

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 top navigation bar of the Christian Brothers Services website. The logo is on the left, followed by menu items: ABOUT, SERVICES, RESOURCES & TOOLS, MyCBS, PROVIDERS, and LOGIN. A search icon is to the right of the LOGIN menu. Below the navigation bar is a large banner image featuring a group of people, including a priest, a man in a suit, a woman, and several children. Overlaid on the right side of the banner is a blue 'Account Login' form with 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. Below the banner, the text reads: 'Christian Brothers Services exemplifies the Lasallian tradition by understanding'.

Click New Users Signup Here link.

Registration

The Registration page will appear; click Register for Administrators.

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: <input type="text"/>
Last Name:	<input type="text"/>
First Name:	<input type="text"/>
Birthday:	(Month/Day) 01 ▾ / 01 ▾
Job Title:	<input type="text"/>
Organization:	<input type="text"/>
C/O Line 1:	<input type="text"/>
C/O Line 2:	<input type="text"/>
Address Line 1:	<input type="text"/>
Address Line 2:	<input type="text"/>
Address Line 3:	<input type="text"/>
Address Line 4:	<input type="text"/>
City:	<input type="text"/>
State:	--- ▾ Zip <input type="text"/>
Phone:	<input type="text"/> ext. <input type="text"/>
Fax:	<input type="text"/>
Email Address:	<input type="text"/>
Alternate Mailing Address: (if you wish to receive mail somewhere other than the organization)	
C/O Line 1:	<input type="text"/>
C/O Line 2:	<input type="text"/>
Address Line 1:	<input type="text"/>
Address Line 2:	<input type="text"/>
Address Line 3:	<input type="text"/>
Address Line 4:	<input type="text"/>
City:	<input type="text"/>
State:	--- ▾ Zip <input type="text"/>
Security Information: (all fields are required)	
<i>The following will be used for identity verification purposes</i>	
(Characters not allowed: space, ?, /, \$)	
Username:	<input type="text"/> (4-25 characters)
Password:	<input type="text"/> (6-10 characters)
Confirm Password:	<input type="text"/>
Question:	In which city were you born? ▾
Answer:	<input type="text"/> (must be different from password)
Question:	In which city were you born? ▾
Answer:	<input type="text"/> (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:
<input type="checkbox"/> Employee Benefit Trust	<input type="text"/>	<input type="radio"/> Main <input type="radio"/> Secondary
<input type="checkbox"/> Religious Medical Trust	<input type="text"/>	<input type="radio"/> Main <input type="radio"/> Secondary
<input checked="" type="checkbox"/> Risk Pooling Trust	<input type="text"/>	<input checked="" type="radio"/> Main <input checked="" type="radio"/> Secondary
<input type="checkbox"/> Student Accident Plan	<input type="text"/>	<input type="radio"/> Main <input type="radio"/> Secondary
<input type="checkbox"/> 401k Plan	<input type="text"/>	<input type="radio"/> Main <input type="radio"/> Secondary
<input type="checkbox"/> 403b Plan	<input type="text"/>	<input type="radio"/> Main <input type="radio"/> Secondary
<input type="checkbox"/> Employee Retirement Plan <small>(Part 2 of registration; You will receive a security form via email.)</small>	<input type="text"/>	<input type="radio"/> Main <input type="radio"/> 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.

