

Guide to *Account Information*



CHRISTIAN
BROTHERS
SERVICES

Risk Management Services

Accessing Account Information Online

You can access your organization's account information and request transactions conveniently through a secure website.

Property - Vehicle - Watercraft Schedules

- View up-to-date property, builders risk, vehicle and watercraft schedules.
- Submit changes.
- Receive an email confirmation.

Underwriting Documents

- Renewal billing, Section V of the Plan Document, Transaction changes and Vehicle Insurance ID cards.

Certificate of Insurance

- Request a Certificate of Insurance.

Claims

- Report a claim.
- Access claim data.
- View individual claim details.
- Submit questions on individual claims conveniently through email.
- Sort claims by occurrence date or claim type.
- View a claim summary report. View the total number of claims and incurred losses by coverage and plan year for five years.

Three Ways to Register for Web Access

1. Online

It's easy to register for web access. Follow the step-by-step instructions provided on pages 3 through 5.

2. Over the Phone

Call 1.800.807.0300 and follow the prompt. Choosing 2 for Web Registration.

3. Email

Email the following information to rmscustomerservice@cbservices.org to activate your online access:

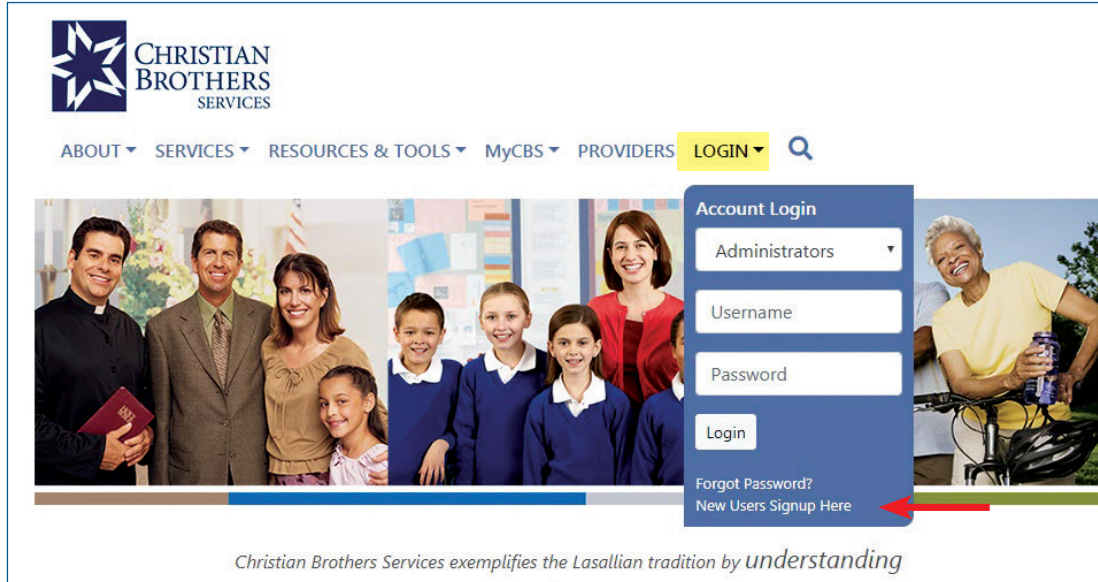
- Your name & title
- Organization name & address
- Telephone number
- Email address
- List of the Risk Pooling Trust location number(s) for which you are the administrator
- List of areas to access (i.e. claims, property, auto, etc.)

Please Note:

Web access is only available to the administrator on record with Christian Brothers Risk Management Services (CBRMS). Upon request, the administrator may authorize CBRMS to add this functionality to other people within your organization.

How to Register Online

Log on to cbservices.org and click on LOGIN.



The screenshot shows the Christian Brothers Services website. At the top left is the logo. A navigation bar includes links for ABOUT, SERVICES, RESOURCES & TOOLS, MyCBS, PROVIDERS, and a highlighted LOGIN button. Below the navigation bar is a large banner image featuring a group of people. Overlaid on the right side of the banner is a blue 'Account Login' box. This box contains a dropdown menu set to 'Administrators', input fields for 'Username' and 'Password', a 'Login' button, and links for 'Forgot Password?' and 'New Users Signup Here'. A red arrow points to the 'New Users Signup Here' link. To the right of the banner, outside the login box, is another red arrow pointing to the same link, with the text 'Click New Users Signup Here link.'

The Registration page will appear; click Register for Administrators.

Registration

Participants | myCBS

Information for individuals enrolled in plans. Access plans, programs, and resources all in one section.

- My Health Benefits
- My Retirement
- My Risk Service

Register for Participants | myCBS

Administrators Section

Employer and Organizational account management

- Employee Benefit Trust
- Religious Medical Trust
- Risk Pooling Trust
- Student Accident Plan
- Retirement

Register for Administrators

Before you Register

This online section is designed for individuals who are authorized to view and request changes to their organization's account(s) that Christian Brother Services administers.

Because you are requesting to access sensitive data, you will not have immediate access upon registering. Please allow a couple of days for your registration request to be validated. After your account has been validated, you will receive an email letting you know that you can enter the Member Administration Section.

NOTE: This section does not provide access to individual participant accounts, such as EOB's and personal medical claims information. If you are looking for access to individual participant information, [click here](#).

Register Online Now

When you're ready to proceed to the Online Registration Form, click the Register Online Now button.

Complete the Online Registration Form



Administrators *Section*

Registration

Home > Registration

Personal Information: (all fields are required)	
Salutation:	Mr. ▼ Other:
Last Name:	
First Name:	
Birthday:	(Month/Day) 01 ▼ / 01 ▼
Job Title:	
Organization:	
C/O Line 1:	
C/O Line 2:	
Address Line 1:	
Address Line 2:	
Address Line 3:	
Address Line 4:	
City:	
State:	--- ▼ Zip
Phone:	ext.
Fax:	
Email Address:	

Alternate Mailing Address: (if you wish to receive mail somewhere other than the organization)	
C/O Line 1:	
C/O Line 2:	
Address Line 1:	
Address Line 2:	
Address Line 3:	
Address Line 4:	
City:	
State:	--- ▼ Zip

Security Information: (all fields are required)	
The following will be used for identity verification purposes	
(Characters not allowed: space, ?, /, \$)	
Username:	(4-25 characters)
Password:	(6-10 characters)
Confirm Password:	
Question:	In which city were you born? ▼
Answer:	(must be different from password)
Question:	In which city were you born? ▼
Answer:	(must be different from password)

← A form like this one will appear. Complete the form in its entirety.

← Create a username and password. Select two security questions and answers to help you if you forget your password.

Complete the Online Registration Form

Choose Your Enrolled Programs:		
Select all programs for which you are requesting access. At least one program must be selected. You must specify the location number(s) for any program you select.		
Program*	Location Numbers:* (Example: 0099019) (separate multiple account numbers with comma)	Contact Type:
☐ Employee Benefit Trust		☐ Main ☐ Secondary
☐ Religious Medical Trust		☐ Main ☐ Secondary
☒ Risk Pooling Trust		☒ Main ☒ Secondary
☐ Student Accident Plan		☐ Main ☐ Secondary
☐ 401k Plan		☐ Main ☐ Secondary
☐ 403b Plan		☐ Main ☐ Secondary
☐ Employee Retirement Plan (Part 2 of registration; You will receive a security form via email.)		☐ Main ☐ Secondary

Check all programs you would like to access. For RPT, enter your seven digit RPT location number. If you have more than one location number, separate multiple location numbers with a comma.

