

Policyholder Services Member Guide

Update Contact Information

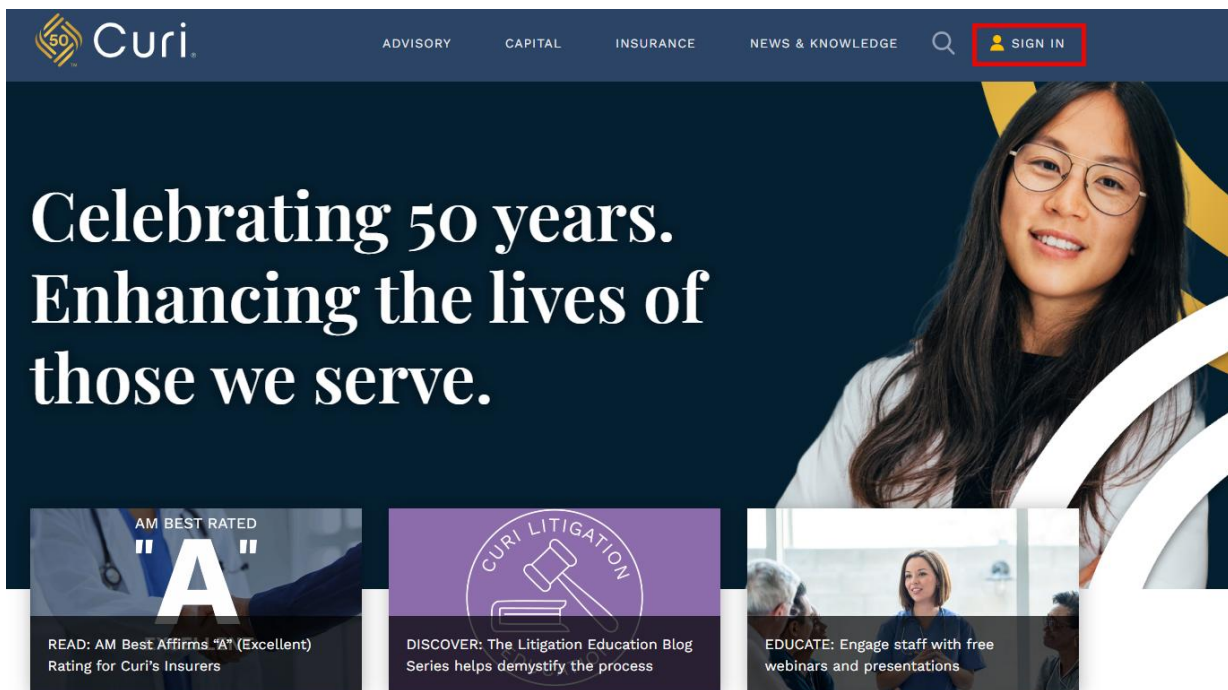
Policyholder Services (PHS) allows providers and authorized practice representatives to manage many aspects of their accounts online, including applications, certificates of insurance, and Legacy Fund balances.

For questions, contact your Curi representative.

Getting Started

Visit curi.com

Click [Sign In](#).



The screenshot shows the Curi website homepage. At the top left is the Curi logo with a '50' anniversary badge. The navigation menu includes 'ADVISORY', 'CAPITAL', 'INSURANCE', and 'NEWS & KNOWLEDGE'. A search icon and a 'SIGN IN' button (highlighted with a red box) are on the right. The main banner features a woman with glasses and the text: 'Celebrating 50 years. Enhancing the lives of those we serve.' Below the banner are three featured content blocks: 1. 'AM BEST RATED "A"' with a sub-headline 'READ: AM Best Affirms "A" (Excellent) Rating for Curi's Insurers'. 2. 'CURI LITIGATION' with a sub-headline 'DISCOVER: The Litigation Education Blog Series helps demystify the process'. 3. 'EDUCATE: Engage staff with free webinars and presentations'.

