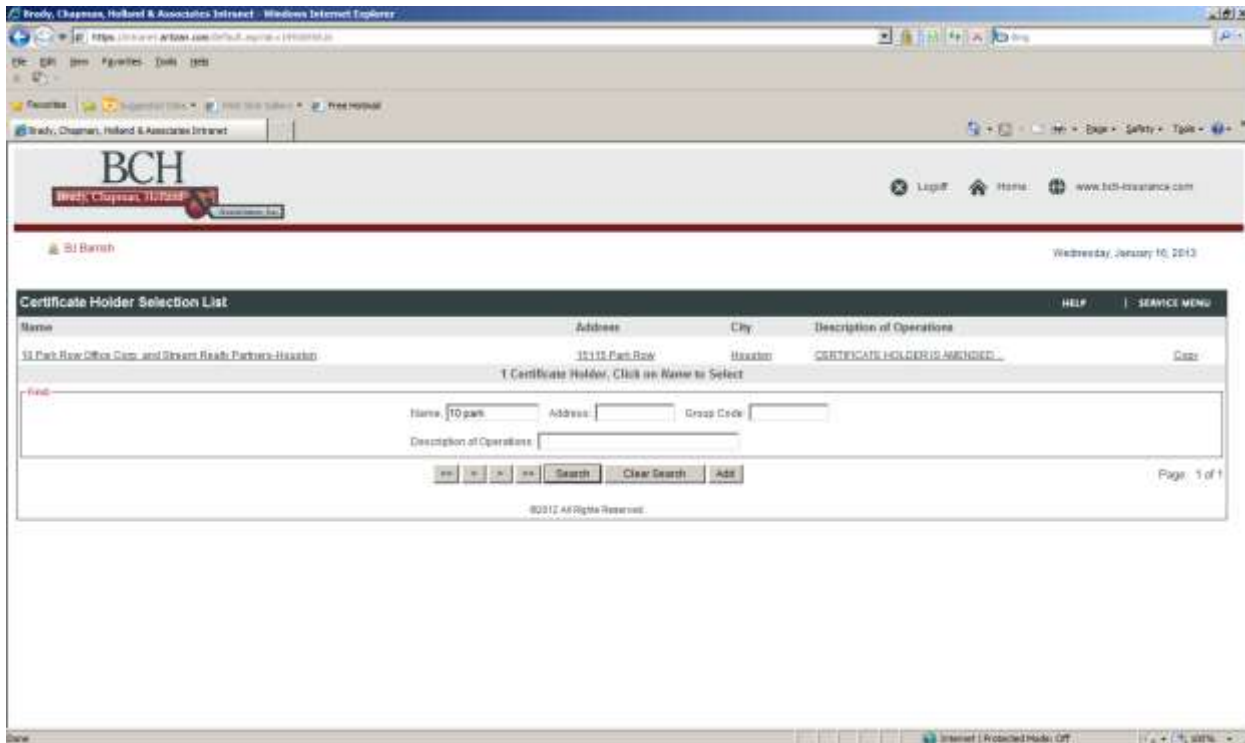
To Copy or duplicate information from an Existing Certificate Holder:

