



# AR Portal User Guide

## Claims

## Introduction

The purpose of this document is to outline the processes and guidance for the Appointed Representative Portal.

Our Compass Claims Team will manage all claims directly with your customers. If you are notified of a potential claim, this must be reported immediately. The team are available Monday – Friday, 9am - 5pm and operate a 24-hour helpline for notifying claims. Here are some useful contact details:

By telephone	0345 604 9860
By email	compassclaims@uk.sedgwick.com
In writing	Compass Claims, Oakleigh House, 14-16 Park Place, Cardiff CF10 3DQ
Via Website	<a href="https://compass.co.uk/make-a-claim">https://compass.co.uk/make-a-claim</a>
Via AR Portal	<a href="https://portal.compassinsuranceservices.co.uk/Extranet">https://portal.compassinsuranceservices.co.uk/Extranet</a>

You can find out more about the claims process and your role in the AR Handbook, which you can access on the AR Hub, here: <https://www.ar-hub-compassparks.co.uk/ar-compliance-handbook>

## Contents

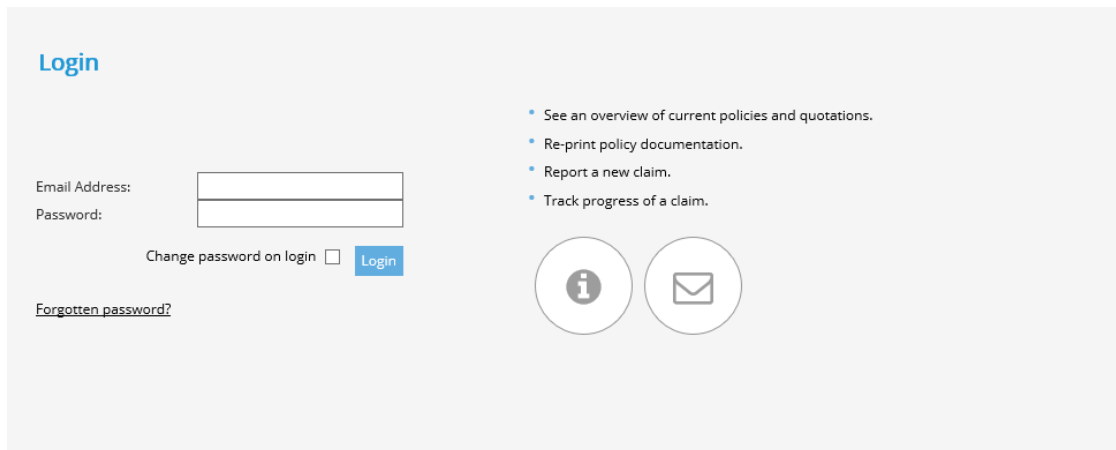
Introduction.....	2
Basic Navigation.....	3
Reporting a Claim via the AR Portal.....	5
Regional Account Manager Areas.....	13

