Curi INSURANCE

Policy Portal Comparison

We're streamlining policy management by consolidating our portal systems into one experience: the Curi Policy Management Portal (MyAccount). To help you understand the portal differences and functionality roadmap for MyAccount, we've created the following comparison and status chart:

AVAILABLE TODAY IN MYACCOUNT

FUNCTIONALITY	PHS	MYACCOUNT
Access To Policy Documents and Endorsements	Available	Available
View Transaction Activity and Payment Details	Available	Available
View Account Balance and Download Invoices	Available	Available
Download Certificate of Insurance (COI)	Available	Available
Request To Add or Remove Insured Providers	Available	Available
Designated Billing Role for Users Who Manage Billing and Payments	Not Available	Available
Claims Reporting Within the Portal	Not Available	Available
Portal Login Self-Registration for Brokers	Not Available	Available
Streamlined Access to Make Payments, Set Up Automatic Payments, and Enroll in Paperless Billing	Not Available	Available

COMING SOON TO MYACCOUNT

Functionality	PHS	MYACCOUNT
Update Billing and Mailing Address Information	Available	Q4 2026
Auto-Pay Status Indicator	Available	Q4 2026
Download TLF Statements	Available	Q4 2026
Automated Policy Document Notifications	Not Available	Q4 2026
Broker Dashboard View	Not Available	Q4 2026
Enhanced Add or Remove Provider Functionality	Available	Q1 2027
View the Status of Policy Changes	Not Available	Q1 2027
Loss-Runs/Credentialling Report Download	Not Available	Q1 2027

FUTURE MYACCOUNT PHASE

Functionality	PHS	MYACCOUNT
Broker Activity Feeds and Transaction History	Available	Future Phase
Agency Approval/Review Workflows for Endorsements	Available	Future Phase
Renewal Questionnaires and New Business Quote Workflows	Available	Future Phase

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