Select Certificate Template needed

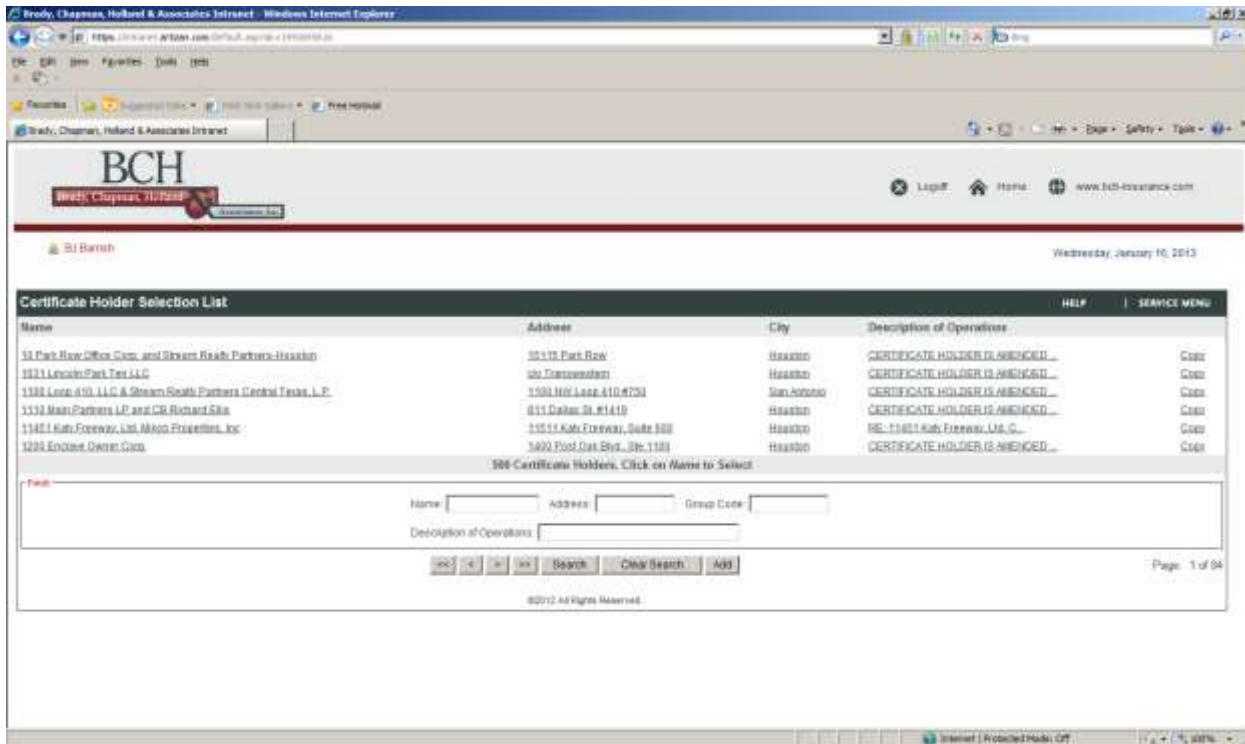
Then Select “SUBMIT REQUEST” tab at the top of screen



After clicking the Submit Request – the system takes you to the existing holder list – type in the search box – the holder we want to copy from. Example below: 10 Park Row Corp – click the Search button



Then click on the **“Copy”** button of the name or location you are looking for this will duplicate the Certificate Holder information and you can amend any information needed. (For Example, if the name of holder, address, etc is OK but you just need to indicate a different **“JOB”** the system has duplicated everything without you having to re-enter the information



You would then click on the **“Submit Request”** at the bottom of Holder screen



## **Reprint or Resend a Previously Issued Certificate of Insurance**

- 1) Select “Certificates of Insurance” from the Service Menu.
- 2) Check the radio button "Previously Issued Certificates" in the Find section of the Certificate selection list.
- 3) From the list of previously issued Certificates, locate the certificate you are looking for.
- 4) Beside the holder is a preview of the Certificate by clicking on the Preview acrobat icon.
- 5) If you need to Resend – then click on the Holder name - Click “Submit Request” on the top left of the screen.
- 6) Update the delivery information if necessary. Please read popup blocker information below.
- 7) Click “Submit request”.