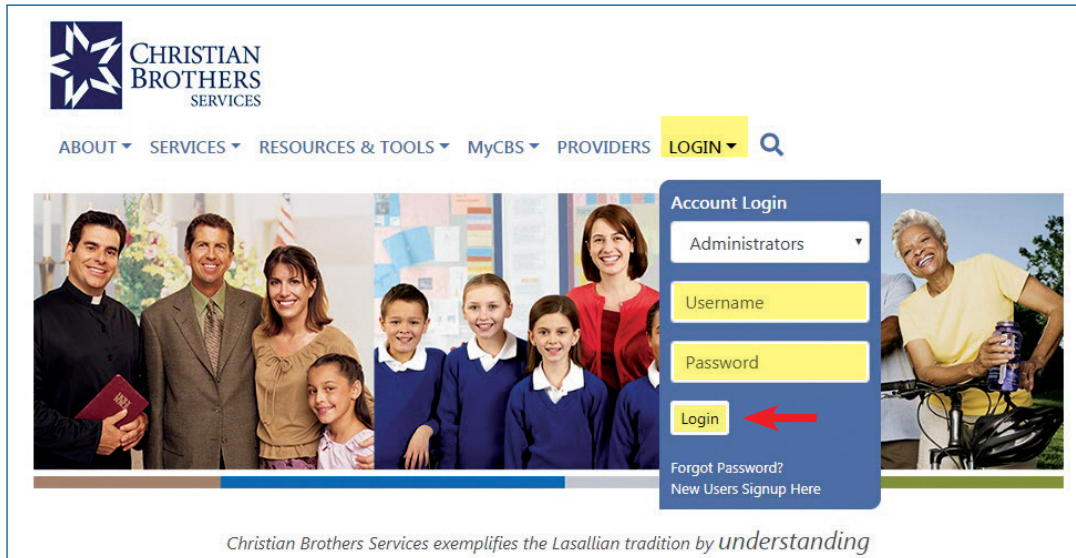
Choose Main or Secondary contact. Click the heading Contact Type for a definition.

Submit

When the information is complete, click the Submit button. The Trust will verify your registration and set up your account within 3 business days.

Navigating the Menus

Log on to cbservices.org and access your account using your username and password.



CHRISTIAN BROTHERS SERVICES

ABOUT SERVICES RESOURCES & TOOLS MyCBS PROVIDERS LOGIN

Account Login

Administrators

Username

Password

Login

Forgot Password?

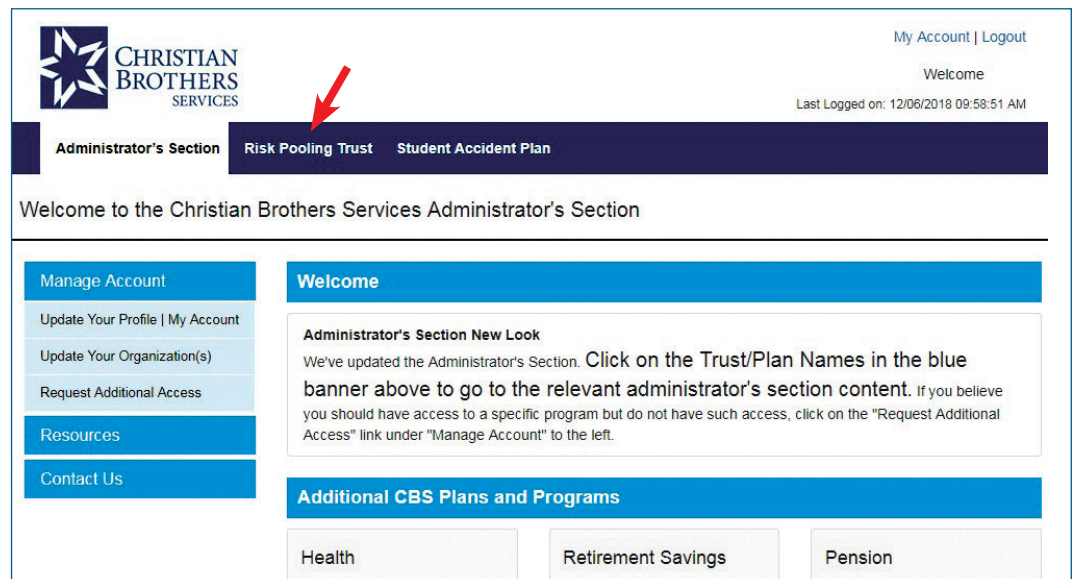
New Users Signup Here

Christian Brothers Services exemplifies the Lasallian tradition by *understanding*

Enter your Username and Password, then click the Login button.

Welcome screen

On the Welcome page, click Risk Pooling Trust in the blue banner.



CHRISTIAN BROTHERS SERVICES

My Account | Logout

Welcome

Last Logged on: 12/06/2018 09:58:51 AM

Administrator's Section Risk Pooling Trust Student Accident Plan

Welcome to the Christian Brothers Services Administrator's Section

Manage Account

Update Your Profile | My Account

Update Your Organization(s)

Request Additional Access

Resources

Contact Us

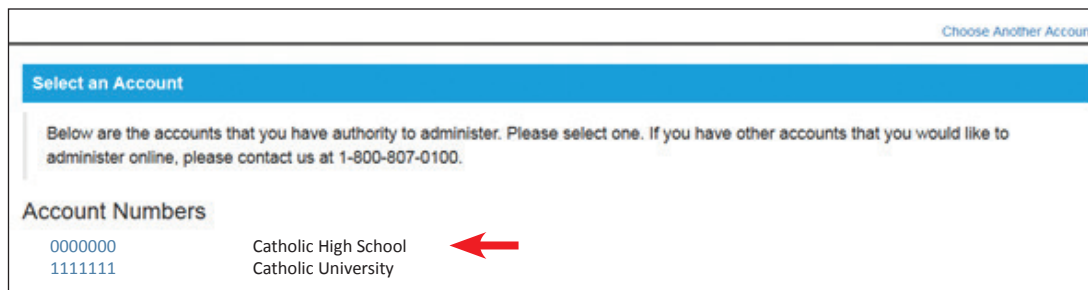
Welcome

Administrator's Section New Look

We've updated the Administrator's Section. Click on the Trust/Plan Names in the blue banner above to go to the relevant administrator's section content. If you believe you should have access to a specific program but do not have such access, click on the "Request Additional Access" link under "Manage Account" to the left.

Additional CBS Plans and Programs

Health Retirement Savings Pension



Choose Another Account

Select an Account

Below are the accounts that you have authority to administer. Please select one. If you have other accounts that you would like to administer online, please contact us at 1-800-807-0100.

Account Numbers

0000000	Catholic High School
1111111	Catholic University

Select an Account screen

Click an Account Number to access the RPT Account Menu section.