## Basic Navigation

The following link enables you to access the login screen

<https://portal.compassinsuranceservices.co.uk/Extranet/>

This will bring up the following screen



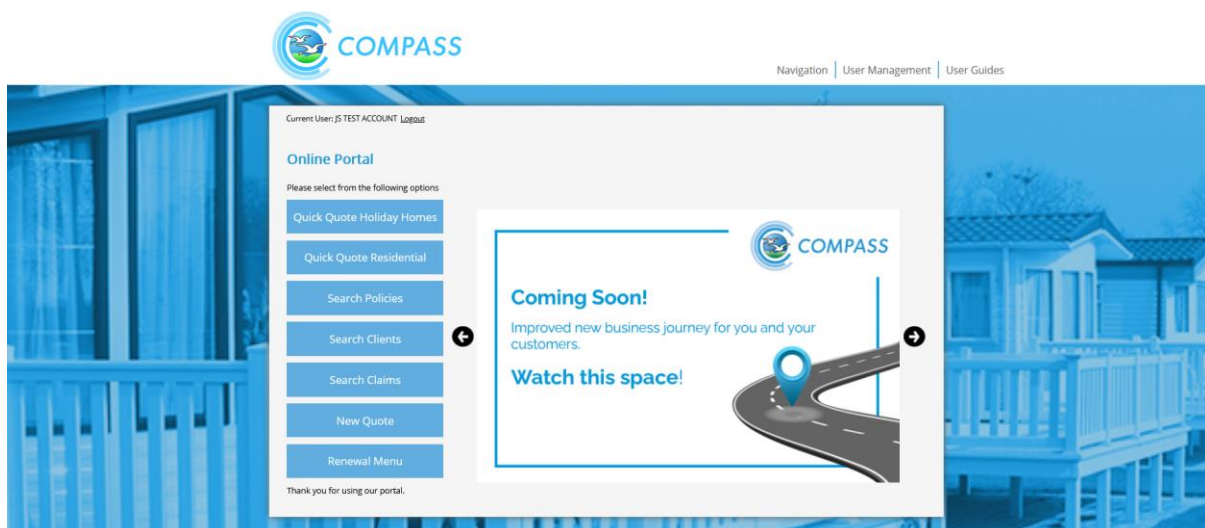
The screenshot shows the login interface for the Compass Insurance Services Extranet. It features a 'Login' heading in blue. On the left, there are input fields for 'Email Address' and 'Password', with a 'Login' button below them. A checkbox labeled 'Change password on login' is also present. Below the password field is a link for 'Forgotten password?'. On the right, there is a list of services: 'See an overview of current policies and quotations.', 'Re-print policy documentation.', 'Report a new claim.', and 'Track progress of a claim.'. At the bottom right, there are two circular icons: one with an 'i' for information and one with an envelope for email.

You will be issued with

- Username
- Password

Enter these into the fields shown and click **Logon**

The home screen of the portal is as follows



From this screen there are quick links to

- Quick Quote Holiday
- Quick Quote Residential
- Search Policies
- Search Clients
- Search Claims
- New Quote
- Renewal Menu

At the bottom of the screen there are also links to Compass information and websites for the user to follow.

The Navigation drop down also allows the user to access various parts of the Portal from any screen in the portal.

The portal does not allow use of the **Back** button on the user's browser and navigation through the screens should only be done using the navigation built into the portal itself.



### Oops!

Please do not use browser navigation buttons. Please use the navigation buttons that this application provides.

Okay

## User Management

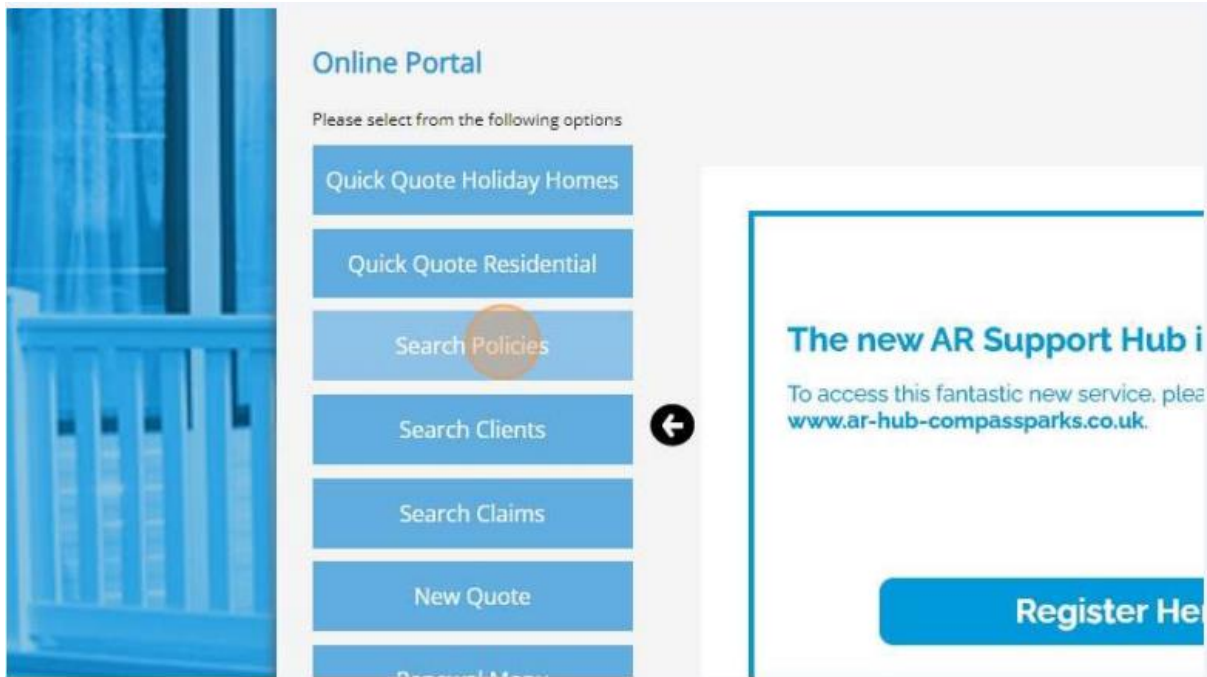
Each member of staff on your Park or within your business who needs to access the Portal will be issued with a logon. You can request these via your Regional Account Manager.