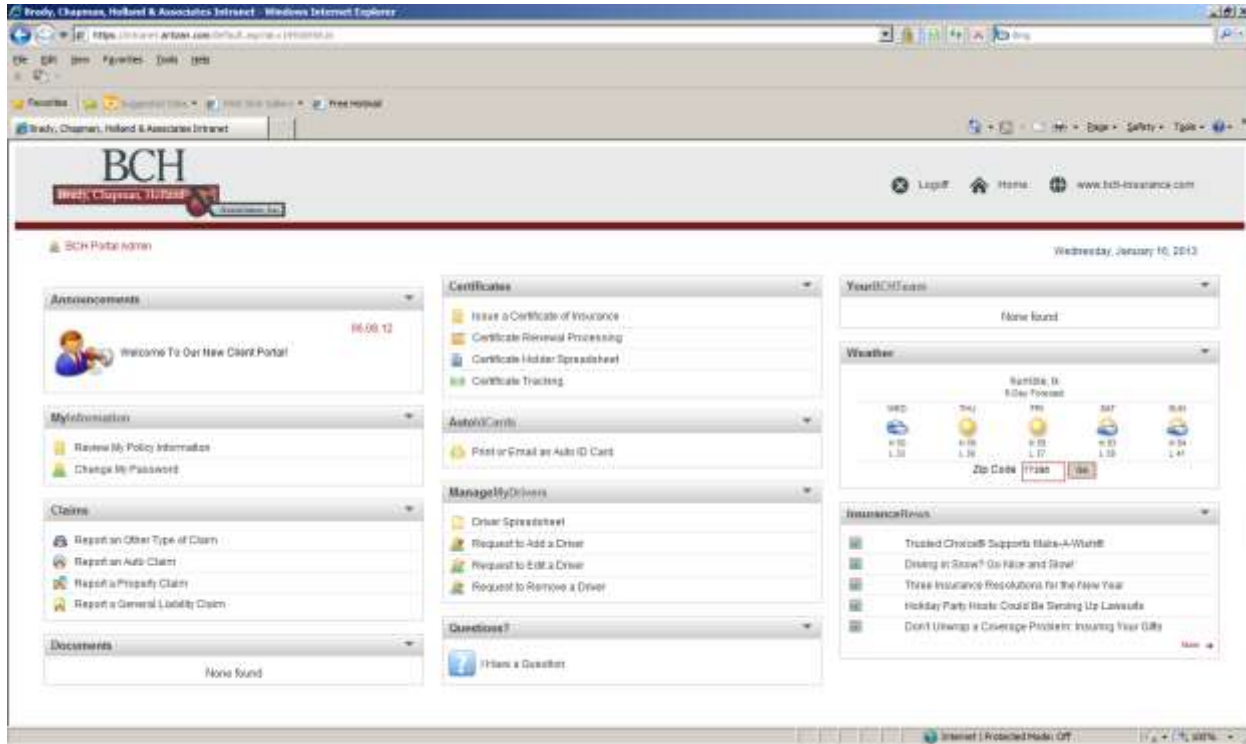
The Certificate will automatically be sent to all recipients entered. Click on the “Certificate” link on the popup box to view a copy of the Certificate.

**Popup Blocker: Please note that if “view on screen” is selected, you need to turn off your popup blocker before selecting “Submit Request”.**

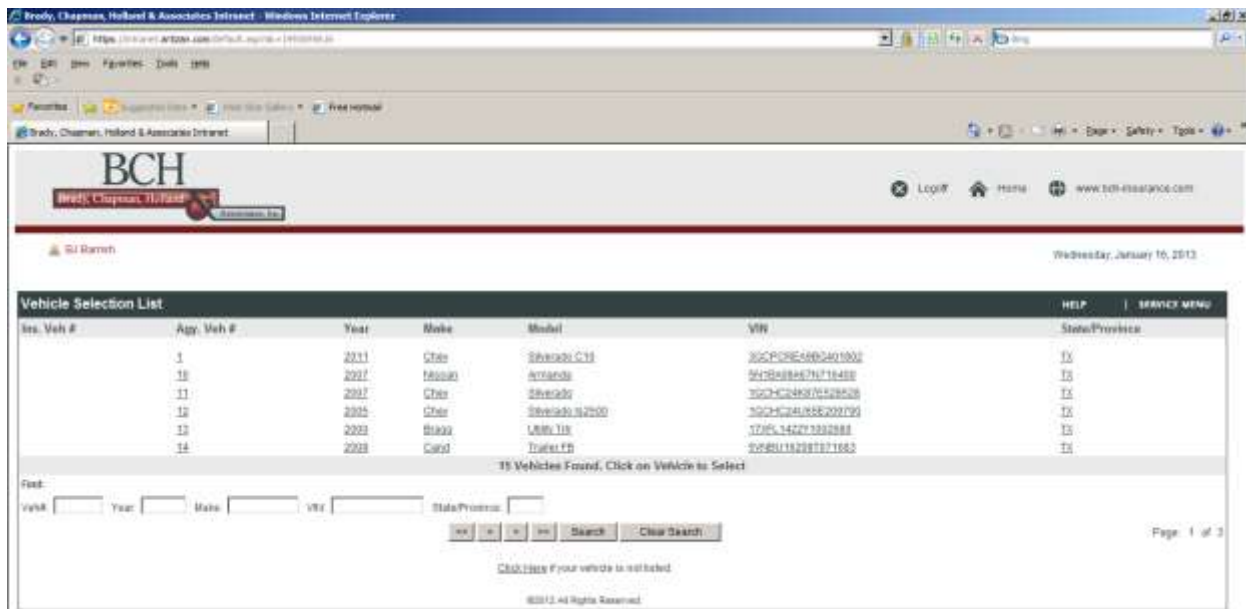
Printing Auto ID cards for existing vehicles on the policy

