IntelliRisk® Quick Reference Guide – Broker

Log-in

1. Log in with the email address and password you used for AIG Broker Services registration.

   www.myaig.com

   If you have forgotten your password, click on the **Forgot Password** link and follow the prompts.

Overview
Policy Dashboard View

1 Search – Use the Client, Account/D&B or Policy search to populate grid with the policies to which you have access.

2 Dashboard containers (Policies, Create Report, Financial Summary, Open Claims) can be rearranged as desired. Click on the icon and drag the container to the desired area. Minimize a container by clicking on the icon.

3 Click on the **Save View** button to keep that dashboard arrangement.

4 Policy and Claim hyperlinks drill down to detail information.

5 Create reports right from the dashboard.

6 View data in pie chart, bar graph or list format.

7 Click on claim list hyperlinks to view individual claim details.

8 Click on a navigation bar link to access that function.

Getting Started

To view your data and run reports you must first conduct a search. Select your view prior to your search.

1. In the **Policies** container, prior to initiating the search you must select whether the policy coverage is International or in the U.S./Canada. Then you can enter the policy number or insured name.
2. Click on the icon.
3. The container will populate with the policies you have access to.
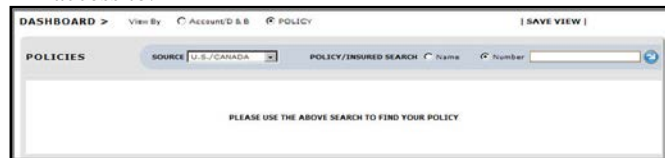
Produce a Loss Run

From Dashboard View - Single Policy Report

1. Select report type and other report criteria from the drop down lists, and select report format.

2. Click on **Submit**. The Reports Library will display, listing requested reports and status of same (e.g., **Processing**).
3. Click on the **Refresh** link to update the report Status.
4. When Status is **Download**, click on the hyperlink. The report will appear onscreen.

From Dashboard View - Multiple Policy Report

1. Click on **Select Multiple Policies**. The Reports Library screen will display.
2. Continue to Step 2 of the instructions for creating reports **From the Reports Library** on page 2.

Produce a Loss Run *(continued)*

From the Reports Library

1. Click on the **Reports** link on the navigation bar on the left side of the screen. The Reports Library screen will display.
2. Click on the **Create Report** button on the right side of the screen.
3. Conduct your **Search** to populate the grid with the account/D&B or policies you have access to.
4. Select an account/D&B or up to 20 policies for the report by clicking on the checkbox next to each policy. The data you select will appear in the **Selected** box.
5. Type in a report name, and select the report type and other report criteria.
6. Click on **Submit**. The requested report will appear immediately in grid, with a status of **Processing**.
7. Click on the **Refresh** link to update report Status. When the status changes to **Download**, click on the hyperlink to access the report.

Claim Search

1. Click on the **Claim Search** button on the left side of the screen.
2. Prior to initiating the claim search you must select whether the policy coverage is handled/adjudicated in the U.S./Canada or Internationally. Enter claim number, OneClaim number or claimant name and click on the 🔄 icon. The claim(s) meeting that criterion will display.

File Review

From the Dashboard (Available for Primary AL/GL/WC Open Claims)

1. Select **File Review** on the left side of the screen to request Claim Summary Report.

2. Search by Account, Policy or Claim # and enter selection criteria to filter claims.
3. Click on **Submit.** Results will appear in the **File Review Results** box.
4. From the **File Review Results** box, select up to 10 claims for the report.
5. Name the report and then click on **Submit**. An email will be sent to the Adjuster notifying them of the request. The requested report will appear as scheduled in the **Reports Library** and will be available for download in 30 days.
6. When the status changes to **Download**, the report will be available for 90 days.