RPT Account Menu

CHRISTIAN BROTHERS SERVICES

[My Account](#) | [Logout](#)
Welcome

[Administrator's Section](#)
[403b](#)
[Employee Benefit Trust](#)
[Employee Retirement Plan](#)
[Religious Medical Trust](#)
[Risk Pooling Trust](#)

9999999 - Catholic High School
| [Update Organization](#)
[Choose Another Account](#)

1

Vehicle Schedule

All Vehicles

By Garage State

Full Coverage

Liability Only

Deleted Vehicles

2

Property Schedule

3

Certificates of Insurance

4

Builder's Risk Schedule

5

Underwriting Documents

6

Claims

All Vehicles
Export List

Information as of Thursday 12/27/2018. Changes made to vehicles will not be displayed until the requests have been processed.

Click on a Vehicle to Remove, Transfer, Trade-In or Change

Add Vehicle

Click on the blue column header to sort vehicles by that column.

Site	Unit	Year	Vehicle	VIN	Cov.	Contribution
0	9	2000	Ford	9999999999	F	\$999.90
0	9	2002	Chevy	9999999999	F	\$999.90
0	9	2003	Chrysler	9999999999	L	\$999.90
0	9	2004	Jeep	9999999999	F	\$999.90
0	9	2007	Ford	9999999999	F	\$999.90
0	9	2007	Chevy	9999999999	F	\$999.90
0	9	2011	KIA	9999999999	F	\$999.90
0	9	2011	Toyota	9999999999	F	\$999.90
0	9	2010	GM	9999999999	F	\$999.90
0	9	2010	Chrysler	9999999999	F	\$999.90

NOTE: You will be referred back to this screen throughout this guide to access the following category options.

1. Vehicle Schedules:
You may request a vehicle be added, transferred, traded in, removed or changed.

2. Property Schedules:
Make changes such as adding, changing or removing property.

3. Certificates of Insurance:
Request Certificates of Insurance.

4. Builders Risk Schedules:
Request Builders Risk.

5. Underwriting Documents:
Renewal billing, Section V of the Plan Document, Transaction changes and Vehicle Insurance ID cards.

6. Claims:
Report a claim and view claim information.

Vehicle Schedules

From the RPT Account Menu (sample screen on page 7), locate and click on Vehicle Schedule.

Click on the [All Vehicles](#) link under [Vehicle Schedule](#). You will obtain a list of your current vehicles as of the moment. You may sort the schedule by site number, unit number, year of the vehicle and VIN number.

All Vehicles Covered screen

By clicking on the vehicle description, you can view details for that vehicle and Remove, Transfer, Trade-In or Change that vehicle.

To add a vehicle, click on the [Add Vehicle](#) button.

Click [Export List](#) link for vehicle listing in Excel format.

CHRISTIAN BROTHERS SERVICES

My Account | Logout
Welcome

Administrator's Section 403b Employee Benefit Trust Employee Retirement Plan Religious Medical Trust Risk Pooling Trust

9999999 - Catholic High School | Update Organization Choose Another Account

Vehicle Schedule All Vehicles By Garage State Full Coverage Liability Only Deleted Vehicles Property Schedule Certificates of Insurance

All Vehicles Export List

Information as of Thursday 12/27/2018. Changes made to vehicles will not be displayed until the requests have been processed.

Click on a Vehicle to Remove, Transfer, Trade-In or Change Add Vehicle

Click on the blue column header to sort vehicles by that column.

Site	Unit	Year	Vehicle	VIN	Cov.	Contribution
0	9	2000	Ford	9999999999	F	\$999.90
0	9	2002	Chevy	9999999999	F	\$999.90

CHRISTIAN BROTHERS SERVICES

My Account | Logout
Welcome

Administrator's Section 403b Employee Benefit Trust Employee Retirement Plan Religious Medical Trust Risk Pooling Trust Student Accident Plan

9999999 - Catholic High School | Update Organization Choose Another Account

Vehicle Schedule All Vehicles By Garage State Full Coverage Liability Only Deleted Vehicles Property Schedule Certificates of Insurance Builder's Risk Schedule Watercraft Schedule Underwriting Documents Claims Risk Control

Vehicle Info Remove Transfer Trade-In Change

Ford F-Sup Duty Dump

Year: 2017

VIN Number: 12345678912345678

Site Number: 0

Unit Number: 10

Garage City: Any Town

Garage State: Any State

Plate State: Any State

Coverage Info:

Type: Full

Contribution: \$9999.99

Deductibles: 500/250

Vehicle Info screen

A screen like this will appear containing vehicle information.

Simply select the type of transaction you would like to perform.

Vehicle Schedules

Instead of manually filling out forms and faxing or mailing them to the Trust, you can perform a number of transactions online - adding, removing, changing, trading in or transferring vehicles.

RPT Account Menu screen

My Account | Logout
Welcome:

Administrator's Section 403b Employee Benefit Trust Employee Retirement Plan Religious Medical Trust Risk Pooling Trust

9999999 - Catholic High School | Update Organization Choose Another Account

Vehicle Schedule
All Vehicles
By Garage State
Full Coverage
Liability Only
Deleted Vehicles

Property Schedule
Certificates of Insurance
Builder's Risk Schedule

All Vehicles Export List

Information as of Thursday 12/27/2018. Changes made to vehicles will not be displayed until the requests have been processed.

Click on a Vehicle to Remove, Transfer, Trade-in or Change

Click on the blue column header to sort vehicles by that column.

Site	Unit	Year	Vehicle	VIN	Cov.	Contribution
0	9	2000	Ford	9999999999	F	\$999.00
0	9	2002	Chevy	9999999999	F	\$999.00
0	9	2003	Chrysler	9999999999	L	\$999.00
0	9	2004	Jag	9999999999	F	\$999.00
0	9	2007	Ford	9999999999	F	\$999.00
0	9	2007	Chevy	9999999999	F	\$999.00

Change Vehicle screen

Change Vehicle

*Required Fields

Vehicle Info:

Original Entry	Changes
*Year: 2017	2017
*Vehicle: Ford	Ford
	Type (if applicable):
	-
	*Seating Capacity (van or bus):
	-
*VIN Number: 1234567891234567	1234567891234567
Site Number: 0	0
Unit Number: 10	10
*Garage City: Any Town	Any Town
Garage State: Any State	Any State

Add Vehicle screen

Add Vehicle

*Required Fields

Vehicle Info:

*Year:	2017
*Vehicle:	Chevy
	Passenger Van/Cargo Van/Bus
*Seating Capacity (van or bus):	
*VIN Number:	1234567891234567
Site Number:	0
*Garage City:	Any State
*Garage State:	
*Plate State:	
*Registered To:	Organization Individual 2 Individuals

Trade-In Vehicle screen

Trade-In Vehicle

*Required Fields

Vehicle Info:

Vehicle to drop	Vehicle to add
*Drop Date:	*Add Date:
*Year: 2017	
*Vehicle: Ford	
	Type (if applicable):
	-
	*Seating Capacity (van or bus):
	-
*VIN Number: 1234567891234567	
Site Number: 0	
Unit Number: 10	To Be Assigned
*Garage City: Any Town	

Remove Vehicle screen

Vehicle Info Remove Transfer Trade-In Change

Chev Astro Cargo Van

Year:	2017
VIN Number:	1234567891234567
Site Number:	0
Unit Number:	10
Garage City:	Any Town
Garage State:	Any State
Plate State:	Any State

Coverage Info:

Type:	Full
Contribution:	
Deductibles:	500/250

Transfer Vehicle screen

Transfer Vehicle

*Required Fields

Vehicle Info:

Current Account	New Account
Year: 2017	2017
Vehicle: Ford	Ford
	Type (if applicable):
	-
	*Seating Capacity (van or bus):
	-
VIN Number: 1234567891234567	1234567891234567
Site Number: 0	0
Unit Number: 10	TBD
*Garage City: Any Town	Any Town
Garage State: Any State	Any State
*Registered To:	Organization Individual 2 Individuals

Updating vehicle information is easy. Simply select a vehicle from the schedule and select the type of transaction. Required fields are marked by an asterisk. *

Property Schedules

Instead of manually filling out forms and faxing or mailing them to the Trust, you can perform a number of transactions online - adding, removing or changing property.