From the Customer Services Menu

Select “Auto ID Card”

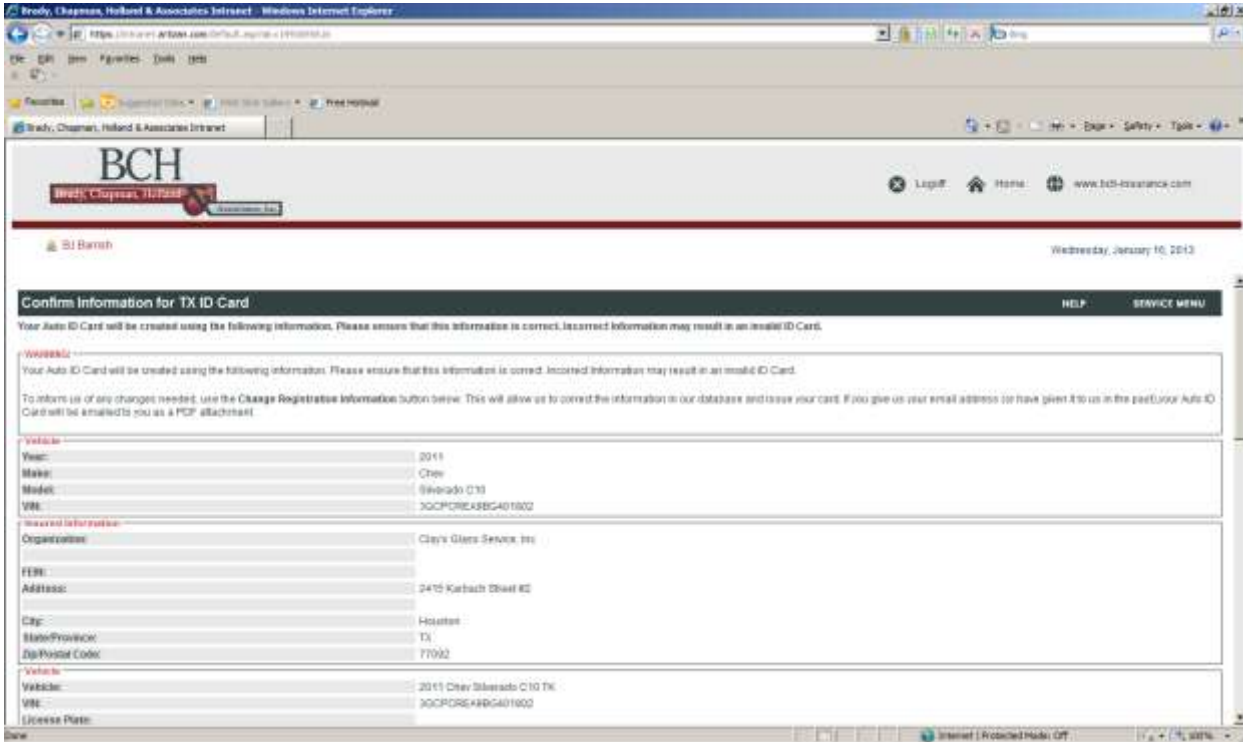


Select vehicle you want to print or In the search boxes type in the Make or the year – this will limit the search so you can locate the vehicle sooner.



