Agency Servicing Portal

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What is the Agency Servicing Portal?

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Agents may now access customer policies through the Agency Servicing Portal.

Agents can do the following on the Agency Servicing Portal:

- View and access policy documents
- View and access previous-term policy documents
- View and access renewal documents, renewal documents are loaded 28 days prior to renewal
- Add/remove/update lienholder information
- View billing
- Update mailing or garaging address
- Add drivers/permitted drivers
- Add/remove/change vehicles
- Add/remove/change coverage
- Replace a vehicle
- Add a vehicle and driver in one quote
- Make payments
- Reschedule payments
- Update payment information
- View canceled policies

Agents on the Agency Servicing Portal can do everything EXCEPT:

- Schedule Payments
- Remove Drivers--To remove a driver you will most likely have to exclude them with a Customer Care agent and have the policy holder e-sign the document and return it first. You could potentially be allowed to remove if you are able to provide proof of insurance elsewhere but only if Underwriting approves it
- Add more than one vehicle at a time
- File a Claim
- Cancel a Policy--You can only cancel a policy by calling in to our customer care department or chatting with a customer care agent
- Sign or access signed waivers
- Update NI or driver's names
- Update name, phone number and email address

If your customer has a foreign license or any other situation causing MVR not to run, you nor the customer will have the ability to make changes on the portal. Contact us by chat or phone to update the license. You will get the following error:

-oft	Get ID Cards	Manage Payments	File a Claim	
here				
Policy	Documents		laims	Personal Info
it looks like your	r account can't be modified righ	it now.		
We need to discuss something s	pecific with you about your policy. Please ch	hat with us online about your policy or	call us at 1-877-218-7865.	Chat Now

How to Register Your Agent Account

How to Register your Agent Account

- You will need your Company Code. If you do not have one then email agencytechsupport@elephant.com. Your Company Code is ONLY used to register for the Agency Servicing Portal.
- 2. Go here, and click on "Activate Agent Account" which takes you here
- 3. Complete all fields and click "Continue"

	Welcome to Elephant Please provide the following information to register.
Your company code	Company Code
Your email address	Agent ID
Agent last name	Last Name
Password you want to use to login	Password
,	Confirm Password
	Password must be at least 8 characters and include one lowercase letter, uppercase letter and digit.
	Continue

Login

Login

Once you have registered your account, you can login to your Agent Portal using **this link**. From there you will enter the login information that you set up when registering your account.

elephant						
Please sig	n in					
Email Address						
Password		Ø				
Sign in		Forgot password?	Looking for som	ething el	se? Continue Quote	٩I
	New to the herd?		Agent Resources			
	Activate agent account 🔍					
ielephant elephant					Chat	

COMING SOON!! We will be rolling out Multi-Factor Authentication (MFA) over the next several months, so stay tuned!



Soon, we will be implementing Multi-Factor Authentication (MFA) for our Elephant Agency Servicing Portal. MFA is an additional layer of security designed to safeguard both agent and customer data, ensuring unparalleled protection for your valuable information.



With MFA, you will experience an added security step during the login process. Periodically, when accessing your account, you'll be prompted to enter a unique code sent to you via email. This simple step will act as an extra security measure, making it even more challenging for unauthorized individuals to gain access to your account.



At Elephant, your privacy and data security are our top priorities. By implementing MFA, we are reinforcing our commitment to keeping your information safe and protected from potential threats.

Locked out?

Locked out?

If you are not able to log into the Agency Servicing Portal, start by resetting your password. If you are a Liberty Mutual agent, when it asks for your email, enter your N#. If you receive the email and do the reset and still get an error message, email agency support at agencytechsupport@elephant.com and say you are not able to log in to the portal. We will respond within 1 business day. We will reset your portal and then you will be able to re-register for the Agency Servicing Portal <u>here</u>.

*Reminder as a Liberty Mutual agent you will always use your N# for all fields instead of email.

How to Make Policy Changes

How to Make Policy Changes

For coverage changes:

- 1. Once on the Portal, you will land on the "Policy" tab.
- 2. An edit button appears after each section so you can edit the details.
 - Edit Coverages, Add Driver, Add/Replace Vehicle.
- 3. go through the quote editing desired policy details.
- 4. Click on "View Quote"
- 5. Now you'll see all of your remaining payments for this policy term, policy coverages, vehicle coverages, driver assignments--all of which you can still edit.
- 6. Once you review everything you can click on "Change Policy" or "Discard" If your session times out or you leave without clicking either, the next time you log in you will be able to continue with the change.

See below for screenshots of all the screens.

If you make a policy change close to policy renewal, you will not be able to see the future payments for the renewal. You would need to call into customer care or chat with a customer care agent.

