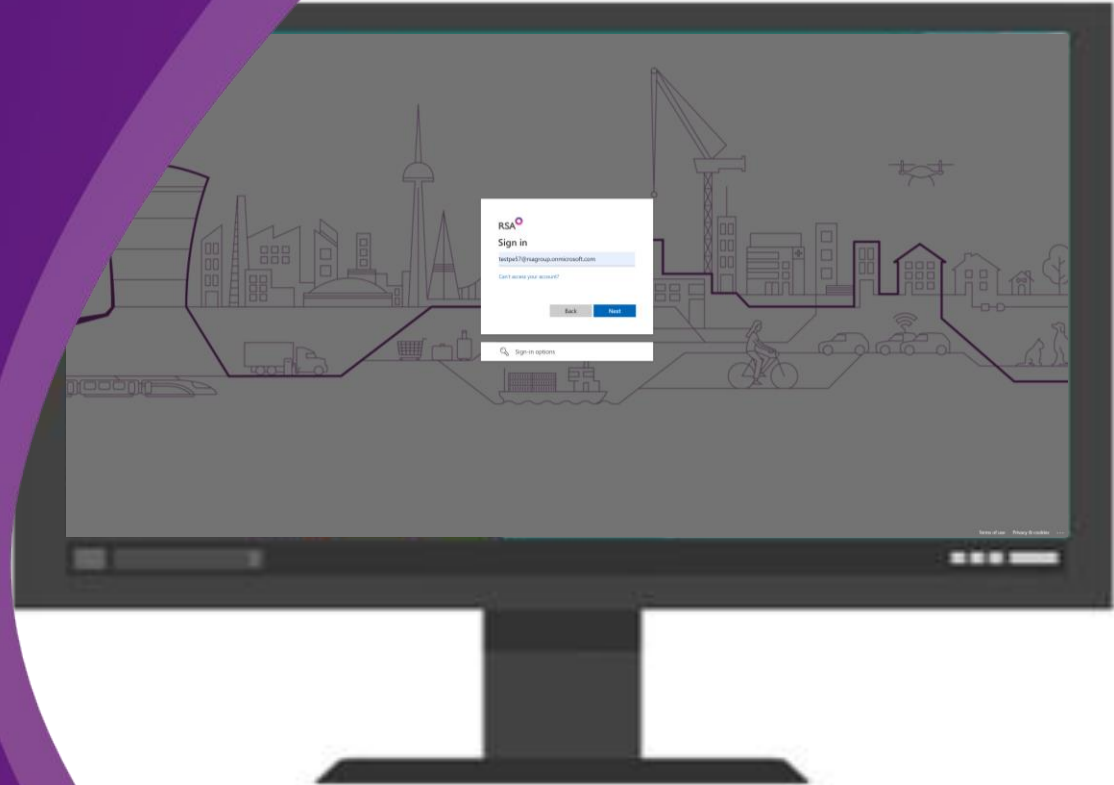


Broker Portal Guide



Logging into your portal

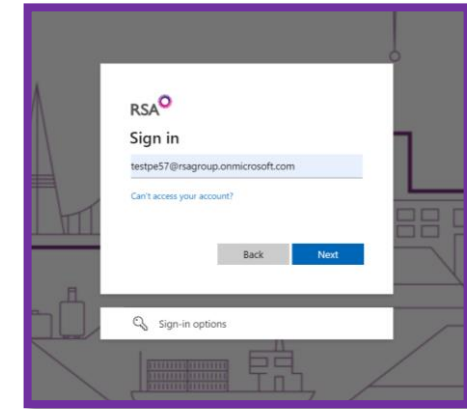
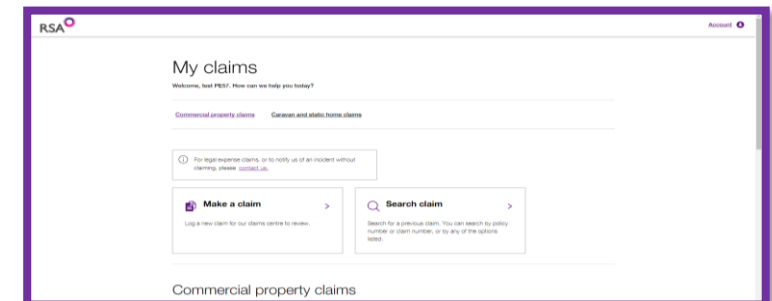
Brokers who currently have access to Claims Online will receive automatic confirmation of their Broker Portal access details, registration is not required, as such you can log in using your existing details (The details used to log into your own company network)