From the RPT Account Menu (sample screen on page 7), locate and click on Property Schedule.

Property Schedule screen

By clicking on the building name, you can view details for that property, and remove or change that property.

To add a property, click on the Add Property button.

Click on Export List link for property listing in Excel format.

CHRISTIAN BROTHERS SERVICES

My Account | Logout
Welcome

Administrator's Section 403b Employee Benefit Trust Employee Retirement Plan Religious Medical Trust Risk Pooling Trust Student Accident Plan

9999999 - Catholic High School | Update Organization

Choose Another Account

Vehicle Schedule
Property Schedule
Property Schedules
Deleted Property
Certificates of Insurance
Builder's Risk Schedule
Watercraft Schedule
Underwriting Documents
Claims
Risk Control
Documentation
Contact Us

Property Schedule

Information as of Thursday 12/27/2018. Changes made to properties will not be displayed until the requests have been processed.

Click on a Building to Remove or Change

Export List

Add Property

Site	Address	City	State
1	1234 Main Street	Hometown	IL
2	5678 Second Street	Somewhere	IN
3	9876 Rural Road	Country Town	OH

Building						Contents			
Site	ID	Building Name	OC	RC/AV	Value	Contrib.	Value	Contrib.	
1	1	Catholic High School	HS	AV	\$3,000,000	\$6,000	\$100,000	\$200	
1	2	Brothers Residence	RE	AV	\$1,000,000	\$2,000	\$100,000	\$200	
1	3	Misc	OO	AV	\$0	\$0	\$0	\$0	

Property Info

Remove Change

Gym & Cafeteria/incl In #001 (Site: 1 ID#: 4)

Address: 1234 Main Street

Occupancy: Gym

County: Cook

Constructed: 1984

Building Type: NA

Occupants: 0

Stories: 0

Fire Protection:

Boiler Machinery: Yes

Elevators: 0

Coverage Type:

	Building	Contents
Value:		
Contributions:		

Property Info screen

A screen like this will appear containing property information.

Simply select the type of transaction you would like to perform.

Property Schedules

Add Property	
*Required Fields	
Building Information:	
*Name of Building:	Brothers Residence
*Address of Building:	1234 Second Street
*City:	Hometown
*State:	WI
*Zip Code:	00000
*Occupancy (Use) of Building:	NA
*# of Occupants:	100
*Year Built:	2002
*Square Footage:	NA
*Building Value: (Replacement Cost)	0
*Contents Value:	0

Add Property screen

To add a property: click on the Add Property button on the Property Schedule screen. Complete form and click Submit. Required fields are marked by an asterisk.*

Remove Property screen

To remove a property: select Remove from the Property info screen. Complete the form and click Submit. Required fields are marked by an asterisk.*

Remove Property	
*Required Fields	
Building Information:	
Site:	1
ID #:	2
Name of Building:	Catholic Church
Address of Building:	5678 First Street
City:	Anytown
State:	IL
Zip:	00000
Year Built:	1958
Occupancy (Use) of Building:	NA
# of Occupants:	NA
# of Stories:	NA
Fire Class:	NA
Boiler located in building:	NA
# of Elevators:	NA

Change Property		
*Required Fields		
Building Information:		
	Original Entry	Changes
Site:	2	
ID #:	3	
*Name of Building:	Catholic High School	
*Address of Building:	9876 Education Road	9999 Graduation Blvd
*City:	Somewhere	Reading
*State:	MS	PA
*Zip:	00000	99999
*Year Built:	1966	
*Occupancy (Use) of Building:	NA	

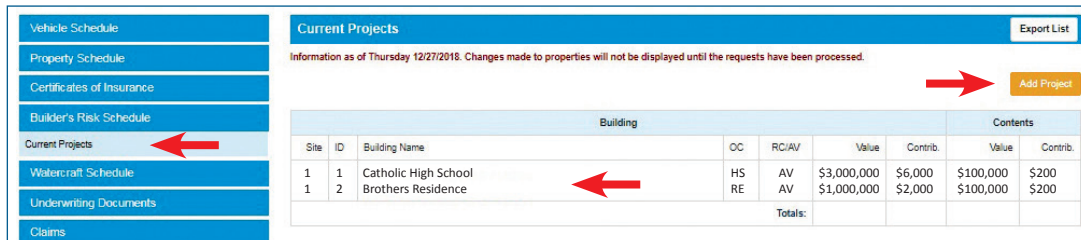
Change Property screen

To change a property: select Change from the Property Info screen. Complete the form and click Submit. Required fields are marked by an asterisk.*

Builder's Risk Schedule

It is important to let your account manager know when you are planning new construction, remodeling or renovating any of your buildings.

From the RPT Account Menu (sample screen on page 7), locate and click on Builder's Risk Schedule.



Current Projects									
Information as of Thursday 12/27/2018. Changes made to properties will not be displayed until the requests have been processed.									
Building							Contents		
Site	ID	Building Name	OC	RC/AV	Value	Contrib.	Value	Contrib.	
1	1	Catholic High School	HS	AV	\$3,000,000	\$6,000	\$100,000	\$200	
1	2	Brothers Residence	RE	AV	\$1,000,000	\$2,000	\$100,000	\$200	
Totals:									

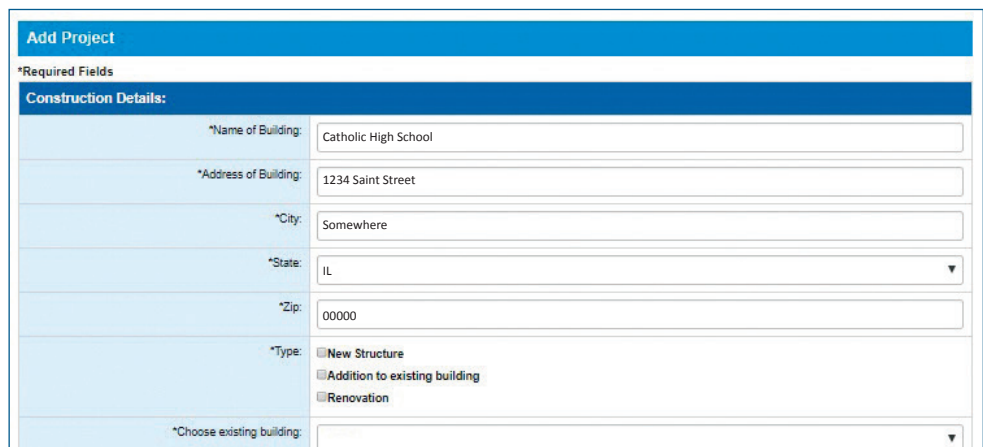
Current Projects screen

Click the Current Projects link to access a project list. By clicking on the building name, you can view details for that project.