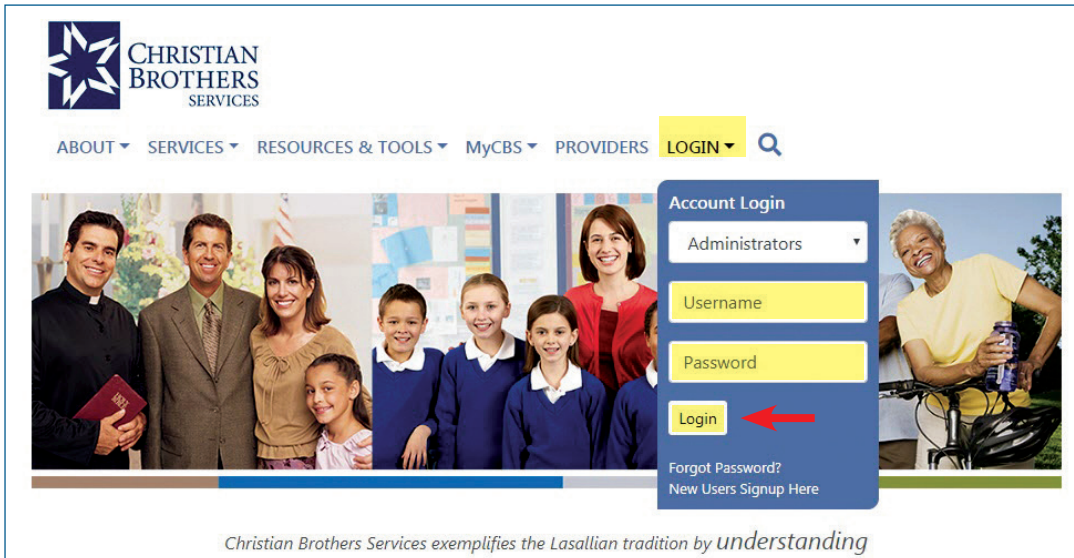
Submit



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 Menu

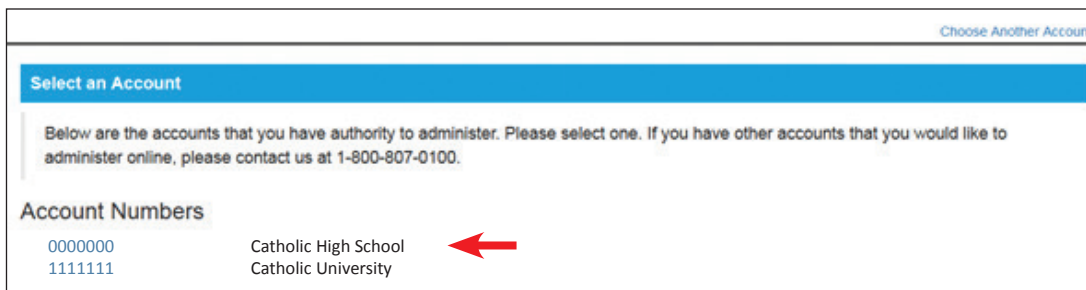
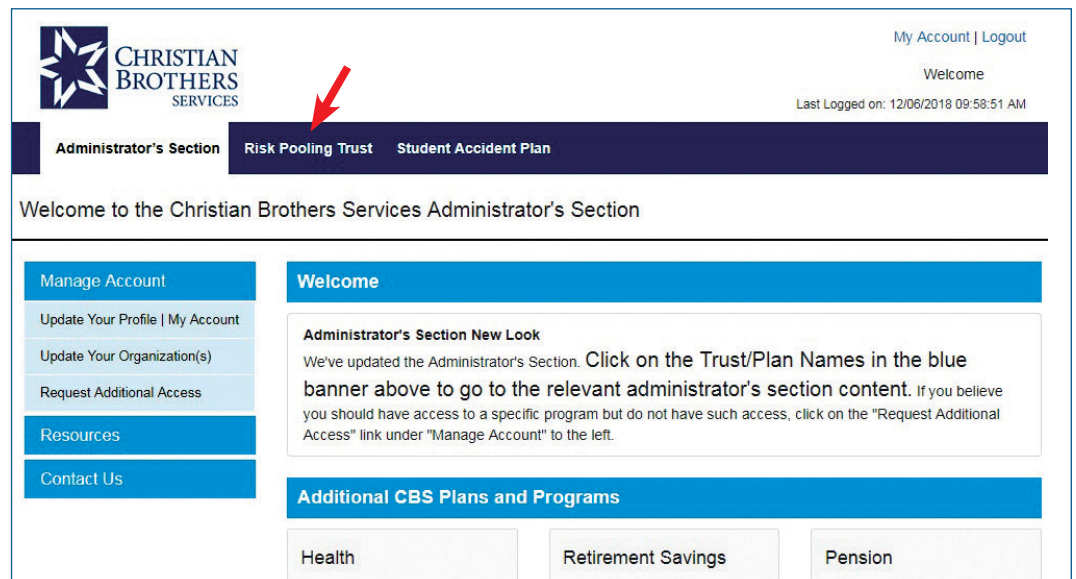
Log on to cbservices.org and access your account using your username and password.