To comply with data security and system access controls the Portal will not allow the following to occur

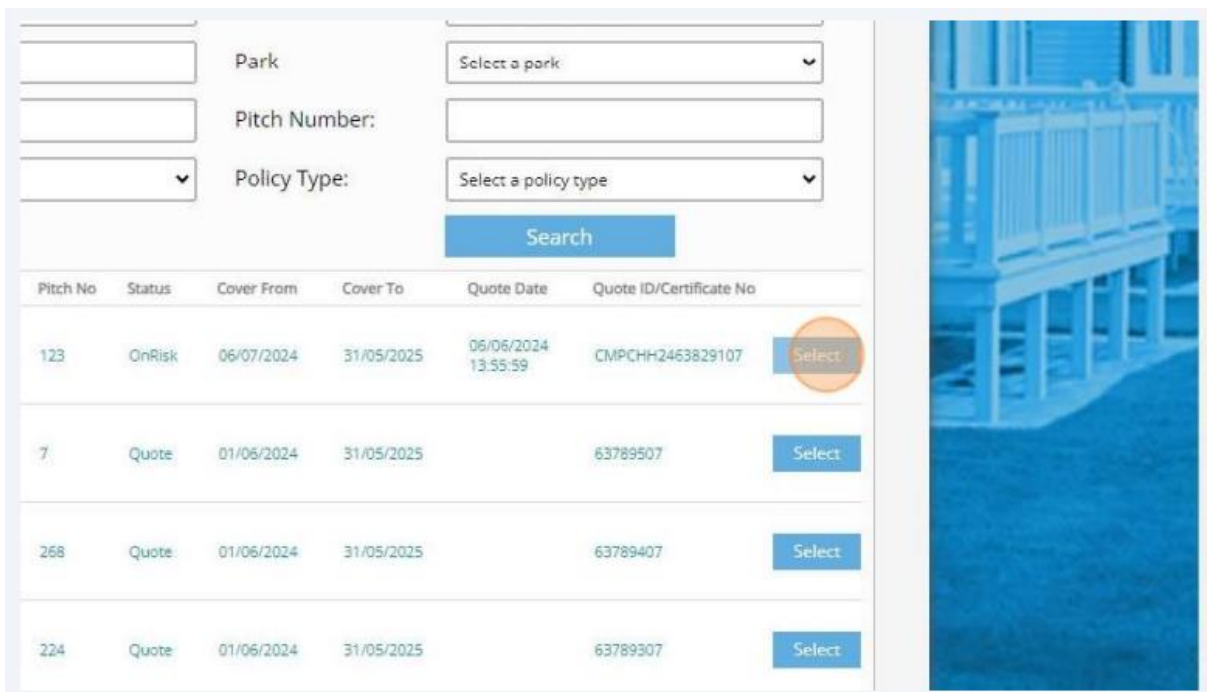
- Multiple users / sessions on the same device
- Multiple sessions for the same user on the same device