Add Project screen

To add a project: click on the Add Project button from the Current Projects list.

Complete form and click Submit. Required fields are marked by an asterisk.*



Add Project	
*Required Fields	
Construction Details:	
*Name of Building:	Catholic High School
*Address of Building:	1234 Saint Street
*City:	Somewhere
*State:	IL
*Zip:	00000
*Type:	☐ New Structure ☐ Addition to existing building ☐ Renovation
*Choose existing building:	

Please provide a copy of the construction contract to your account manager when you are planning new construction, remodeling or renovating any of your buildings.

Certificate of Insurance

Instead of manually filling out forms and faxing or mailing them to the Trust, you can now request a Certificate of Insurance online.

From the RPT Account Menu (sample screen on page 7), locate and click on Certificate of Insurance.

Certificate of Insurance screen

My Account | Logout
Welcome

Administrator's Section403bEmployee Benefit TrustEmployee Retirement PlanReligious Medical TrustRisk Pooling TrustStudent Accident Plan

9999999 - Catholic High | Update OrganizationChoose Another Account

Vehicle Schedule

Property Schedule

Certificates of Insurance

Request Certificate of Insurance

Builder's Risk Schedule

Watercraft Schedule

Underwriting Documents

Claims

Risk Control

Documentation

Contact Us

Certificate of Insurance

*Required Fields

Location Information:

Location #:

9999999

*Location Name:

Catholic High School

*Location Phone:

(000) 000-0000

*Location Fax:

(000) 000-0000

*Contact:

Jane Smith

Certificate Holder:

(Party requesting evidence of coverage)

*Certificate Holder:

(30 characters or less)

*Attention:

*Address:

(30 characters or less)

*City:

Click the Request Certificate of Insurance link and complete this form.

Location Information:

Be sure to complete all required fields marked by an asterisk*.

Certificate Holder:

Identify who will receive the Certificate. Complete in its entirety.

Certificate of Insurance

Certificate Information:	
*Date Due:	
*Agreement Type:	☐ Written ☐ Verbal (If written, please submit a copy of the ENTIRE Contract Agreement, prior to signing it.)
Attach Contract / Lease Agreement:	Please re-attach your attachment(s) if the form fails to submit. Browse... Browse... Browse... Browse...
*Is this Certificate for an event?	☐ Yes ☐ No
*Type of event:	
*Dates/Times of Event:	
Evidence of Coverage:	
*Show Coverage of:	☐ Automobile ☐ Property ☐ General/Excess Liability ☐ Professional Liability ☐ Workers' Comp ☐ Other
*If Other, please specify:	
*Type of Certificate Holder:	☐ Evidence of Coverage Only ☐ Additional Insured ☐ Loss Payee ☐ Mortgagee
*Delivery:	☒ Mail ☐ Fax ☐ Email
Additional Comments:	
Approval Information	
*Effective Date	
Requested By:	Jane Smith
Requested Date:	01/01/2019
Transaction #:	0000-000000
Cancel Submit	

Certificate Info:

If Agreement Type is "Written", attach a copy of the entire contract agreement, prior to signing it.

If selecting yes, "Is this Certificate for an event", provide the details of the event. If no, provide the details of the request for evidence of coverage.

Evidence of Coverage:

List the coverages needed and type of certificate holder.

Additional Comments:

Enter additional comments in this section.

Approval Info:

Select the Effective Date by clicking on the calendar or enter the date (ex: MM/DD/YYYY) and click Submit.



Watercraft Schedules

Instead of manually filling out forms and faxing or mailing them to the Trust, you can now request a number of transactions online - adding, editing or removing watercraft.

From the RPT Account Menu (sample screen on page 7), locate and click on Watercraft Schedule.

RPT Account Menu screen

CHRISTIAN BROTHERS SERVICES

My Account | Logout
Welcome

Administrator's Section 403b Employee Benefit Trust Employee Retirement Plan Religious Medical Trust Risk Pooling Trust

9999999 - Catholic High School | Update Organization Choose Another Account

Vehicle Schedule
All Vehicles
By Garage State
Full Coverage
Liability Only
Deleted Vehicles

Property Schedule
Certificates of Insurance
Builder's Risk Schedule
Watercraft Schedule
Underwriting Documents

All Vehicles Export List

Information as of Thursday 12/27/2018. Changes made to vehicles will not be displayed until the requests have been processed.

Click on a Vehicle to Remove, Transfer, Trade-In or Change

Add Vehicle

Click on the blue column header to sort vehicles by that column.

Site	Unit	Year	Vehicle	VIN	Cov.	Contribution
0	9	2000	Ford	999999999999	F	\$999.90
0	9	2002	Chevy	999999999999	F	\$999.90
0	9	2003	Chrysler	999999999999	L	\$999.90
0	9	2004	Jeep	999999999999	F	\$999.90
0	9	2007	Ford	999999999999	F	\$999.90
0	9	2007	Chevy	999999999999	F	\$999.90
0	9	2011	KIA	999999999999	F	\$999.90
0	9	2011	Toyota	999999999999	F	\$999.90
0	9	2010	GM	999999999999	F	\$999.90
0	9	2010	Chrysler	999999999999	F	\$999.90

All Watercrafts Covered screen

CHRISTIAN BROTHERS SERVICES

My Account | Logout
Welcome

Administrator's Section 403b Employee Benefit Trust Employee Retirement Plan Religious Medical Trust Risk Pooling Trust Student Accident Plan

9999999 - Catholic High School pdate Organization Choose Another Account

Vehicle Schedule
Property Schedule
Certificates of Insurance
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Watercraft Schedule
Watercraft Schedule
Deleted Watercraft
Underwriting Documents

Watercraft Schedule Export List

Information as of Thursday 12/27/2018. Changes made to watercraft will not be displayed until the requests have been processed.

Click on a Watercraft to Remove or Change

Add Watercraft

Site	ID	Year	Description	Identification/Serial #	Location	Contribution
1	2	2005	Fancy Boat	000000000	Beautiful Lake	\$1,000
						Total:

By clicking on the watercraft description, you can view details for that watercraft and Remove, Transfer, Trade-In or Change that watercraft.

To add a watercraft, click on the Add Watercraft button.

Click Export List link for watercraft listing in Excel format.

Underwriting Documents

To view Underwriting Documents return to the main RPT Account Menu screen (displayed below).

Underwriting Documents screen

CHRISTIAN BROTHERS SERVICES

My Account | Logout
Welcome

Administrator's Section 403b Employee Benefit Trust Employee Retirement Plan Religious Medical Trust Risk Pooling Trust Student Accident Plan

9999999 - Catholic High School | Update Organization

Choose Another Account

Vehicle Schedule
Property Schedule
Certificates of Insurance
Builder's Risk Schedule
Watercraft Schedule
Underwriting Documents
Underwriting Documents
Additional Member Documents
Claims

Underwriting Documents

Now you can view billing statements, renewal information, auto ID cards, and updated schedules online that you would normally receive as hard copy through the mail.