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

Welcome screen

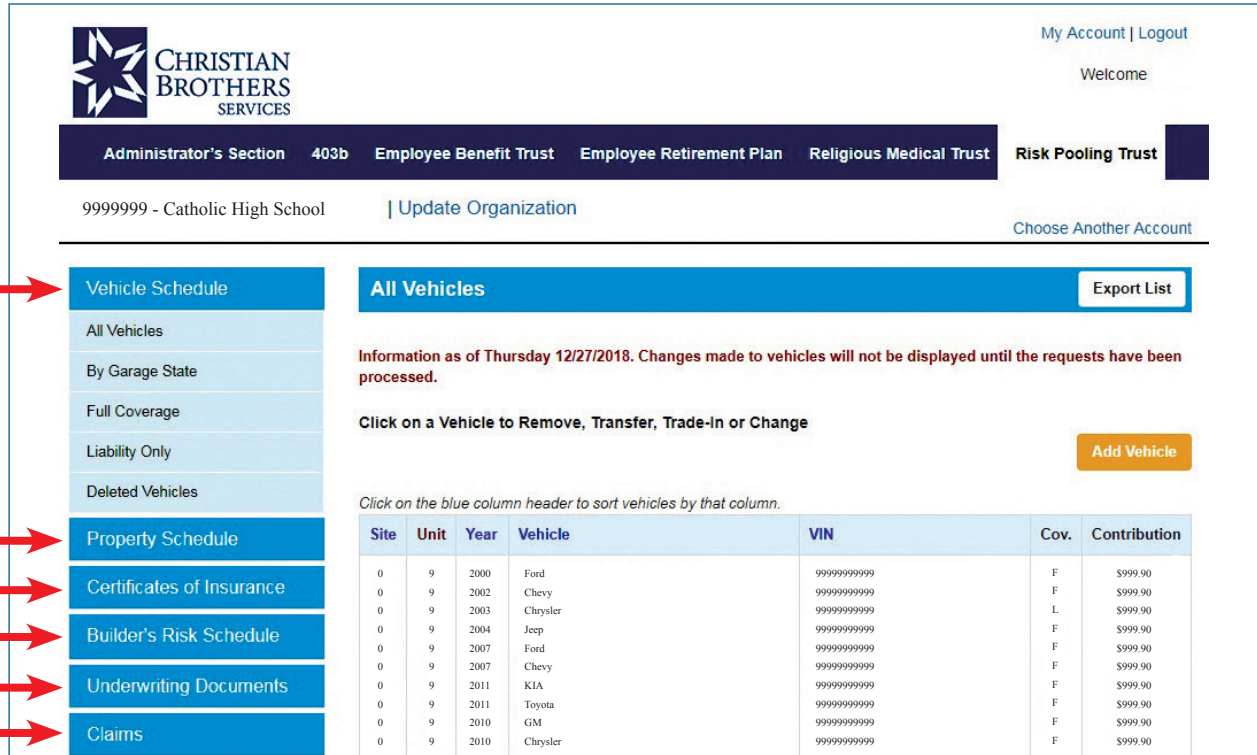
On the Welcome page, click Risk Pooling Trust in the blue banner.



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 [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

2 → Property Schedule

3 → Certificates of Insurance

4 → Builder's Risk Schedule

5 → Underwriting Documents

6 → Claims

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.

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

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 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	Jeep	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: Any State

*Plate State: Any 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):	-	-
VN 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:	<input checked="" type="radio"/> Organization <input type="radio"/> Individual <input type="radio"/> 2 Individuals	<input checked="" type="radio"/> Organization <input type="radio"/> Individual <input type="radio"/> 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 **Export List**

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 **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		\$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 Export List

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:								

Add Project

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

The screenshot shows the 'Certificate of Insurance' form on the Christian Brothers Services website. The page header includes the logo and 'CHRISTIAN BROTHERS SERVICES' on the left, and 'My Account | Logout' and 'Welcome' on the right. A navigation bar contains links for 'Administrator's Section', '403b', 'Employee Benefit Trust', 'Employee Retirement Plan', 'Religious Medical Trust', 'Risk Pooling Trust', and 'Student Accident Plan'. Below the navigation bar, the account name '9999999 - Catholic High' and an 'Update Organization' link are visible. A 'Choose Another Account' link is also present. The main content area is divided into a left sidebar with menu items: 'Vehicle Schedule', 'Property Schedule', 'Certificates of Insurance', 'Request Certificate of Insurance', 'Builder's Risk Schedule', 'Watercraft Schedule', 'Underwriting Documents', 'Claims', 'Risk Control', 'Documentation', and 'Contact Us'. The 'Request Certificate of Insurance' link is highlighted. The main form area is titled 'Certificate of Insurance' and contains two sections: 'Location Information' and 'Certificate Holder'. The 'Location Information' section includes fields for 'Location #' (9999999), '*Location Name' (Catholic High School), '*Location Phone' ((000) 000-0000), '*Location Fax' ((000) 000-0000), and '*Contact' (Jane Smith). The 'Certificate Holder' section includes fields for '*Certificate Holder' (30 characters or less), '*Attention', '*Address' (30 characters or less), and '*City'. A note '(Party requesting evidence of coverage)' is displayed above the 'Certificate Holder' section.

