

Policyholder Portal Training Guide

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What can be accessed in the Policyholder Portal?

My Policies

- Ability to review all Policy terms
- View Incurred Losses/ Loss Ratio
- Check the status of the account

My Claims

- Allows you to view all claims reported

Document List

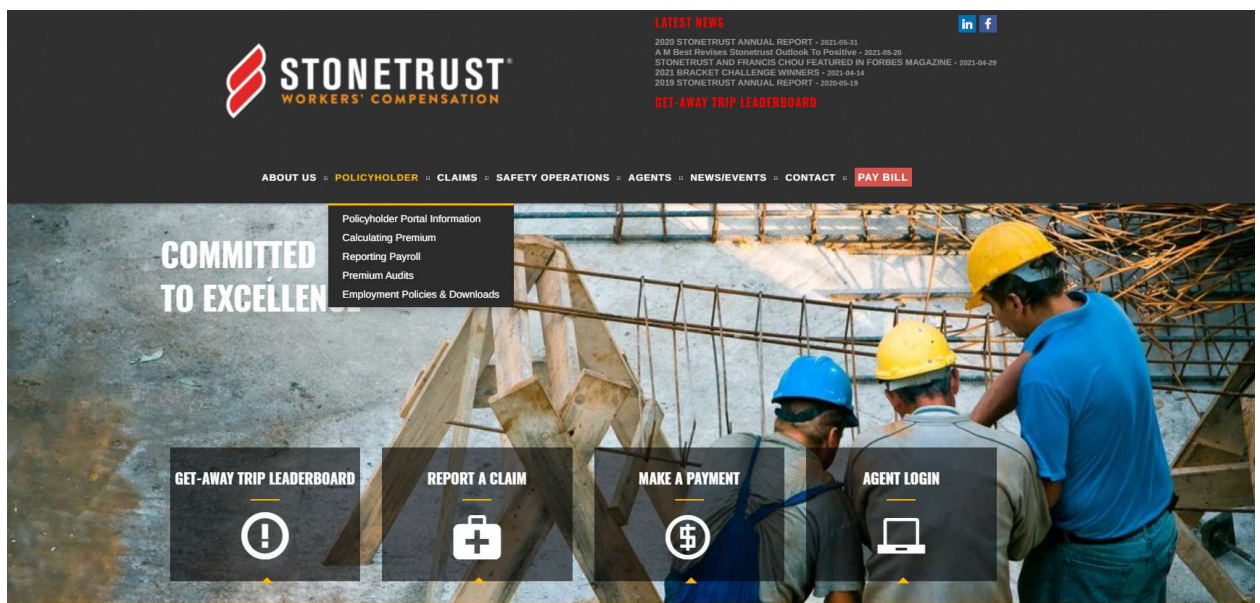
- View and download all Policy documents

I Want To...

- Download a Current Policy
- Report a Claim
- Make a Payment
- Set up on Auto Payment
- Make a one-time Payment
- \$ Report Payroll

Accessing the Portal

- Need access to the Portal? Contact us at service@stonetrustinsurance.com or 800-311-0997.
- Already have access to the Portal? Go to our website <https://www.stonetrustinsurance.com/>
- Hold your cursor over the **POLICYHOLDER** tab then click on “Policyholder Portal Information” to get additional information



- Need to make a payment? Click the box labeled “MAKE A PAYMENT”
- Access the Portal with your Username and Password



Self-Service Web Portal

Log In 

By clicking 'Log in' you signify that you have read, understood, and agreed to the "Terms of Use" and "Privacy Policy"

Forgot your username or password?

[Click here](#) to recover your information.

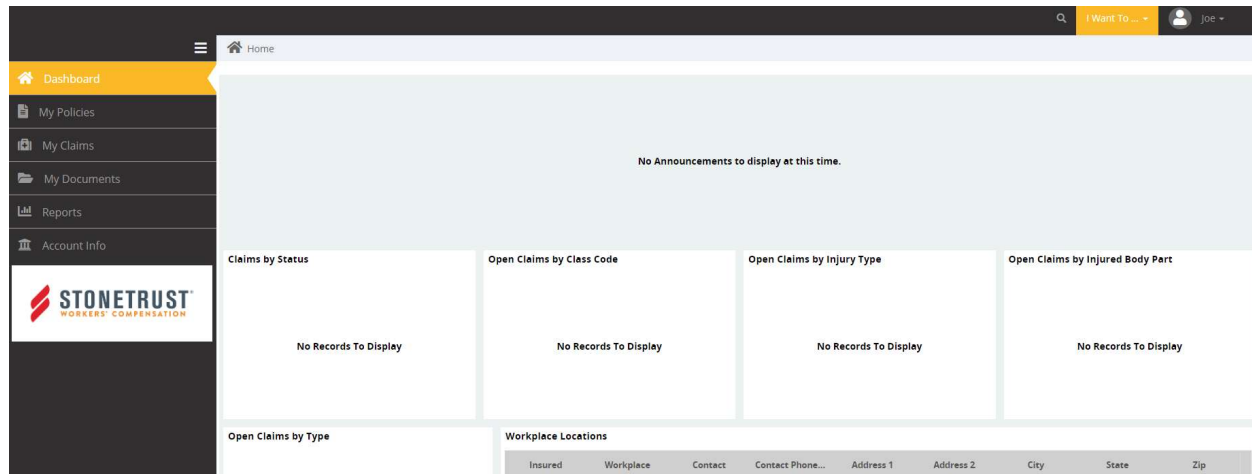
Don't have an account yet?