## Reporting a Claim via the AR Portal

To add a claim, you'll first need to locate the policy. First, select 'Search Policies':



Complete a search by entering some details, then hitting search. You can then select the policy:



When in the policy, you'll need to click 'Claims':

Client ID: CC01120097  
Cert No: CMPCHH2463829107

Proposer: Mr James Stout  
Country: United Kingdom  
Currency: £

From	Cover To	Total Premium	Tax/Levy/Duty	Select
July 2024	31 May 2025	£227.36	£24.36	Select

Client Details  
MTA Quote  
Documents  
Claims  
Cancel  
Exit

Then 'Add a new claim':

Policy Status: OnRisk

Status	Progress
--------	----------

Holiday Caravan Lodge Insurance  
Policy No: 63829107  
Client ID: CC01120097  
Cert No: CMPCHH2463829107

Proposer: Mr James Stout  
Country: United Kingdom  
Currency: £

Policy Menu  
Add a new claim

While the reported date should be the date you are adding the claim (assuming this is the first notification), the 'Date of Loss' must be the date the loss or damage occurred:

**Policy No:** 63829107      **Policy Status:** OnRisk  
**Policy Holder:** Mr James Stout

**Claim Details**

**Status:** Open

**Date of Loss:** dd/MM/yyyy

**Reported Date:** 11/06/2024

**Loss Code:** [Dropdown Menu]

**Details:**  
Please provide estimated loss amount: [Text Area]

You can select the relevant claim description from the 'Loss Code' drop down:

**Cert No:** CMPCHH2463829107

**Proposer:** Mr James Stout  
**Country:** United Kingdom  
**Currency:** £

**Policy Menu**

[Dropdown Menu]

documentation **Upload Document**

And enter further details in the 'Details' section:

**m Details:**

Country: United Kingdom  
Currency: £

Policy Menu

Status:

Date of Loss:

Reported Date:

Loss Code:

Details:

Please provide estimated loss amount:

**Documentation**

Click the button to upload supporting documentation

Documents already uploaded:
Documents

Then enter an estimate of the value of the loss or damage:

Reported Date:

Loss Code:

Add brief details of claim

Details:

Please provide estimated loss amount:

**Documentation**

Click the button to upload supporting documentation

Documents already uploaded:
No Documents



You can then upload documents relevant to the claim here (you can upload more than one!):

Reported Date: 11/06/2024

Loss Code: Accidental Damage

Add brief details of claim

Details:

Please provide estimated loss amount: 1,500.00

Documentation

Click the button to upload supporting documentation **Upload Document**

Documents already uploaded:
No Documents

**Cancel** **Submit This Claim**

You can drag and drop the files, or click to browse:

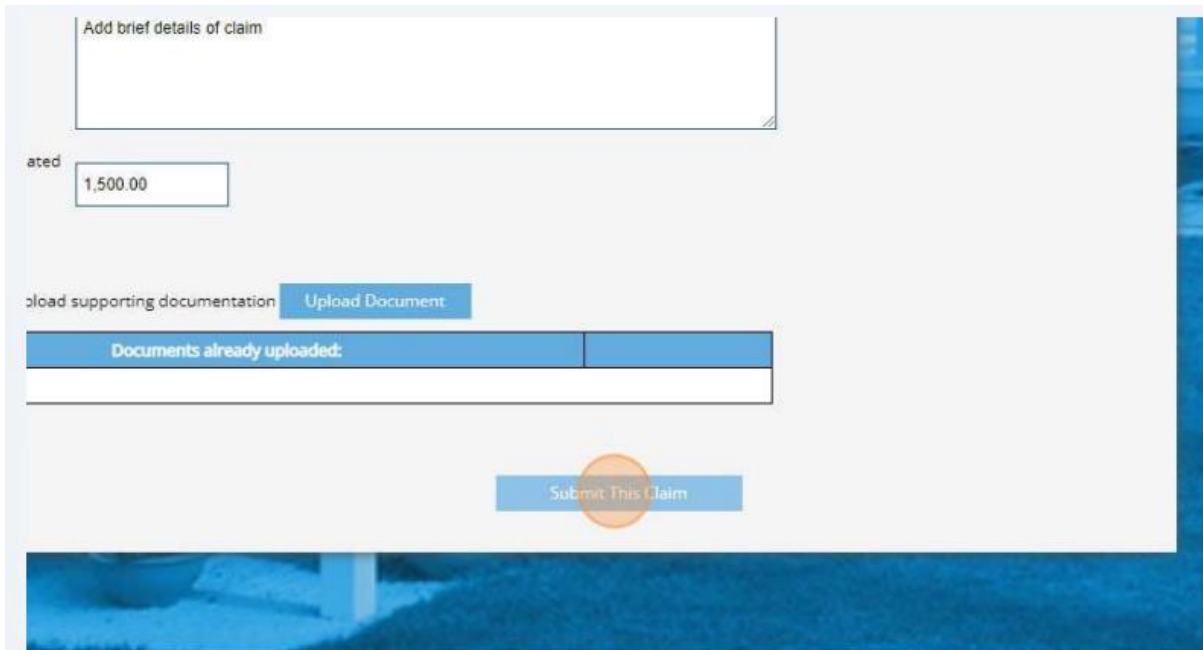
Document Upload

File Name:

Drag File or Click

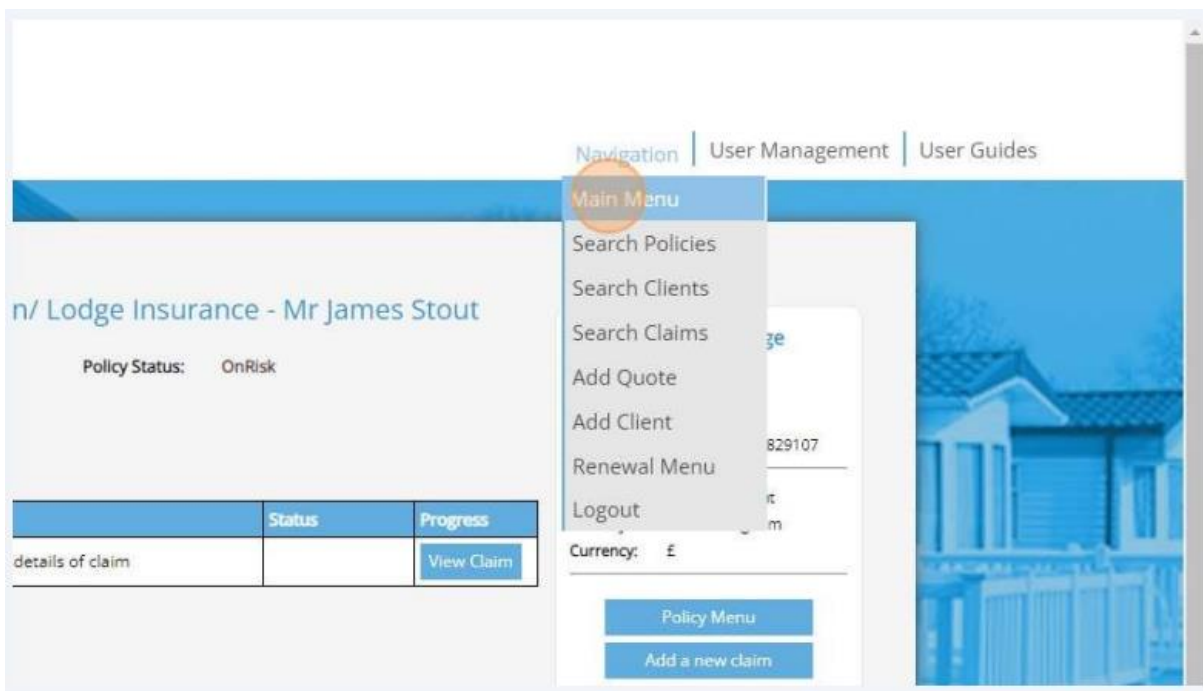
**Close**

Lastly, click to submit:



A screenshot of a web form for submitting a claim. At the top, there is a large text area labeled "Add brief details of claim". Below it, a field labeled "Amount" contains the value "1,500.00". There is a section for "Upload supporting documentation" with an "Upload Document" button and a table for "Documents already uploaded:". At the bottom center, a blue button labeled "Submit This Claim" is highlighted with a red circle.