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:	<input type="text"/>
*Agreement Type:	<input type="radio"/> Written <input type="radio"/> Verbal <small>(If written, please submit a copy of the ENTIRE Contract Agreement, prior to signing it.)</small>
Attach Contract / Lease Agreement:	<small>Please re-attach your attachment(s) if the form fails to submit.</small> <input type="text"/> <input type="button" value="Browse..."/> <input type="text"/> <input type="button" value="Browse..."/> <input type="text"/> <input type="button" value="Browse..."/> <input type="text"/> <input type="button" value="Browse..."/>
*Is this Certificate for an event?	<input type="radio"/> Yes <input type="radio"/> No
*Type of event:	<input type="text"/>
*Dates/Times of Event:	<input type="text"/>
Evidence of Coverage:	
*Show Coverage of:	<input type="checkbox"/> Automobile <input type="checkbox"/> Property <input type="checkbox"/> General/Excess Liability <input type="checkbox"/> Professional Liability <input type="checkbox"/> Workers' Comp <input type="checkbox"/> Other
*If Other, please specify:	<input type="text"/>
*Type of Certificate Holder:	<input type="checkbox"/> Evidence of Coverage Only <input type="checkbox"/> Additional Insured <input type="checkbox"/> Loss Payee <input type="checkbox"/> Mortgagee
*Delivery:	<input checked="" type="radio"/> Mail <input type="radio"/> Fax <input type="radio"/> Email
Additional Comments:	
<input type="text"/>	
Approval Information	
*Effective Date	<input type="text"/>
Requested By:	Jane Smith
Requested Date:	01/01/2019
Transaction #:	0000-000000
<input type="button" value="Cancel"/> <input type="button" value="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	99999999999	F	\$999.90
0	9	2002	Chevy	99999999999	F	\$999.90
0	9	2003	Chrysler	99999999999	L	\$999.90
0	9	2004	Jeep	99999999999	F	\$999.90
0	9	2007	Ford	99999999999	F	\$999.90
0	9	2007	Chevy	99999999999	F	\$999.90
0	9	2011	KIA	99999999999	F	\$999.90
0	9	2011	Toyota	99999999999	F	\$999.90
0	9	2010	GM	99999999999	F	\$999.90
0	9	2010	Chrysler	99999999999	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 | Update Organization Choose Another Account

Vehicle Schedule
Property Schedule
Certificates of Insurance
Builder's Risk 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 Show Operations

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

Advanced Search

Recipient	Description	Date Produced
<input type="checkbox"/>	ID Card OTHER Renewal ID Cards -	6/15/2018
<input checked="" type="checkbox"/>	Member Endorsement Change - AUTO CHANGE COVERAGE	3/13/2018
<input type="checkbox"/>	Member Endorsement Change - AUTO CHANGE COVERAGE	3/1/2018
<input type="checkbox"/>	Member Endorsement Change - AUTO CHANGE COVERAGE	2/2/2018
<input type="checkbox"/>	Member Endorsement Change - PROPERTY BLDG CHANGE	12/8/2017
<input type="checkbox"/>	Member Section V - Plan Document -	8/24/2017
<input type="checkbox"/>	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.