[Contact us](#) to request an online user account.

[Privacy Policy](#) | [Terms of Use](#)

Stonetrust Commercial Insurance Company

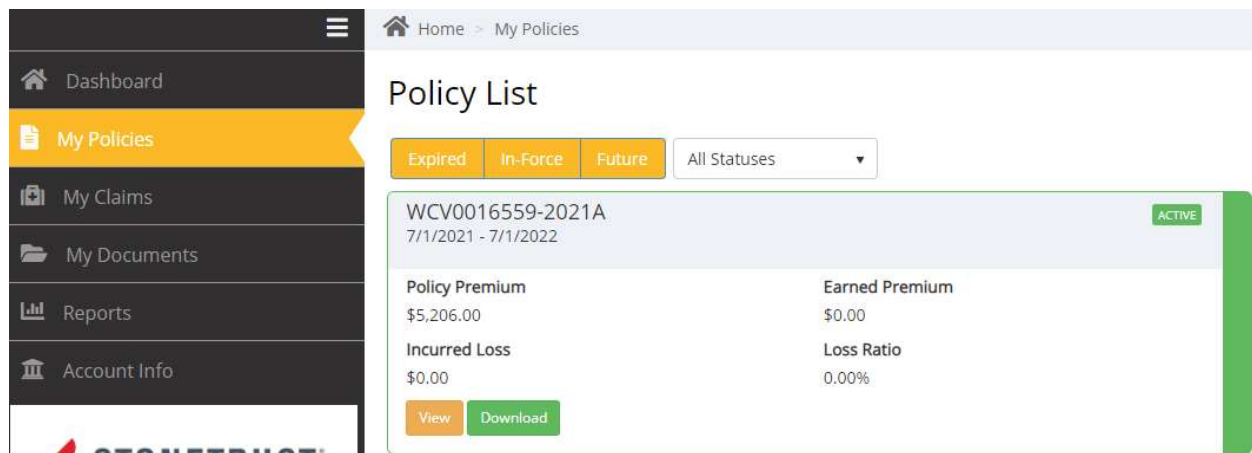
Dashboard



The dashboard features a dark sidebar with navigation links: Dashboard, My Policies, My Claims, My Documents, Reports, and Account Info. The main content area has a top bar with a search icon, a 'I Want To...' dropdown, and a user profile 'Joe'. Below this, a large light blue box displays 'No Announcements to display at this time.' A grid of four white boxes follows, each titled 'Claims by Status', 'Open Claims by Class Code', 'Open Claims by Injury Type', and 'Open Claims by Injured Body Part', all showing 'No Records To Display'. At the bottom, there are sections for 'Open Claims by Type' and 'Workplace Locations' with a table header: Insured, Workplace, Contact, Contact Phone..., Address 1, Address 2, City, State, Zip.

My Policies

- You can find Policy Premium and Loss Ratio
- You can download a copy of the Policy
- You can View the Policy Summary, Billing, Payroll, Endorsements and Claims



The 'My Policies' page shows a sidebar with navigation links: Dashboard, My Policies (highlighted), My Claims, My Documents, Reports, and Account Info. The main content area has a breadcrumb 'Home > My Policies' and a 'Policy List' section. It includes filters for 'Expired', 'In-Force', 'Future', and a dropdown for 'All Statuses'. A policy entry for 'WCV0016559-2021A' (7/1/2021 - 7/1/2022) is shown with an 'ACTIVE' status. The policy details are as follows:

Policy Summary	
Policy Premium	Earned Premium
\$5,206.00	\$0.00
Incurred Loss	Loss Ratio
\$0.00	0.00%

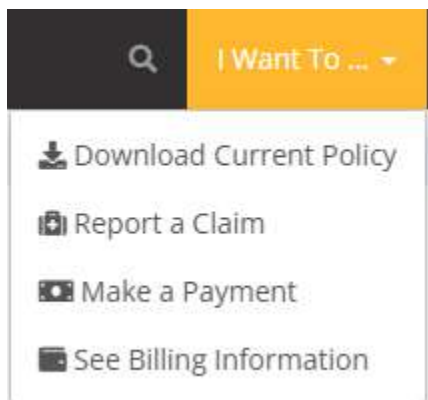
Buttons for 'View' and 'Download' are located at the bottom left of the policy entry.

My Claims

- You will find First Report of Injury List
- Claims List
- Report a Claim



Report A Claim



- Please complete the information in each field on the “First Report of Injury” screen (see below) to submit a claim.

