![RiskPartner]

PORTAL USER'S GUIDE

FOR

![Archdiocese of Seattle]

This document provides instructions for using the RiskPartner application to submit your renewal information.

If you have any questions, please contact one of the following service team members:

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RiskPartner

Logging In

RiskPartner
Simplifying Risk Management

Sign in to your account

Please enter your credentials to log in

| 🅿 | English | ▾ |

| 👤 | Login ID | |

| 🔑 | Password | I forgot my password |

| 👥 | Client | |

☑ Remember Me   **Sign In**

1. Click on following URL: https://login.riskpartner.com
2. Enter your Login Credentials
   a. (Login ID): Type your complete email address. (Not Case Sensitive)
   b. (Password):
      i. **Returning Users**: Use your existing password. If you have forgotten your password, click **I forgot my password** and initiate the password reset process. Once you have changed your password, click **Save** at the bottom of the screen.
      ii. **First Time Users**: Type in the word "password". You will be required to change this after logging into RiskPartner for the first time.
   c. (Client): Type in "Archdiocese of Seattle" (Not Case Sensitive)
3. (Optional) – Check the "Remember Me" check box and the system will remember your Login ID and client next time.

RiskPartner
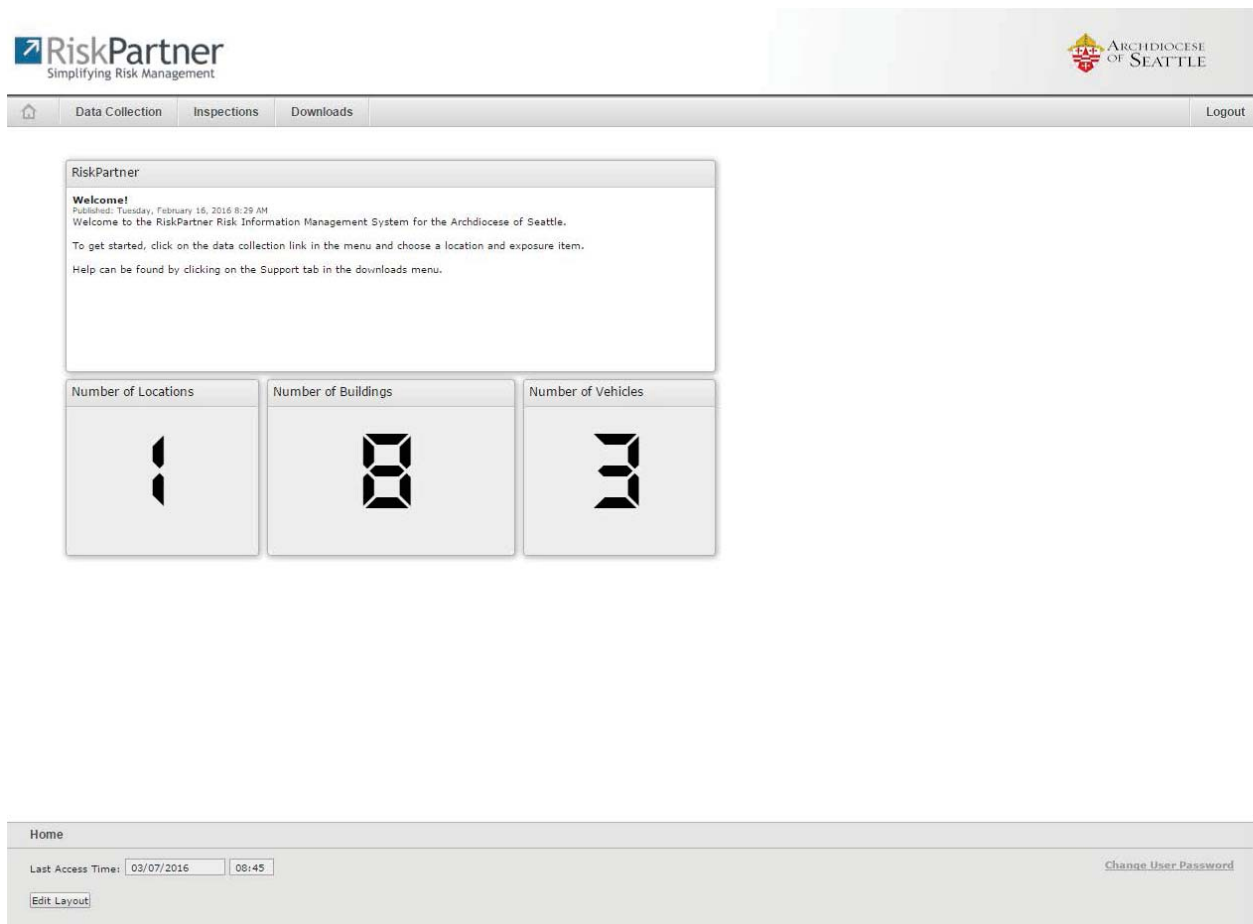
Home Page

Upon Login to RiskPartner, you will notice some general data which is specific to your login displayed on the home page. You can get back to this data at any time by clicking the [home] icon in the upper left. You will also notice 3 tabs. Each is listed and explained below:

- Data Collection: Used to review and update property and vehicle information.
- Inspections: For Future Use
- Downloads: Used to download documents such as appraisals, inspection reports, etc..

To logout, simply click on the [Logout] icon in the upper right corner of the window.
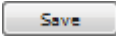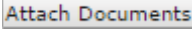
Submit Changes

The Data Collection tab supports your ability to add, edit, delete, or confirm existing exposure information including: buildings, vehicles, and doctors schedules if applicable.
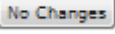
To review and modify your exposure information:

1. Hover over the Data Collection Menu and select Data Collection by Location
2. Make a selection in the exposure type drop down field, which is used to manage buildings, vehicles, and Dr. Schedules, if applicable.
3. Make a selection in the Location drop down field.
4. Make Changes
   a. **To add a new record**, click the Add Item icon and enter the required fields (displayed with red labels), along with any other pertinent information and click Save at the bottom of the window. The icon will show next to added items until they are approved.
   b. **To edit an existing record**, click the icon next to the item you would like to edit, make changes as necessary and click Save at the bottom of the window. The icon will show next to edited items until they are approved.