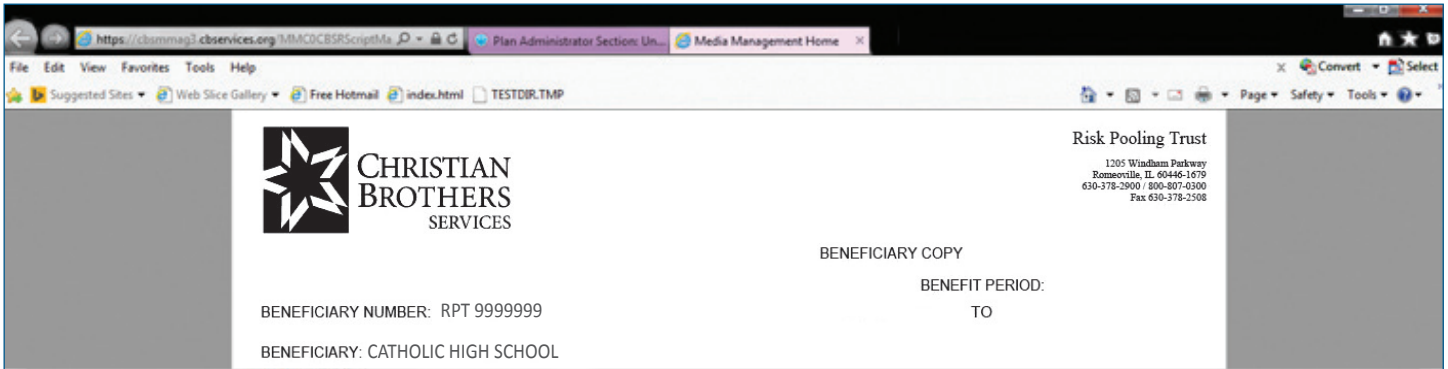
If you are an Agent, select Agent from the Recipient drop down menu.

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

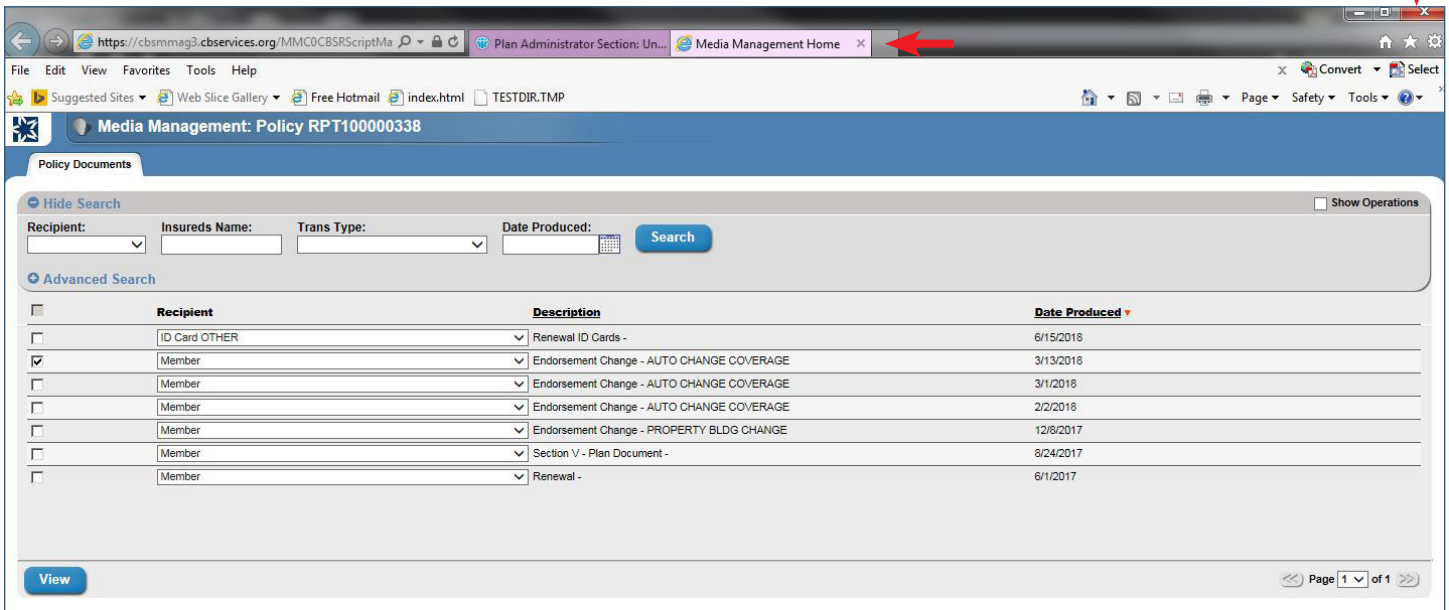
To close the PDF document, click on the red 'X' in the upper right corner of your browser window and click on *Close current tab*, or click on 'X' on the last tab.