Click on the Plan Year for more detail.

Property Casualty	Workers Comp border
2017-2018	2018
2016-2017	2017
2015-2016	2016

To view a document, select the checkbox to the left of the recipient column and then click "View" at the bottom.

Click the plan year you wish to view.

A list of underwriting documents will appear. These include electronic copies of Renewal documents, Section V - Plan Document coverages, changes to your Property, Vehicle or Watercraft schedules and Auto ID cards. The list is sorted by transaction date.

Media Management screen

Media Management: Policy 999999999

Policy Documents

Hide Search

Recipient: Insureds Name: Trans Type: Date Produced: Search

Advanced Search

Recipient	Description	Date Produced
☐ ID Card OTHER	Renewal ID Cards -	6/15/2018
☒ Member	Endorsement Change - AUTO CHANGE COVERAGE	3/13/2018
☐ Member	Endorsement Change - AUTO CHANGE COVERAGE	3/1/2018
☐ Member	Endorsement Change - AUTO CHANGE COVERAGE	2/2/2018
☐ Member	Endorsement Change - PROPERTY BLDG CHANGE	12/8/2017
☐ Member	Section V - Plan Document -	8/24/2017
☐ Member	Renewal -	6/1/2017

View

Page 1 of 1

To view a document, click in the checkbox to the left of the Recipient column and then click "View" at the bottom of the page.

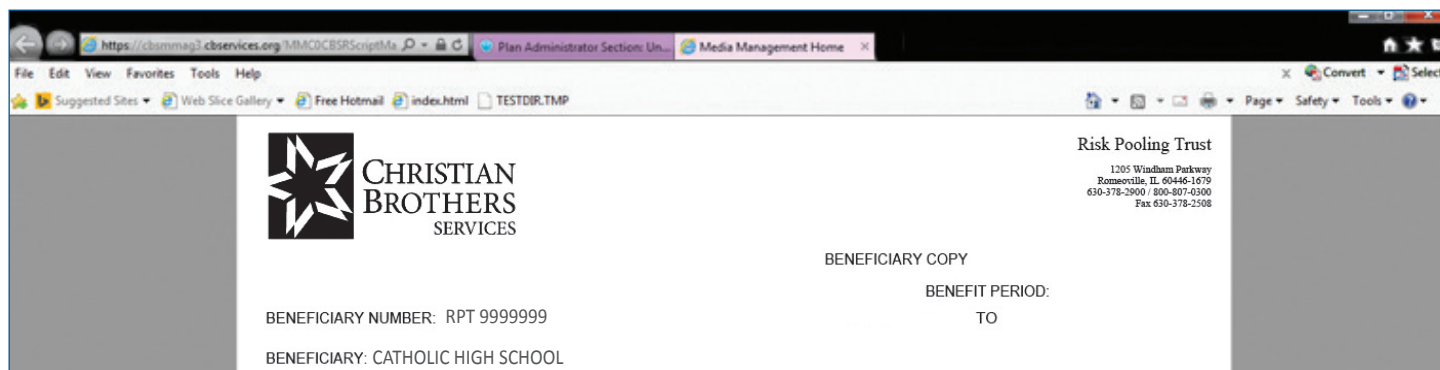
If you are an Agent, select Agent from the Recipient drop down menu.

NOTE: If Adobe Acrobat is not installed on your computer, please download a free copy of the program by visiting www.adobe.com. Once installed, Adobe Acrobat Reader will display an exact replica of the Underwriting Document in a PDF format. You may scroll through the document or print all or sections of the document. Remember, the Account Info Section of the Plan Administrator website is your online filing cabinet. While we will continue to send you hard copies if requested, we hope this feature will reduce the amount of paperwork necessary to administer your participation in the Risk Pooling Trust.

Underwriting Documents

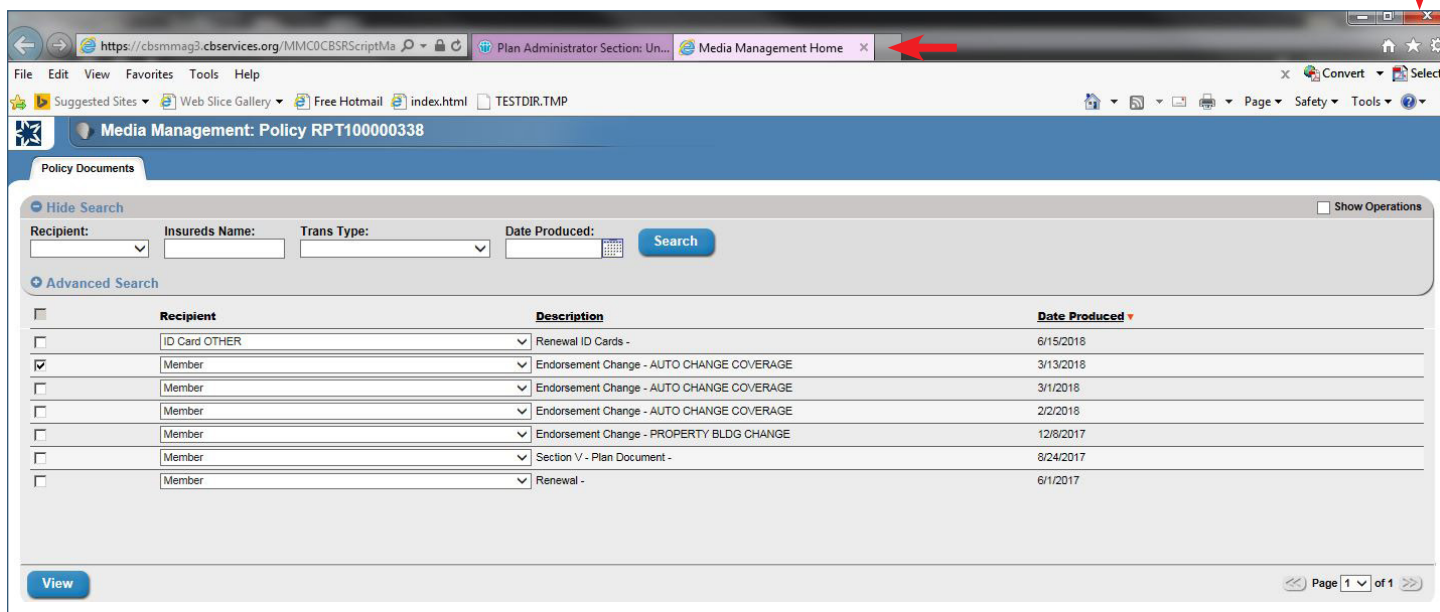
To close the PDF document, click on the red 'X' in the upper right corner of your browser window and click on *Close current tab*, or click on 'X' on the last tab.

Exit screen



This will return you to the Media Management screen. Select another document from the list or to exit this screen and return to the Underwriting Documents screen, click on the 'X' in the upper right corner of your browser window and again, click on the *Close current tab*, or click on the 'X' on the last tab.

Exit screen



Auto Insurance ID Cards

You are able to retrieve online Auto Insurance ID Cards by clicking the Underwriting Documents link.