Step 1: If you do not have a Claims Online account, you will need to manually enrol. To do this, navigate to <https://connect-rsab2b.rsagroup.com> and provide your details:

- First name
- Last name
- Agency reference number
- Organisation/Broker company name
- Mobile number
- Email address
- Flat number
- Building or house number
- Street
- City
- Postcode

Step 2: On-screen confirmation that registration request has been submitted

Step 3: You will receive email confirmation of log-in details and can now register new claims and / or check the progress of existing claims in the portal

This is your Dashboard, you can make a new claim or search an existing claim from here.

The screenshot shows the RSA 'My claims' dashboard. At the top left is the RSA logo. At the top right is a link to 'Account' with a user icon. The main heading is 'My claims', followed by a welcome message: 'Welcome, Test NIGVan. How can we help you today?'. Below this is a question 'Which product do you need help with?' and a dropdown menu currently showing 'Commercial motor claims'. A callout points to this dropdown, stating: 'Drop Down menu allows you to select which product you would like to register the claim against, E.G Commercial Motor'. Below the dropdown is an information box with an 'i' icon: 'For legal expense claims, or to notify us of an incident without claiming, please [contact us](#).' At the bottom are two main action buttons: 'Make a claim' with a document icon and 'Search claim' with a magnifying glass icon. A callout points to the 'Make a claim' button, saying: 'Claim "Make a Claim"'. Another callout points to the 'Search claim' button, stating: 'The search feature is only available once you have submitted your first claim, if you need access to the search function and you do not register claims, please contact our Claim Department who can submit a request for access.' Below the buttons is a section header 'Commercial motor claims'.

RSA

Account

My claims

Welcome, Test NIGVan. How can we help you today?

Which product do you need help with?

Commercial motor claims

For legal expense claims, or to notify us of an incident without claiming, please [contact us](#).

Make a claim >

Log a new claim for our claims centre to review.

Search claim >

Search for a previous claim. You can search by policy number or claim number, or by any of the options listed.

Commercial motor claims

Drop Down menu allows you to select which product you would like to register the claim against, E.G Commercial Motor

Claim "Make a Claim"

The search feature is only available once you have submitted your first claim, if you need access to the search function and you do not register claims, please contact our Claim Department who can submit a request for access.

Step 1 – Select Policy

Claim Information

1. Select policy

The information the policyholder is providing to RSA for their claim will be used for the administration of the claim and the purposes set out in our [Privacy Notice](#).

Please take care to answer all questions honestly and with as much detail as possible.

By continuing, the policyholder is agreeing to pledge to answer all the questions about this claim honestly and to the best of their knowledge.

Before you make a claim, check if the policyholder has any other policies which may provide cover for the item being claimed for.

For example, from a bank, retailer or other insurer.

Select policy

To search for a policy let us know when the incident happened and the approximate time.

When did it happen?

07/01/2025

What time?

00:00

What policy type are you searching for?

Commercial motor claims

For any incident involving severe injuries or fatalities please [contact us](#).

Is the policy you're searching for dealt with under a block or a scheme?

Yes

No

Policy number

Insured address postcode

This is the policyholder's risk address postcode.

Search for policy >

< Cancel

Continue >

Is this a block policy?

Insert the policy number

Insert the risk address

Click search to locate the policy.

Click Continue

Insert time if known

Insert the date of incident

Always call us if its urgent reminder

Step 1.a – Select Policy (Scheme)

Search for a policy

To search for a policy let us know when the incident happened and the approximate time.

	Policy type	Policy number	Policyholder's name	Insured address	Insured postcode	Start date	Renewal date
<input checked="" type="radio"/>	Commercial Motor	RTT261301	RONAN ADRIAN PVT LTD	WOODHOUSE FARM, CHARLMONT ROAD	TR170BA	1 September 2023	1 September 2024

[Search again >](#)

If the policy details you have input is for a scheme policy and the information matches this will find a policy for you to attach to your claim

Where a policy cannot be matched due to the policy type then the policy field here will be blank, you will still be able to proceed with claim.

Step 1.b – Select Policy (Block)

Search for a policy

To search for a policy let us know when the incident happened and the approximate time.