1.-3.

Effective Until					Se	ep 04, 2025	
							J
			Edit Coverages				
Drivers							
							`
Lir	nda Nguyen					>	
	licynolder						
Lo	ng Van Nguven		 	 			
Sp (Ra	ouse ted driver)					>	
							J
Th	anh Sang Nguyen her Relative					>	
(Ra	ted driver)						
			Add Driver				
Vehicles							
Vehicles				 			
Vehicles	Pava	ments	 Documents	 Claim	s		Personal Inf
Vehicles	Payr	ments	Documents	 Claim	s		Personal Inf
Vehicles	Payr	ments	 Documents	Claim	s		Personal Inf
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Vehicles	Pay ges \$50,000/\$	ments	Documents	Claim	S		Personal Inf
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4.

Р	olicy	Payments	Documents	Claims	Personal Info
	Almost Done!				
	Please review your new p	ayments and coverage selections	. Then simply click "Change Policy'	' to confirm.	

New Upcoming Payments

Your next payment on Oct 17, 2023	\$21.23
Nov 17, 2023	\$21.23
Dec 17, 2023	\$21.23
Jan 17, 2024	\$21.22

5.

×	Discard	▲ 104, 2023.	Change Policy	
L				

Payments

Payments

You can now make payments and change payment methods on the Agency Servicing Portal for your clients! You no longer need to call in or chat to get payments done for your clients.

You can now make payments, update the payment method and reschedule payments. For rescheduling payments, it will only show if you are eligible to change the payment. Renewal payments are never allowed to be rescheduled, instead you will want to stop the renewal payment. This can only be done by calling into our Customer Care department.

Policy Pa	ayments	Documents	Claims	Personal Info
Dourmonto		1		
Fayments				
Next Auto Payment:				
🛗 Oct 05, 2023				Poschodulo
\$954.32				Acocheuuie
C You're on Monthly Auto Pay!			5th of each month	s≕ *9054
One-1	ïme Payment		Payment Methods	

How to download policy documents

Click on "Documents" Select the document you want and click on the arrow button.

roncy	Payments	Documents	Claims	Personal Info
Document C	enter			
Current Docume (Aug 17, 2023 - Feb, 17, 20	ents)224)			
ID Cards Vehicle identification c	ards			>
Roadside Assista Vehicle Roadside Assis	ance Cards stance cards			>
Policy Document	ts			>

Select the specific document you want and click on the delivery preference.

Roadside Assista	ance Cards		
Vehicle Roadside Assi	istance cards		
<i>Q</i> = 1	Emergency Roadside Service - 1-87	7-218-7865	
Vp to \$75	Up to \$75 for jump start Up to \$75 to open a vehicle	Up to \$75 to change inflated spare	
	Fuel Delivery Delivery of 2 gallons of fuel at customer	's expense	
2017	ΤΟΥΟΤΑ		
	DRA CREWMAX SR5		
VIN			
2010	FORD		
		1 🔿	

You can now access prior-term policy documents as well. Just scroll down and click the "View Older Documents"

Policy	Payments	Documents	Claims	Personal Info
Roadside Assis	stance Cards			>
Venicle Roadside A	ssistance cards			
Policy Documo	inte			
Documents related	to your policy			>
Billing Docume	ents			<u> </u>
Documents related	to billing			· · · · · · · · · · · · · · · · · · ·
Other Docume	nts			>
Letter of experience	e, proof of coverage, confirmations			
		Download All Documents		
		View Older Documents		

Policy Letter of experien	Payments ce, proor of coverage, confirmations	Documents	Claims	Personal Inf
		Download All Documents		
		Hide Older Documents		
Previous Tern (Jan 18, 2023 - Jul, 18	n Documents 3, 2023)			
ID Cards Vehicle identificat	ion cards			>
Roadside Ass Vehicle Roadside	Assistance Cards			>

How to update a lienholder

Your browser does not support HTML5 video.

- 1. Log into the customer account
- 2. Search for the account needed
- 3. Make sure the "Policy" tab is selected
- 4. Select a vehicle to update the lienholder
- 5. Click "Edit" to update the lienholder
- 6. Select new lienholder from the dropdown and save

Need help with the Portal?

Need Help with the Portal?

While using the Portal if you have questions or need guidance, there is a help center available at the bottom of the page. There are answers to Frequently Asked Questions as well as how-to instructions for using the Agency Servicing Portal.

Po	olicy	Payments	Documents	Claims	Personal Info
		Need help?			
		Get answers to common questions			
		See our FAQs			



Cancelation Information

Cancelation Information

If a policy has been canceled, there will be a banner saying the account cannot be modified with date details under it. Contact us by chat or phone to get more information on these policies.