First Report of Injury

Date of Injury

Jurisdiction

Injury Information

Date of Injury

Date of Injury

Employee

Personal/Wage Information

First Name

Middle Name

Last Name

Date of Birth

SSN

Hire date

Date Employee Began Work-Related Duties

Country

Address 1

Address 2

City, State, Zip

Gender

Marital Status

Job Title

Last saved on: Jun 21, 2021 1:52 PM

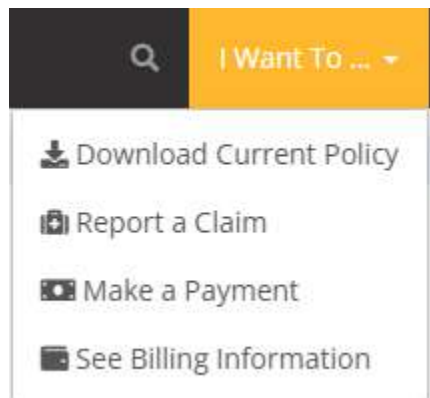
[< Previous](#) [Save](#) [Save & Continue >](#)

My Document List

- You will find a list of all documents produced for this Policy

Description	Associated with	Group	Modified
Billing Statement STC	Stonetrust Policy Test - WCV0016559-2021A, 2021A	Billing Statement	8/20/2021
Policy	Stonetrust Policy Test - WCV0016559-2021A, 2021A	Policy Issuance & Endorsement	8/20/2021
Policy Issuance Packet .PDF	Stonetrust Policy Test - WCV0016559-2021A, 2021A	Miscellaneous	8/20/2021
Billing Statement STC	Stonetrust Policy Test - WCV0016559-2021A, 2021A	Billing Statement	8/20/2021
Binder SC	Stonetrust Policy Test	Insured Letters	8/20/2021

Making a Payment



- Choose Make a Payment with the Statement you are paying on, click [Pay Selected](#). If you select an option without existing information, you will be prompted to enter new details. Please note that a convenience fee applies to all transaction types except ACH drafts.
- Select **Pay Today** (default), or **Schedule Payment**
- Choose the **payment type**, and **Pay in Full** (default) or **Pay Other**
- Review your information, enroll me in Paperless (optional), Enroll me in Pay by Text (optional), and click **I Agree** to the Invoice Cloud terms and conditions
- Check and Click the **GREEN** “Process Payment” [button](#)

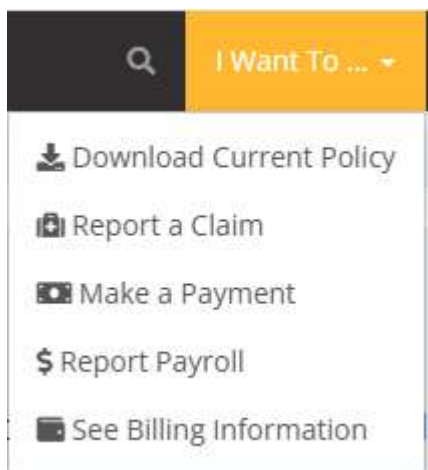
Set up autopay (Must have a billing statement to set up)

- Choose See Billing Information
- Choose one of the following options:



- Choose setup autopay  to manage your autopay option (if you have a saved payment method)
 - Select Edit to edit autopay setup
 - Once revisions are made select Save this autopay setup
- Choose Stored Payment Method icon  to set up new account information
 - Add New Bank or New Credit/Debit Card
 - Check the box Make this my default payment method
 - Check the box Apply this to my existing Autopay and scheduled payments (if applies)
 - Select save Information
- Choose setup autopay 
 - Select new autopay setup
 - Use this payment method by selecting the down arrow
 - Autopay Status
 - Yes, put me on Autopay
 - Save this AutoPay setup

Report Payroll



- Chose the Report you are paying on with the drop-down box (each State will have its own report to complete)
- Enter payrolls for each class code listed (if no payrolls you must enter 0)
- Click the **GREEN Submit & pay by Check** or **Submit & Pay**

4/11/2022 - 5/1/2022 ⓘ

Zero Fill

Exposure	Class Code/Description	Estimated	Full-Time Employee Count	Part-Time Employee Count	Payroll Amount	Rate	Manual Premium
Workers Comp	0012 - PAID FURLOUGHED EMPLOYEES	\$0				0.00	\$0
Workers Comp	5022 - MASONRY NOC	\$13,560				9.02	\$0
					\$0		

Premium Calculation

Description	Factor	Amount
Total Manual Premium		\$0
EZ Premium Adjustment ⓘ	0.654882	\$0
EZ Premium		\$0
Terrorism Insurance Act Charge	0.0001	\$0
Domestic Terrorism Insurance A	0.0002	\$0
Premium & Surcharges Due With This Report		\$0
Installment Charge		\$4
Outstanding Balance		\$0
Total Including Outstanding Balance		\$4

Cancel

Print

Save & Submit Later

Submit & Pay by Check

Submit & Pay Online