We can't find the policy you're searching for. You may need to verify the policyholder's details before progressing with their claim.

Search again >

2. Insert vehicle reg

Vehicle details

Registration number

Find vehicle >

[Enter their vehicle details manually.](#)

Vehicle details



CA15TUH

MERCEDES-BENZ and VITO 113 CDI

[Not their vehicle? Add it manually instead.](#)

2a. If the details are correct this should find the vehicle using the integrated vehicle lookup

1. Block Policies rely on manual data input for a claim to be set up, you will need to build the claim from scratch, starting with the customer's contact information

Is the policyholder part of a company or are they an individual?

Company

Individual

Company name

Scheme name

Phone number

+44

Email address

What is their address?

Enter postcode

Enter address manually

3. Insert Policyholder details here

Is the policyholder reporting this for information only? [Hide help](#)

Information only means the policyholder is informing us of an incident but not making a claim. For example, there might not be any damage to their vehicle but they're still reporting it to us.

Yes

No

Commercial motor emergencies

For any incident involving severe injuries or fatalities please [contact us.](#)

Are they stranded at the roadside right now?

Yes

No

Has the insured vehicle had any mechanical failures? [Hide help](#)

A mechanical failure means one or more parts stopped working. For example, the brakes, engine, or steering system.

Yes

No

4. Complete accordingly.

Step 2 – Type of Incident

Claim Information

1. Select policy
2. Type of incident
3. Location
4. Incident details
5. Damage assessment
6. Additional Information
7. Contact Details
8. Claim summary

Type of incident

Please be as accurate as possible. Knowingly providing answers that do not accurately represent your claim may be classified as insurance fraud and is illegal. Avoid this by answering honestly and to the best of your knowledge.

What's the main reason for the policyholder's claim?

Collision with 1 other vehicle

What caused the collision?

Policyholder hit the other vehicle on a roundabout

We may need to contact the driver of the policyholder's vehicle for further information in the event that the claim is disputed.

Tell us what happened
We'll ask you more about the incident and any damage in a moment. This is a chance to describe the circumstances in your own words.

Changing Lanes

14/250

What's the main reason for the policyholder's claim?

Collision with 1 other vehicle

Collision when parked or parking

Theft or vandalism

Incident with their vehicle only

Incident with a bike or pedestrian

Collision with 1 other vehicle

What caused the collision?

Policyholder hit the other vehicle on a roundabout

Policyholder hit the other vehicle on a roundabout

Both vehicles collided head-on

Both vehicles collided on a narrow lane

Both vehicles reversed into each other

Policyholder exited a side road and hit the other vehicle

Loss Cause - Examples

Sub Loss Cause - Examples

3. Describe what has happened (250-character limit)

1. Select Cause of Loss

2. Select Sub loss Cause

Step 3 – Location

Claim Information

- 1. Select policy
- 2. Type of incident
- 3. Location**
- 4. Incident details
- 5. Damage assessment
- 6. Additional Information
- 7. Contact Details
- 8. Claim summary

Tell us what happened

Please be as accurate as possible. Knowingly providing answers that do not accurately represent the customer's claim may be classified as insurance fraud and is illegal. Avoid this by answering honestly and to the best of your knowledge.

Where did the incident occur?

Postcode

1. Select Incident Location

The information seen here may change, if so your options will be:

- Location on a map
- Enter a postcode
- Enter a full address manually

Step 4 – Incident Details


Claim Information
1. Select policy
2. Type of incident
3. Location
4. Incident details
5. Damage assessment
6. Additional Information
7. Contact Details
8. Claim summary

Incident details

Tell us more about the people, vehicles and other property involved.

Policy vehicle and driver

Vehicle involved



MERCEDES-BENZ , VITO 113 CDI

What was the vehicle being used for at the time of the incident?
(Optional) [Show help](#)

Please Select ▼

What was the estimated speed of the vehicle at the time of the incident?
(Optional)
Please use miles per hour (mph).

Who owns the vehicle? (Optional)

Please select ▼

Licence details

Has the driver held a full UK or EU licence for at least 12 months?
(Optional)

Motor convictions

Has the driver had any motoring convictions, pending prosecutions or fixed penalty points in the past 5 years?
A pending prosecution means the person has been charged by police but they've not yet gone to court.

Passengers

Were there any passengers in your vehicle?

Injuries

This section is optional, but your answers may help us understand the severity of the incident.