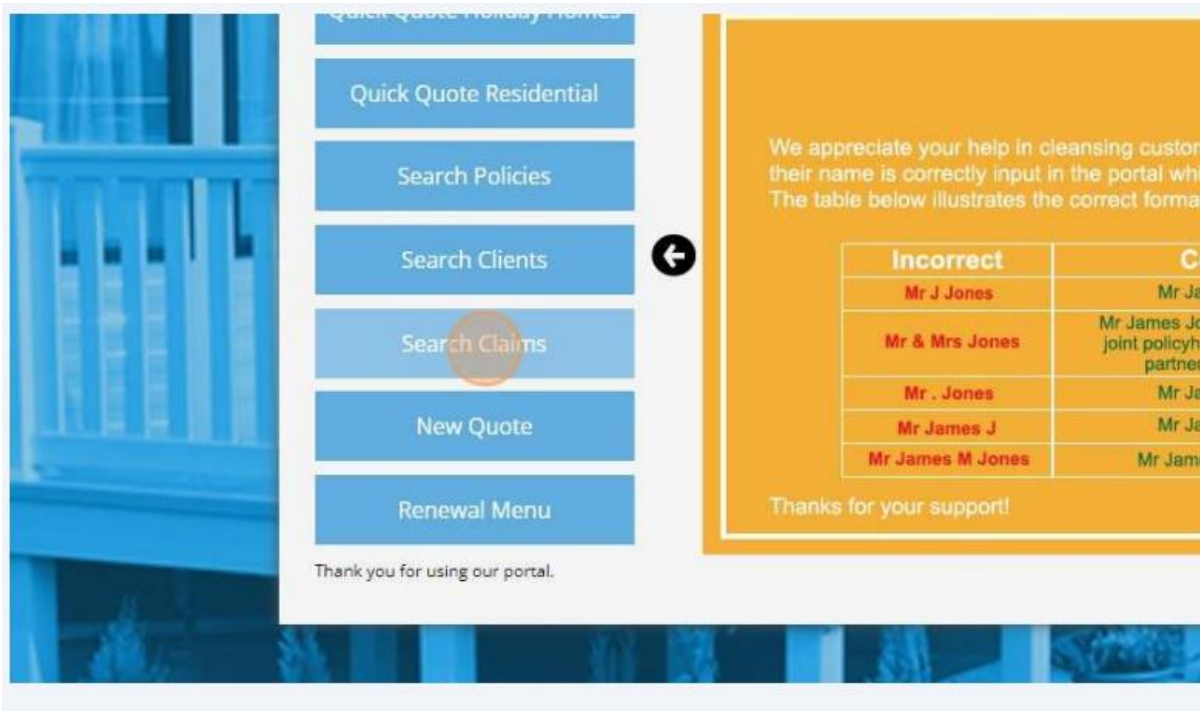
To view the claim you've now added, you can return to the Main Menu:



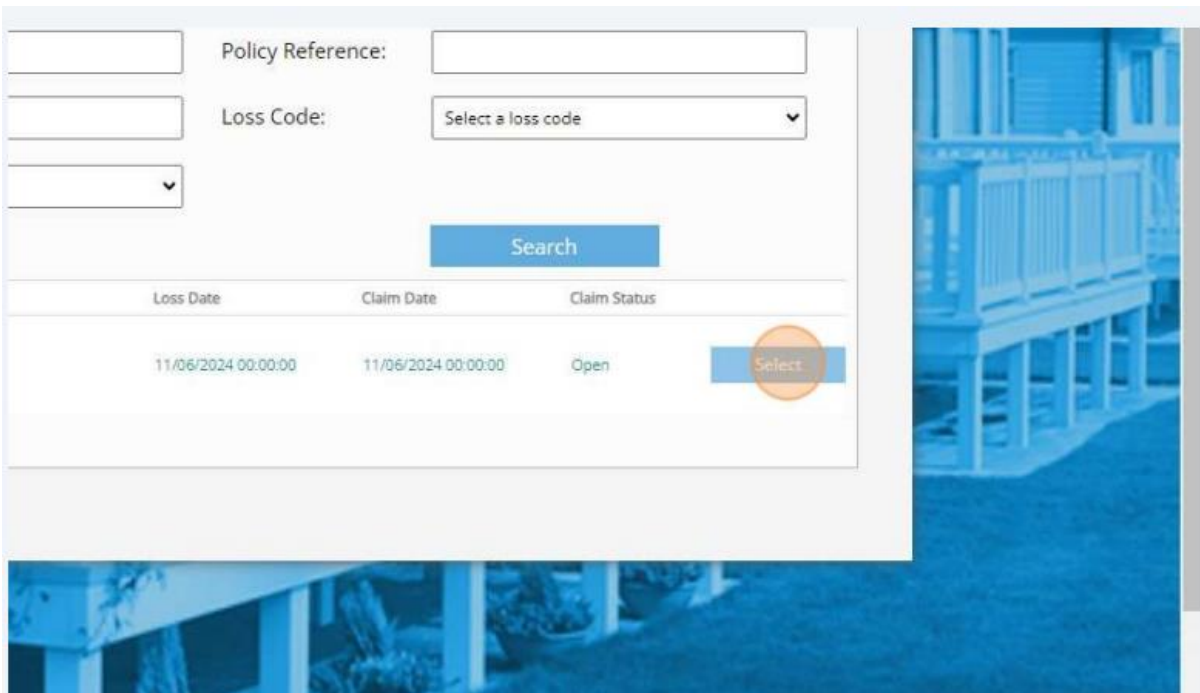
A screenshot of a user interface for a management system. The top navigation bar includes "Navigation", "User Management", and "User Guides". A dropdown menu is open, with "Main Menu" highlighted by a red circle. The menu items are: Search Policies, Search Clients, Search Claims, Add Quote, Add Client, Renewal Menu, and Logout. Below the menu, there are buttons for "Policy Menu" and "Add a new claim". On the left, a card displays "Lodge Insurance - Mr James Stout" with a "Policy Status: OnRisk" and a table with a "View Claim" button.

	Status	Progress
details of claim		<a href="#">View Claim</a>

You'll then need to go into 'Search Claims':



Enter your search criteria, hit search, select the claim:



Then select 'View Claim':

**Holiday Caravan/ Lodge Insurance - Mr James Stout**

63829107      **Policy Status:** OnRisk  
Mr James Stout

CreatedDate	Details	Status	Progress
2024	Add brief details of claim		<a href="#">View Claim</a>

**Holiday Caravan/ Lodge Insurance**  
Policy No: 63829107  
Client ID: CC01120097  
Cert No: CMPCHH2463829107

Proposer: Mr James Stout  
Country: United Kingdom  
Currency: £

[Policy Menu](#)  
[Add a new claim](#)

Important note: While we strive to update the status of claims on a regular basis, for any updates we would always recommend that the customer (or you, if you've been given permission by the customer) call the claims team. For anything other than notifying a claim, standard business hours are operated.

## Regional Account Manager Areas



**Gareth Thomas**  
**North Wales, Scotland, North West & Northern Ireland**  
t: 07468 708161  
e: gareth.thomas@compass.co.uk

---



**Stuart Lindsay**  
**North East & East England**  
t: 07824 561353  
e: stuart.lindsay@compass.co.uk

---



**Paul Willcox**  
**South & Mid Wales, West England & West Midlands**  
t: 07795 542757  
e: paul.willcox@compass.co.uk

---



**Matthew Cox**  
**London, South East, East Anglia & East Midlands**  
t: 07591 341135  
e: matthew.cox@compass.co.uk

---



**Andy Moore**  
**South & South West**  
t: 07767 342821  
e: andy.moore@compass.co.uk

---