Once logged in, you will be directed to the [All Curi Resources](#) page. Click on the Policyholder Services chicklet under the Policy Management section to access your account information. Please note this is where you can access risk resources, report a claim, find CME webinars, and other member benefits.



Your membership with Curi means you have access to key tools and resources that we provide. Click any of the following items to access the most important resources for you and your practice.

POLICY MANAGEMENT

Policyholder Services (PHS)

Manage policy information, access policy documents, generate COIs, view invoices, and more.

MyAccount

Manage policy information, access policy documents, generate COIs, view invoices, and more.

Pay Insurance Premium

Curi provides an online payment portal that can be used for one time or recurring payments.

Underwriting Applications and

Home/Policy Screen

Select the **Policy** link to access your account information, where you may do the following:

- Add/delete providers
- Add locum tenens
- Generate COIs
- Change address/contact information
- Change/update email address
- Reset providers' passwords
- View policy details
- Access insured providers tab
- Access billing tab
- Access activity tab
- Manage users

← Back

PHS Policyholder Services

Sign Out

Test Environment

Welcome to PHS

Access policy information, add a provider, find resources, see balances, and more. Everything you need to keep your practice running smoothly is right here for you.

Click the policy link in the left navigation to view your policy.

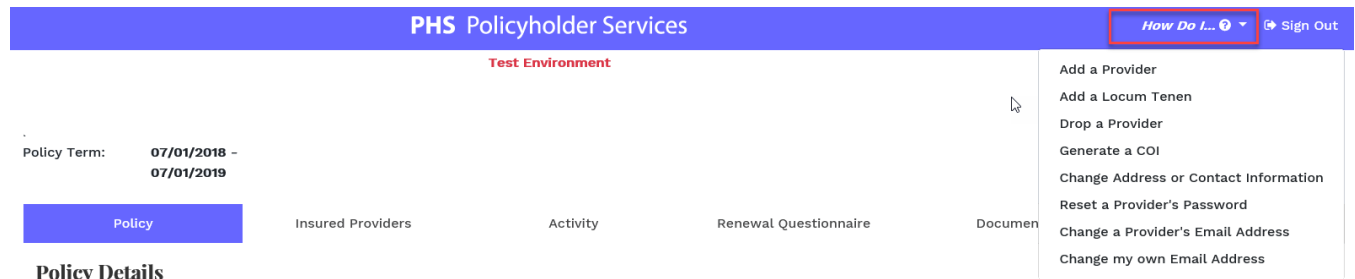
50THX

50 Forward. One THX. Learn more about how we're celebrating you and sharing our appreciation. →

Select the 'Policy' link to access your account information

How Do I...

The “**How Do I...**” drop-down button provides instructions on what you can process through PHS. For example: add a provider, drop a provider, or generate a COI.



Click on an item to view brief instructions. Click on the link within the summary for more detailed instructions, if applicable.

Change Address or Contact Information

For the Policyholder:

Go to the **Policy** tab.

Select **Edit** next to the address you wish to change.

For a Provider:

Go to the **Insured Providers** tab.

Click on the provider's name.

Select **View/Edit Provider Info** from the pop-up menu.

View Provider



This address is used for correspondence with the individual member, and is NOT used for Policy Administration purposes such as Renewal, Billing and Endorsements.

Address Type: Home
 Office

Address Line 1:

Address Line 2:

Address Line 3:

City:

State:

Zipcode:

Office:

Mobile:

Home:

The request will be submitted to underwriting for processing, and the following message will display:

Request to update address received.

Change Provider Email or Password

Click on the **Insured Providers** tab.

Click on the provider that you want to change.

Select **Send/Edit Account Information**.

If sending to a new email address, enter the address and click **Submit**.

Account Options

Reset Password

Click the button below to reset the user's password and email it to them.

Reset Password

Change User ID

This will send a notification email to the new address.

Email:

Change User ID

Cancel