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 Show Operations

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

Advanced Search

Recipient	Description	Date Produced
<input checked="" type="checkbox"/>	ID Card OTHER	6/15/2018
<input type="checkbox"/>	Member	3/13/2018
<input type="checkbox"/>	Member	3/1/2018
<input type="checkbox"/>	Member	2/2/2018
<input type="checkbox"/>	Member	12/8/2017
<input type="checkbox"/>	Member	8/24/2017
<input type="checkbox"/>	Member	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	Underwriting Documents								
Property Schedule	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.								
Certificates of Insurance	Click on the Plan Year for more detail.								
Builder's Risk Schedule	<table border="1"> <thead> <tr> <th>Property Casualty</th> <th>Workers Comp border</th> </tr> </thead> <tbody> <tr> <td>2017-2018</td> <td>2018</td> </tr> <tr> <td>2016-2017</td> <td>2017</td> </tr> <tr> <td>2015-2016</td> <td>2016</td> </tr> </tbody> </table>	Property Casualty	Workers Comp border	2017-2018	2018	2016-2017	2017	2015-2016	2016
Property Casualty	Workers Comp border								
2017-2018	2018								
2016-2017	2017								
2015-2016	2016								
Watercraft Schedule									
Underwriting Documents									
Underwriting Documents									
Additional Member Documents									
Claims									

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 Show Operations

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

Advanced Search

Recipient	Description	Date Produced
<input checked="" type="checkbox"/> ID Card OTHER	Renewal	6/15/2018
<input type="checkbox"/> Member	Endorsement Change - AUTO CHANGE COVERAGE	3/13/2018
<input type="checkbox"/> Member	Endorsement Change - AUTO CHANGE COVERAGE	3/1/2018
<input type="checkbox"/> Member	Endorsement Change - AUTO CHANGE COVERAGE	2/2/2018
<input type="checkbox"/> Member	Endorsement Change - PROPERTY BLDG CHANGE	12/6/2017
<input type="checkbox"/> Member	Section V - Plan Document -	8/24/2017
<input type="checkbox"/> 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.

The screenshot shows the Christian Brothers Services website interface. At the top, there is a navigation bar with the company logo and several menu items: Administrator's Section, 403b, Employee Benefit Trust, Employee Retirement Plan, Religious Medical Trust, Risk Pooling Trust, and Student Accident Plan. Below this is a section for 'Update Organization' and 'Choose Another Account'. The main content area is titled 'All Vehicles' and includes an 'Export List' button. A message states: 'Information as of Monday 11/12/2018. Changes made to vehicles will not be displayed until the requests have been processed.' Below this is a link to 'Click on a Vehicle to Remove, Transfer, Trade-in or Change' and an 'Add Vehicle' button. A table header is visible with columns: Site, Unit, Year, Vehicle, VIN, Cov., and Contribution. On the left side, there is a navigation menu with items: Vehicle Schedule, Property Schedule, Certificates of Insurance, Builder's Risk Schedule, Watercraft Schedule, Underwriting Documents, Claims, All Claims, Open Claims, Closed Claims, and Report a Claim. A red arrow points to the 'Claims' link in this menu.

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.

The screenshot shows the 'All Claims' screen on the Christian Brothers Services website. The navigation bar is the same as in the previous screenshot. The main content area is titled 'All Claims' and includes an 'Export List' button. A message states: 'AL, *GL, PY, WC - Claim data is based on the Date of Loss for the last five Plan Years.' Below this is a note: '*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.' A 'Coverage Key' is provided: 'AL = Auto, GL = General Liability, PY = Property, WC = Workers' Comp'. Below this is a table with columns: Site, Date of Loss, Days to Report, Date Reported, Status, Coverage, Claim Number, Driver Name, Party with Claim Interest, Cause Description, Accident State, and *Total Incurred State. On the left side, there is a navigation menu with items: Claims, Claims Summary Report, - Property / General Liability Sites, and - Workers Compensation Sites. Red arrows point to the 'Export List' button, the 'Claims Summary Report' link, the 'Date of Loss' column header, and the 'Driver Name' column header.

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
- Risifacts.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.

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
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
Claim Summary Report

Report a Claim

Create Claim For:

1. Type of claim: Automobile
General Liability
Property
Workers Compensation
Joint - Automobile / Property
Joint - Automobile / General Liability
Joint - Property / General Liability
Joint - Automobile / Property / General Liability

2. The Occurrence Date of the claim:

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	12340000000000567	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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