      c. **To delete an existing record**, click the ✕ Delete Item icon, enter notes on why it is being deleted and click [Save] at the bottom of the window. The 🔴 icon will show next to deleted items until they are approved.

5. Upload documents – You can upload and attach documents to exposure items (building/vehicles) while editing an existing record or adding a new record.

      a. Click on the Attach Documents button at the bottom of the exposure item window while in add or edit mode.

      b. Click the ➕ Add Document button at the top left of the Attach Documents pop-up window

      c. Fill out the file name, type, category, and description and click the [Browse...] button to select the file from your computer or network.

      d. Once selected, click the [Save] button and repeat steps b-d for each document which needs to be attached. Each file has a 20MB size limit. There is not a limit to the number of files which can be attached.

      e. Once all files are attached, click the Close button to close the file attachment window.

      f. Remember to save the Exposure Item record.

**Note: Submitted changes are not finalized until approved by an administrator. **

To confirm existing data is accurate without the need for changes:

1. Follow steps 1-3 above

2. Click on the No Changes icon at the bottom of the window to send a record to The Archdiocese Insurance Department letting them know that the information has been reviewed and no changes are necessary for that type of exposure.

This only needs to be done once per type of exposure.

Repeat the process until you have submitted changes or a no change record for all exposure items and locations to which you have access.

Review Submissions

	Data Collection Number	Date	Code/Number	Name/Description	Type	Insured Value/Count	Policy	Status
⚫	1015	03/07/2016	NC	No Changes				
🔴	1014	03/07/2016	104 - 1002	St. Michael, OLYMPIA - School / Gym	School	4807967.00		
🟡	1013	03/07/2016	104 - 1001	St. Michael, OLYMPIA - Office (Rectory)	Dwelling	1032572.00		
🟢	1012	03/07/2016	1243	New Fellowship Hall	Fellowship Hall			

Filter: Show Pending

Page: 1 of 1 Go   Page size: 4 Change   Item 1 to 4 of 4

To view past submissions, simply click on the Submitted tab and select a filter to list approved, rejected, or pending submissions.

Click on data headers to sort information in the list.

Submissions are color coded based on type of change:

🟢 Added Record

🟡 Edited Record

🔴 Deleted Record

⚫ No Changes Required

Downloads

The Downloads menu will allow you to download files provided by Administrators. Files are listed by category, accessible by the tabs at the bottom of the window.

To open a file, simply double click on the file name. Files will be opened by the corresponding application on your computer. (Example: Word files would open in MS Word, PDF Files will open in Adobe, etc.)