Did the ambulance service attend the scene? (Optional)

Was anyone in your vehicle injured? (Optional)

Vehicle recovery

Was the vehicle recovered or towed following the incident?

Vehicle damage

Was your vehicle damaged in the incident?

Did the airbags inflate during the incident? (Optional)

The information seen here may change, depending on the answers provided. The question sets are dynamic and will lead on from depending on the previous answer given.

Step 4 – Incident details – Examples

1. Vehicle Damage Example, Complete accordingly.

Vehicle damage

Was your vehicle damaged in the incident?

☒ Yes

☐ No

☐ Not sure

Which areas of the vehicle were damaged? (Optional)
Select all that apply.

☐ Front

☐ Rear

☐ Driver side

☐ Passenger side

☐ Roof

☐ Wheels

☐ Interior

☐ Other

2. If any personal effects were damaged, you can add them here.

Personal items

Were any personal items lost or damaged in the incident?
Please include child seats, even if they appear undamaged.

☒ Yes ☐ No

What are the items? (Optional)
List each affected item and include details like the make and model, if available.

0/255

What happened to the items? (Optional)
Describe any damage or say if they were lost or destroyed.

0/1333

How much are all the items worth in total? (Optional)
Give an estimated cost to replace all the items in Great British Pounds.

£

3. If there is a Property Damage, you can add them here.

Property or items 1

Property type

Tell us about the damage

0/1333

Address details

Postcode

[Find address >](#)

[Enter address manually](#)

Who owns the property or items involved in the incident? (Optional)

☐ Individual ☐ Company

[Remove property or item](#)

[Add another property or item](#)

4. If there is a third-party involved, you can add them here.

Third-party vehicles

Tell us about any third-party vehicles involved in the incident. This includes cars, vans, lorries and motorcycles.

Third party vehicle 1

Registration number (optional)
Only have part of the registration? Add it to Other notes, after Driver details.

[Find vehicle >](#)

[Enter vehicle details manually](#)

Driver Details

Do you have the driver's name or contact details?

☐ Yes ☐ No

Other notes (optional)
Let us know any other important information about the driver or their vehicle, like a partial registration number.

0/250

It is recommended that on any additional pages you complete all questions to the best of your knowledge & input as much detail as possible.

Step 5 – Damage Assessment

1. RSA Repair Network will allow an RSA Approved Repairer to make the necessary arrangements with the customer directly.

Repairer options

We can find a suitable repairer within the RSA repair network. Or you can choose your own repairer.

Choose a repairer option

RSA repair network

Own repairer

Other



RSA repair network benefits

- Temporary replacement vehicle – subject to availability
- Vehicle collection and delivery included

Service location

Let us know where the vehicle is kept and we'll search for a nearby repairer. For the search to work correctly, please choose or add an address with a complete postcode.

Where is the vehicle?

Please Select ▼

Damage assessment and repairs

We'll work with a vehicle repairer to assess the vehicle damage and estimate the cost of potential repairs.

Repairer options

2. Selecting to use an own repairer will prompt you to complete a few additional fields, such as their name.

RSA repair network

Own repairer

Other



Things to consider

Choosing a provider outside of our repair network means:

- we cannot request a temporary replacement vehicle
- vehicle collection and delivery may not be provided

The chosen repairer will need to send a detailed estimate and photos of the damage to nrg.inspections@uk.rsagroup.com or via Audatex using code RSANGS. Please share this information with them.

3. If you don't choose to use a supplier at this stage, use Other to provide a reason why.

Choose a repairer option

RSA repair network

Own repairer

Other

Tell us why you've selected this option [Show help](#)

0/250

It is recommended that on any additional pages you complete all questions to the best of your knowledge & input as much detail as possible.

Step 6 – Additional Information

Claim Information

1. Select policy
2. Type of incident
3. Location
4. Incident details
5. Damage assessment
- 6. Additional Information**
7. Contact Details
8. Claim summary

Additional information

Please be as accurate as possible. Knowingly providing answers that do not accurately represent the policyholder's claim may be classified as insurance fraud and is illegal.
Avoid this by answering honestly and to the best of your knowledge.

Policy details

Who is the owner and registered keeper of the vehicle involved in the incident? (Optional)

Please Select ▼

Witness details

A witness is someone who saw what happened and has agreed to give a statement. You don't need to add witnesses, but they may be able to support the policyholder's claim.