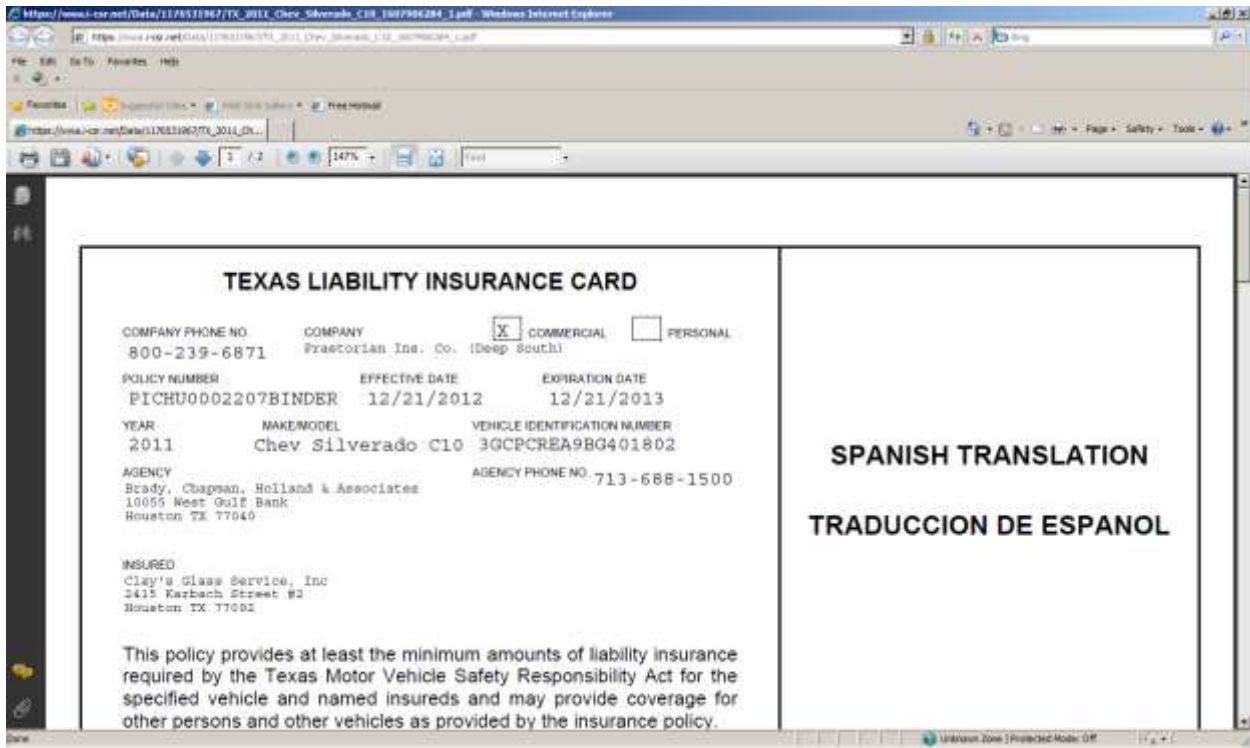
Scroll down to the Delivery Information

Type in the email address where you want this sent to and also check the “View on the Screen” box. After you hit the Submit button it brings up a copy



Remember if you want to email this to others – then finish filling out the additional Recipients

Once finish – scroll down to the bottom of the screen and click Submit Request



Here you can print the document or email yourself the auto id card.