From the RPT Account Menu (sample screen on page 7), locate and click on Underwriting Documents.

Underwriting Documents screen

CHRISTIAN BROTHERS SERVICES

My Account | Logout
Welcome

Administrator's Section 403b Employee Benefit Trust Employee Retirement Plan Religious Medical Trust Risk Pooling Trust Student Accident Plan

9999999 - Catholic High School | Update Organization

Choose Another Account

Vehicle Schedule
Property Schedule
Certificates of Insurance
Builder's Risk Schedule
Watercraft Schedule
Underwriting Documents
Underwriting Documents
Additional Member Documents
Claims

Underwriting Documents

Now you can view billing statements, renewal information, auto ID cards, and updated schedules online that you would normally receive as hard copy through the mail.

Click on the Plan Year for more detail.

Property Casualty	Workers Comp border
2017-2018	2018
2016-2017	2017
2015-2016	2016

To view a document, select the checkbox to the left of the recipient column and then click "View" at the bottom.

Click the plan year you wish to view.

Select the date the Endorsement Change - Auto Change Coverage transaction was processed.
Print the card and keep it with your vehicle at all times.

Media Management: Policy 999999999

Policy Documents

Hide Search

Recipients: Insureds Name: Trans Type: Date Produced: Search

Advanced Search

	Recipient	Description	Date Produced
☒	ID Card OTHER	Renewal ID Cards -	6/15/2018
☐	Member	Endorsement Change - AUTO CHANGE COVERAGE	3/13/2018
☐	Member	Endorsement Change - AUTO CHANGE COVERAGE	3/1/2018
☐	Member	Endorsement Change - AUTO CHANGE COVERAGE	2/2/2018
☐	Member	Endorsement Change - PROPERTY BLDG CHANGE	12/8/2017
☐	Member	Section V - Plan Document -	6/24/2017
☐	Member	Renewal -	6/1/2017

View

Page 1 of 1

To view an Auto ID Card, click in the check box to the left of the Recipient, click on the drop down box to the right of Member and select ID CARD OTHER, then click 'View' at the bottom of the page.

Auto Insurance ID Cards

Auto ID Card in PDF format

To exit this screen, and return to the Media Management screen, click on the red 'X' located in the upper right corner.

NAIC# 12345 LOC#: 9999999

ILLINOIS INSURANCE IDENTIFICATION CARD

COMPANY NUMBER 00000 COMPANY Old Republic Insurance Company ☒ COMMERCIAL ☐ PERSONAL

POLICY NUMBER CBS 12345 EFFECTIVE DATE 06/15/2018 EXPIRATION DATE 06/15/2019

YEAR 2015 MAKE / MODEL Chevy Impala VEHICLE IDENTIFICATION NUMBER 12345678912345678

AGENCY/COMPANY ISSUING CARD
ARTEX RISK SOLUTIONS, INC.
2850 Golf Road FL 5
Rolling Meadows, IL 60008-4050
800-807-0300

INSURED
Catholic High School 9999999

Auto Insurance ID Cards are available for all states EXCEPT New York that were processed through endorsements. For these New York ID cards, call CBS 800.807.0300, press '3.'

Underwriting Documents screen

CHRISTIAN BROTHERS SERVICES

My Account | Logout
Welcome

Administrator's Section 403b Employee Benefit Trust Employee Retirement Plan Religious Medical Trust Risk Pooling Trust Student Accident Plan

9999999 - Catholic High School | Update Organization Choose Another Account

Vehicle Schedule
Property Schedule
Certificates of Insurance
Builder's Risk Schedule
Watercraft Schedule
Underwriting Documents
Underwriting Documents
Additional Member Documents
Claims

Underwriting Documents

Now you can view billing statements, renewal information, auto ID cards, and updated schedules online that you would normally receive as hard copy through the mail.
Click on the Plan Year for more detail.

Property Casualty	Workers Comp border
2017-2018	2018
2016-2017	2017
2015-2016	2016

To view a document, select the checkbox to the left of the recipient column and then click "View" at the bottom.

To access a list of Renewal ID Cards, select the previous plan year.

Media Management: Policy 999999999

Policy Documents

Hide Search
Recipient: Insureds Name: Trans Type: Date Produced: Search

Advanced Search

Recipient	Description	Date Produced
☒ ID Card OTHER	Renewal	6/15/2018
☐ Member	Endorsement Change - AUTO CHANGE COVERAGE	3/13/2018
☐ Member	Endorsement Change - AUTO CHANGE COVERAGE	3/1/2018
☐ Member	Endorsement Change - AUTO CHANGE COVERAGE	2/2/2018
☐ Member	Endorsement Change - PROPERTY BLDG CHANGE	12/6/2017
☐ Member	Section V - Plan Document -	8/24/2017
☐ Member	Renewal -	6/1/2017

View Page 1 of 1

Locate Renewal ID Cards and click the checkbox to the left of the Recipient for ID Card OTHER than click "View" at the bottom of the page.

Claim History and Summary

Click on the All Claims link to view your complete list of claims.

From the RPT Account Menu (sample screen on page 7), locate and click on Claims.

CHRISTIAN BROTHERS SERVICES

My Account | Logout
Welcome: _____

Administrator's Section 403b Employee Benefit Trust Employee Retirement Plan Religious Medical Trust Risk Pooling Trust Student Accident Plan

| Update Organization

Choose Another Account

Vehicle Schedule
Property Schedule
Certificates of Insurance
Builder's Risk Schedule
Watercraft Schedule
Underwriting Documents
Claims
All Claims
Open Claims
Closed Claims
Report a Claim

All Vehicles Export List

Information as of Monday 11/12/2018. Changes made to vehicles will not be displayed until the requests have been processed.

Click on a Vehicle to Remove, Transfer, Trade-in or Change

Add Vehicle

Click on the blue column header to sort vehicles by that column.

Site	Unit	Year	Vehicle	VIN	Cov.	Contribution
------	------	------	---------	-----	------	--------------

All Claims screen

You may sort claims by clicking on the blue column header.

Select a claim number to view specific details.

Click links to view sites info.

CHRISTIAN BROTHERS SERVICES

My Account | Logout
Welcome: _____

Administrator's Section 403b Employee Benefit Trust Employee Retirement Plan Religious Medical Trust Risk Pooling Trust Student Accident Plan

| Update Organization

Choose Another Account

Claims
Claims Summary Report
- Property / General Liability Sites
- Workers Compensation Sites

All Claims Export List

AL, *GL, PY, WC - Claim data is based on the Date of Loss for the last five Plan Years.

*Sexual Misconduct, Director & Officers, Errors & Omission including School Board Legal, Employee Benefits Liability, Internet and Network Liability is based on Date Reported versus Date of Loss. The claims information was last updated as of 10/02/2016. The claim list is updated weekly.

Coverage Key: AL = Auto, GL = General Liability, PY = Property, WC = Workers' Comp

Click on the blue column header to sort vehicles by that column.

Site	Date of Loss	Days to Report	Date Reported	Status	Coverage	Claim Number	Driver Name	Party with Claim Interest	Cause Description	Accident State	*Total Incurred
------	--------------	----------------	---------------	--------	----------	--------------	-------------	---------------------------	-------------------	----------------	-----------------

Claim Summary Report

You can view the total of your loss experience or a summary of all claims by line of coverage and plan year.