If you add a witness, you will need to let them know you've passed their information to RSA and they may be contacted by us.

i You will need to provide us with at least one contact option for each witness. This can be a phone number, email, address details or a combination of each.

Select a witness (optional)

Please Select ▼

Witness details

A witness is someone who saw what happened and has agreed to give a statement. You don't need to add witnesses, but they may be able to support the policyholder's claim.

If you add a witness, you will need to let them know you've passed their information to RSA and they may be contacted by us.

i You will need to provide us with at least one contact option for each witness. This can be a phone number, email, address details or a combination of each.

Select a witness (optional)

Please Select ▼

Police details

If the incident was reported to the police, please provide any details such as the name of the police force and incident reference number.

Was the incident reported to the police? (Optional)

Yes

No

Photos, files and video footage


Upload any photos, files, or video footage of the incident which may support the claim.

If you don't have these now, they can be uploaded later.

If you have more than one document to add, they will need to be uploaded separately.

Add photos and files

Select Upload photos and files, then select the photo or file you want to add. Or, drag and drop the photo or file to attach it. If you need help with this, please [contact us](#).



Drag and drop to attach
or

[Upload photos and files >](#)

Add video footage

Please select the preferred contact. If we don't have an email address for them, you can add one now

A VUEcloud link will be sent to them to upload any video footage. The link will be valid for 6 hours in most cases, however, once this has expired, you may request a new one.

Preferred contact

Please select ▼

i Please note: If you have more than 1 document to add, they will need to be uploaded separately.

Photos can be added by either dragging and dropping or uploading from your desired location

Videos can only be uploaded via VUEcloud, select from the dropdown who has the footage, and this will generate a link to the recipient.

****This Additional Information page is dynamic and will change depending on the information you have recorded on the previous screens**

Step 7 – Contact Details

Claim Information

1. Select policy

2. Type of Incident

3. Location

4. Incident details

5. Damage assessment

6. Additional Information

7. Contact Details

8. Claim summary

Contact details

Please confirm who will be the main contact for this claim. This person needs to be available to discuss the claim and make decisions on related matters. We will also contact this person with any updates throughout the claim process.

Any new information you add here will only be used for this claim. To update the details on the policy, please [contact us](#).

Main contact

First name:
Test

Last name:
Fleetsheld

Email:
testPE14@rsagroup.onmicrosoft.com

Phone number:
07401596389

[Change main contact](#)

Broker reference number (optional)

Preferred phone number (optional)

We'll only ever use this if we need to discuss the claim.

Email address (optional)

Contact preferences

While we'll always try to use preferred contact methods, there may be times we need to call or send a letter.

Have speech or hearing difficulties? Get support with phone calls, using [Relay UK](#).

What's the best way to contact this person about the claim?

For example, if we need to ask for more information or discuss something important.

Please Select

Progress updates

We can send notifications about the claim's progress. For example, when the claim's status changes or a payment is made.

Does the main contact want progress updates?

Yes

No

Additional support

Please let us know if there is any need for further assistance or anything we should be aware of.

Does the main contact need any additional support?

Yes

No

Policyholder's VAT status

Is the policyholder VAT registered?

The policyholder is responsible for VAT if they're registered for this.

Yes

No

Not sure

Bank details

If the policyholder's claim is accepted, we may pay a settlement into a current account belonging to them.

If we don't have bank details on file, you will need to add them. Details entered will only be valid for this claim. We'll also run an automatic check to confirm they're correct.

[Add bank details](#)

[Back](#)

[Save and exit](#)

[Continue](#)

Step 8 – Summary and Save & Exit

Claim Information


- Select policy
- Type of Incident
- Location
- Incident details
- Damage assessment
- Additional Information
- Contact Details
- Claim summary**

Claim summary

Please make sure all information you are providing is accurate before submitting the policyholder's claim. To make a change, select the relevant section from the claim information menu.

The policyholder's claim will be managed according to the terms of their policy and any relevant endorsements. Once we've confirmed the policy, we can share more information, including any excess details.

Policy number	FS123456TEST
Vehicle registration number	FP11XBC
Type of Incident	Collision with 1 other vehicle, Policyholder hit the other vehicle changing lanes
Main contact	Test Fleetshield 07401596389
Repairer details	MRN (Motor Repair Network) 03003030252
Incident date	17 September 2024
Incident location	Peterborough, GB
Vehicle damage	Passenger's side: front passenger door



Claim excess


We need to review the claim and policy details before we can confirm the policyholder's excess.

