

# Policyholder Services Member Guide

## View Policy Information

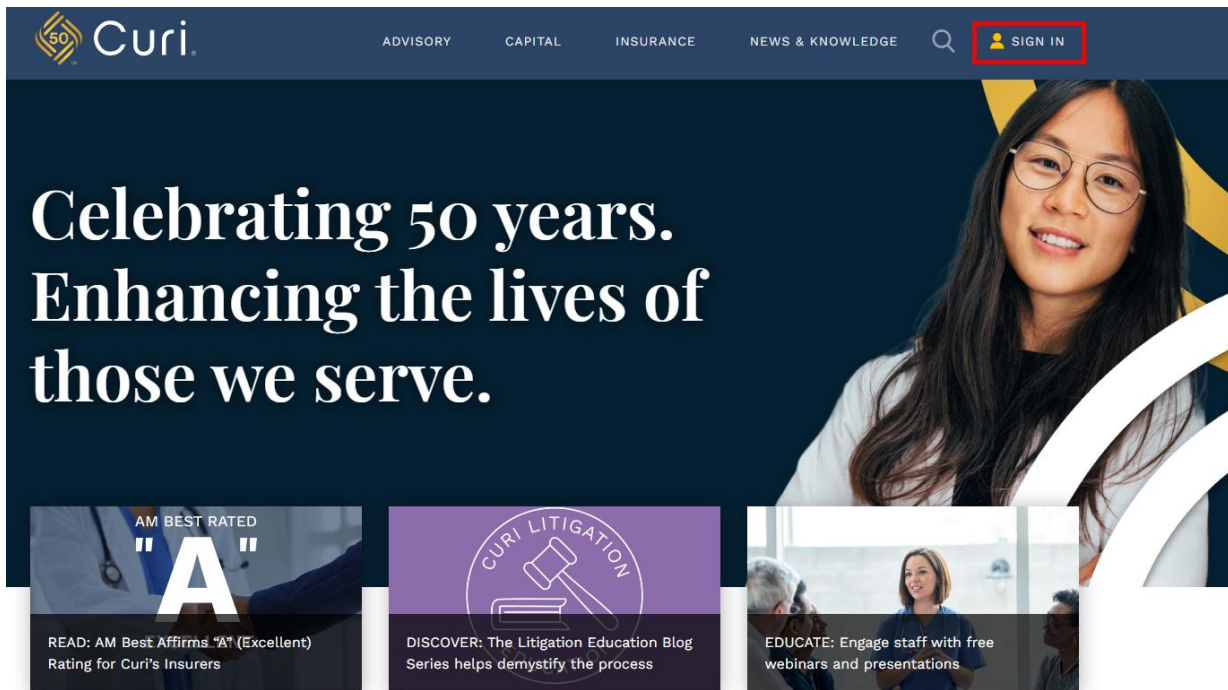
Policyholder Services (PHS) allows providers and authorized practice representatives to manage many aspects of their accounts online, including applications, certificates of insurance, and Legacy Fund balances.

**For questions, contact your Curi representative.**

## Getting Started

Visit [curi.com](https://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', 'NEWS & KNOWLEDGE', and a 'SIGN IN' button highlighted with a red box. 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 articles: 1. 'AM BEST RATED "A"' with subtext 'READ: AM Best Affirms "A" (Excellent) Rating for Curi's Insurers'. 2. 'CURI LITIGATION' with a gavel icon and subtext 'DISCOVER: The Litigation Education Blog Series helps demystify the process'. 3. 'EDUCATE: Engage staff with free webinars and presentations' with a photo of a woman speaking.

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

**Curi**  
practice@curi.com ▾  
Home  
Policy

## 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

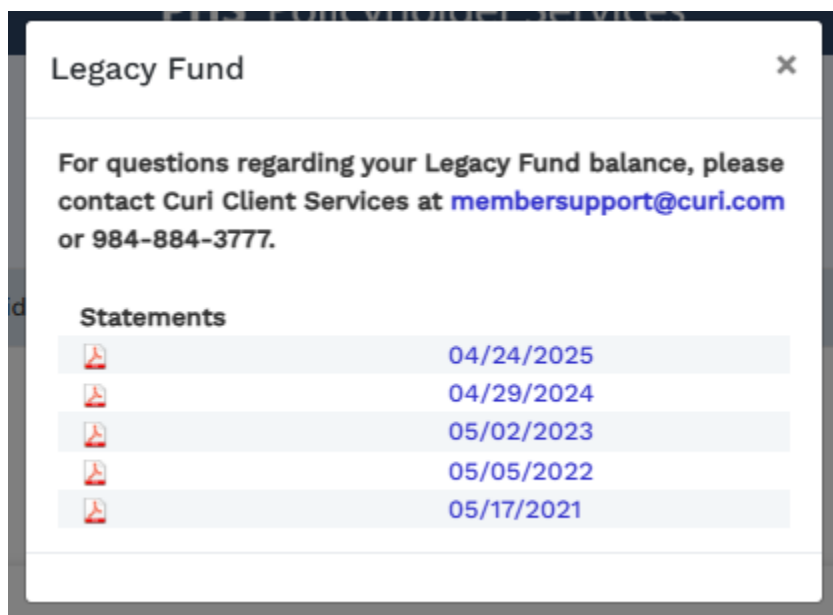
# The Legacy Fund Statements

To view your most recent Legacy Fund Statements, go to the **Policy** tab.

Toward the bottom of the page, you will see a box titled **“The Legacy Fund.”**



Click on that box to view a list of all available statements.



To download a copy of a specific statement, click on the corresponding date of the statement you'd like to view, and a copy of the document will be downloaded to your desktop.