From the RPT Account Menu (sample screen on page 7), click on Claims and then Claim Summary Report.

Catholic High School 99999999

Vehicle Schedule

Property Schedule

Certificates of Insurance

Builder's Risk Schedule

Watercraft Schedule

Underwriting Documents

Claims

All Claims

Open Claims

Closed Claims

Report a Claim

Claim Summary Report

Risafacs.com

Risk Control

Documentation

Contact Us

Claim Summary Report:

Information current as of 10/02/2016 .

Line of Coverage: Auto

Plan Year	# Claims	# Features	Total Incurred	Largest Feature	Largest Claim
2014 - 2015	1	2	\$000.00	\$000.00	\$000.00
2015 - 2016	2	3	\$000.00	\$000.00	\$000.00
2016 - 2017	4	7	\$000.00	\$000.00	\$000.00
2017 - 2018	2	3	\$000.00	\$000.00	\$000.00
Totals:	9	15	\$000.00		

* Plan years runs from June 15 to June 14.

Line of Coverage: Liability

Plan Year	# Claims	# Features	Total Incurred	Largest Feature	Largest Claim
2014 - 2015	3	3	\$000.00	\$000.00	\$000.00
2015 - 2016	2	2	\$000.00	\$000.00	\$000.00
2016 - 2017	2	2	\$000.00	\$000.00	\$000.00
Totals:	7	7	\$000.00		

* Plan years runs from June 15 to June 14.

Line of Coverage: Property

Plan Year	# Claims	# Features	Total Incurred	Largest Feature	Largest Claim
2014 - 2015	2	2	\$000.00	\$000.00	\$000.00
2015 - 2016	2	2	\$000.00	\$000.00	\$000.00
2016 - 2017	4	4	\$000.00	\$000.00	\$000.00
Totals:	8	8	\$000.00		

* Plan years runs from June 15 to June 14.

Line of Coverage: Workers' Compensation

Plan Year	# Claims	# Features	Total Incurred	Largest Feature	Largest Claim
2014	1	1	\$000.00	\$000.00	\$000.00
2015	2	2	\$000.00	\$000.00	\$000.00
Totals:	3	3	\$000.00		

* Plan years run from January 1st to December 31st.

NOTE: All claim information is confidential and protected against unauthorized access for hacking from outsiders. This may result in a slight delay of up to 10 seconds for the information to be retrieved.

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Report a Claim

From the RPT Account Menu (sample screen on page 7), you are able to report a claim.
Locate and click on Claims and then click on Report a Claim.

CHRISTIAN BROTHERS SERVICES

My Account | Logout
Welcome

Administrator's Section 403b Employee Benefit Trust Employee Retirement Plan Religious Medical Trust Risk Pooling Trust Student Accident Plan

Catholic High School 9999999 | Update Organization

Choose Another Account

Vehicle Schedule
Property Schedule
Certificates of Insurance
Builder's Risk Schedule
Watercraft Schedule
Underwriting Documents
Claims
All Claims
Open Claims
Closed Claims
Report a Claim

Report a Claim

Create Claim For:

1. Type of claim: Automobile

2. The Occurrence Date of the claim:

Create Claim

Select type of claim to report from the drop down box. Select the date the accident or event occurred and then click the Create Claim button.

Report a Claim screen

CHRISTIAN BROTHERS SERVICES

My Account | Logout
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Administrator's Section 403b Employee Benefit Trust Employee Retirement Plan Religious Medical Trust Risk Pooling Trust Student Accident Plan

Catholic High School 9999999 | Update Organization

Choose Another Account

Vehicle Schedule
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Certificates of Insurance
Builder's Risk Schedule
Watercraft Schedule
Underwriting Documents
Claims
All Claims
Open Claims
Closed Claims
Report a Claim
Claim Summary Report

Report a Claim

Create Claim For:

1. Type of claim:

2. The Occurrence Date of the claim:

Automobile
General Liability
Property
Workers Compensation
Joint - Automobile / Property
Joint - Automobile / General Liability
Joint - Property / General Liability
Joint - Automobile / Property / General Liability

Report a Claim

A vehicle schedule will appear for auto claims; a property schedule will appear for a general liability or property claim. Site address will appear for workers' compensation claims. Choose the applicable vehicle or site.

Automobile Claim Report screen

All Vehicles Export List

To Report an Automobile Claim, Select the Applicable Covered Vehicle

If you cannot locate the appropriate vehicle in the list below, please contact Christian Brothers Risk Management Services at 1-800-807-0300.

To fill out a blank Automobile Claim form, click [here](#). Click here for a blank form. Add Vehicle

Click on the blue column header to sort vehicles by that column.

Site	Unit	Year	Vehicle	VIN	Cov.	Contribution
0	14	2001	CHEVROLET	123456789000000000	F	\$0,000.00
0	16	2004	DODGE	123456700000000000	F	\$0,000.00
0	19	1994	FORD	123400000000000567	L	\$0,000.00

Property Claim Report screen

Property Schedule Export List

To Report a Property Claim, Select the Applicable Covered Property

If you cannot locate the appropriate building in the list below, please contact Christian Brothers Risk Management Services at 1-800-807-0300.

Click on a Building to Remove or Change Add Property

Site	Address	City	State
1	1234 Main Street	Somewhere	IL
2	5678 Second Street	Some Town	IN

Building						Contents		
Site	ID	Building Name	OC	RC/AV	Value	Contrib.	Value	Contrib.
1	1	Catholic High School	HS	AV	\$0,000,000	\$0,000	\$000,000	\$000
2	1	Religious Residence	RE	AV	\$0,000,000	\$0,000	\$000,000	\$000
Totals:					\$0,000,000			

General Liability Claim Report screen

General Liability Claim Report:

Main Menu > Select an Account > RPT Account Menu > Report a Claim > Property Schedule

To Report a General Liability Claim, Select the Applicable Covered Property

If you cannot locate the appropriate building in the list below, please contact Christian Brothers Risk Management Services at 1-800-807-0300.

To fill out a blank General Liability Claim form, click [here](#). Click here for a blank form.

Site	Address	City	State
1	123 Hometown Drive	Pleasantville	TX

Building						Contents		
Site	ID	Building Name	OC	RC/AV	Value	Contrib.	Value	Contrib.
2	1	Catholic School	HS	AV	\$0,000,000	\$0,000	\$000,000	\$000
Totals:					\$0,000,000			

Workers' Compensation Claim Report screen

Workers Compensation Claim Report: 9999999 - Catholic High School

Main Menu > Select an Account > RPT Account Menu > Report a Claim > Workers Compensation Claim Report

To Report a Workers Compensation Claim, Select the Applicable Site where the Incident Occurred

If you cannot locate the appropriate site in the list below, please contact Christian Brothers Risk Management Services at 1-800-807-0300.

To fill out a blank Workers Compensation Claim form, click [here](#). Click here for a blank form.

Site	Site Name	Address	City	State
	Catholic High School	P. O. Box 1234	Anytown	

[Back to Account Menu](#)



CHRISTIAN
BROTHERS
SERVICES

Risk Management Services

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800.807.0300 • rmscustomerservice@cbservices.org