## Request to Add a Vehicle

Add all the information in the fields listed

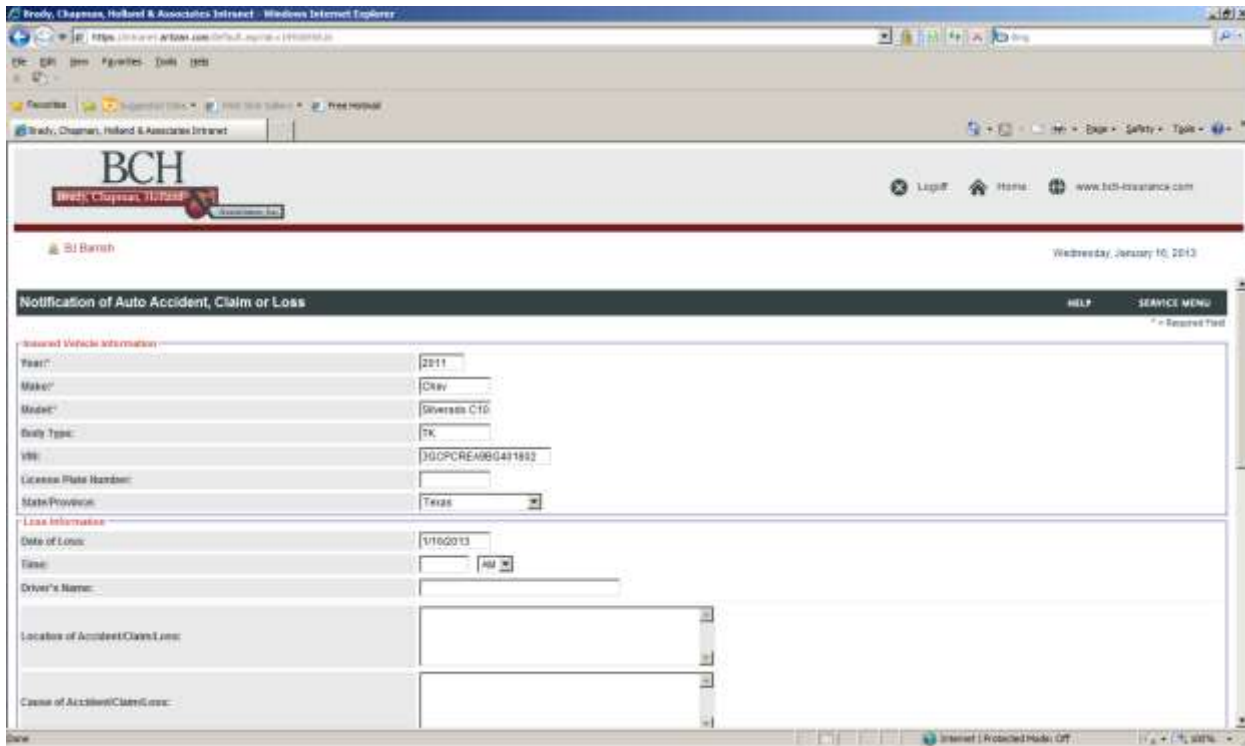
In the **note** section please add the following information:

- Lien holder for the vehicle
- Cost new
- Garage Location
- If a Truck – Gross Weight
- List coverages needed for this vehicle

When you have completed the information click on the “Submit Request” button and the system will send this to BCH to issue.

The screenshot shows a web browser window displaying the BCH website. The page title is "Add Vehicle". The form includes the following fields:

- Effective Date: 1/16/2013
- Vehicle Information section with fields for:
  - Vehicle Number
  - Year
  - Make
  - Model
  - Body Type
  - VIN
  - Rodex Drive
  - GWR/GCW
  - Annual Mileage
  - License Plate Number
  - State/Province: None
  - Cost New
- Primary Cover Information section with a field for Driver: Select



Again you get a confirmation screen – the information has been sent to BCH

**Personal Demo Account** [Close Window](#)

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**Auto ID** [HELP](#) | [SERVICE MENU](#)

**Thank You Jim and Mary Sandle!**  
Your Auto ID request has been submitted successfully.  
Remember that no change is effective until you receive confirmation back from us.

**Reporting Claims using CSR 24 – NOTE: Workers’ Compensation losses can not be reported to CSR 24 – Those must be reported to the Insurance Carrier direct.**

From the Customer Services Menu

Select “Claims” - choose the type of claim you need to report.

- Report an Other Type of Claim
- Report an Auto Claim
- Report a Property Claim
- Report a General Liability Claim

Follow the screens and complete the information – when completed click on the “Submit Loss” button – Again you will receive a confirmation window – letting you know that this has been forwarded to BCH.

The screenshot displays a web browser window with the title "Brody, Chapman, Holland & Associates Internet". The address bar shows "https://bch.com". The page header features the "BCH" logo and the text "Brody, Chapman, Holland & Associates Internet". The main content area is titled "Notification of Auto Accident, Claim or Loss" and contains a form with the following fields:

Vehicle Information	
Year:	2011
Make:	Chrysler
Model:	Silverado CTD
Body Type:	TRK
VIN:	3GCPCEA000411832
License Plate Number:	
State/Province:	Texas

Loss Information	
Date of Loss:	1/16/2013
Time:	
Driver's Name:	
Location of Accident/Claim/Loss:	
Cause of Accident/Claim/Loss:	

**Please remember that if you feel uncomfortable using CSR 24 and would like additional training or need assistance, I am here to help you. If you don't want to use CSR 24, please continue contacting me for assistance.**