A claims handler will contact you to confirm the exact amount.

Claim Summary will provide a high-level overview of the information you have recorded, you can click back to previous steps if needed to add more information

You can click on "Save & Exit" at anytime during the FNOL process, doing so will provide you with a statement confirming what will happen next.

< Back
 Save and exit
Continue >

Close 

Are you sure?

Your progress will be saved and available for 72 hours for you to pick up where you left off. After that time, you won't be able to return to this draft and will need to start a new claim.

We may store your details to improve our service. Full details of how we use your data can be found in our [privacy policy](#).

If you need help, please try live chat or [contact us](#).

< Cancel
Yes, save and exit >

Claim Submitted

The policyholder's information has been submitted

Their draft claim reference number is 000-00-024039

This will be updated once the details provided have been confirmed.

If this information was submitted before 12 pm during the week, we'll contact the main contact by the end of that day. If it's after 12 pm, we'll be in touch with the main contact the next working day. If this information was submitted on a Saturday or Sunday, we will contact the main contact on the following Monday (excluding bank holidays).

If their claim is urgent, a member of our team will contact the main contact as soon as possible.

It may take a bit longer for us to contact the main contact during busy periods.



[Back to claims homepage](#) >


When a claim is submitted successfully, you will see a claim number which will be in one of two formats.

- 000-00-NNNNNN – This is known as a draft claim number
- 001-01-NNNNNN – This is a fully created Claim Number.

Please do not provide a draft claim number to a customer as this number will change once details have been confirmed, if you have signed up to receive updates from us automatically, you will also receive confirmation of the new claim number.

Live Chat



Account 

My claims

Welcome, Test NIGVan. How can we help you today?

Which product do you need help with?

Commercial motor claims ▼



For legal expense claims, or to notify us of an incident without claiming, please [contact us](#).



Make a claim >

Log a new claim for our claims centre to review.



Search claim >

Search for a previous claim. You can search by policy number or claim number, or by any of the options listed.

You may have noticed this little chat icon on the bottom, this starts the live chat feature with an RSA Handler


Commercial motor claims

Here's a summary of your claims. To review a claim's details or continue a saved draft, select the claim number.


Legal expense claims are not shown online. For more details, please [contact us](#).



Live Chat




For legal expense claims, or to notify us of an incident without claiming, please [contact us](#).



Make a claim


Log a new claim for our claims centre to review.



Search claim

Search for a previous claim. You can search by claim number or claim number, or by any of the listed.

Commercial motor claims


Live Chat

1. Hovering over the little speech bubble will expand the live chat button to enable it to be clicked

Live Chat won't put you through to your designated claim handler, it will connect you to any agent who is available for a live chat.

2. This will open the live chat feature for each field to be completed accordingly

RSA Live chat

Our conversation will be retained by RSA for quality, training, monitoring & security purposes. If you are using a shared device, we recommend you log out and close all pages. In case you'd like any further information on how we use your personal data, here's a link to our Privacy Notice [Privacy policy – RSA Group](#)

Name *

Email *

Phone Number

What type of claim do you want to make or ask us about? *

Select an option

Your claim, quote or policy reference

Your Question *

Start Chat

Powered by eGain

Dashboard

Account

My claims

Welcome, Test NIGVan. How can we help you today?

Which product do you need help with?

Commercial motor claims

For legal expense claims, or to notify us of an incident without claiming, please [contact us](#).

Make a claim

Log a new claim for our claims centre to review.

Search claim

Search for a previous claim. You can search by policy number or claim number, or by any of the options listed.

Commercial motor claims

Commercial motor claims

Here's a summary of your claims. To review a claim's details or continue a saved draft, select the claim number. Legal expense claims are not shown online. For more details, please [contact us](#).

Claims that were closed more than 4 years ago won't show in your account. If you wish to discuss this, please [contact us](#).

The information you are providing to RSA Insurance will be used for the purposes set out in our [Privacy Notice](#).

This is your dashboard, here you will be able to see what claims you have registered, their status as well as instigating a new claim

You can click into any claim hyperlinks to see more information about that claim

Status ▾	Claim number ▾	Policyholder na... ▾	Incident date ▾	Vehicle registra... ▾	Type of incident ▾	Driver name ▾
open	006-01-003856	Dash Holdings Ltd	13 December 2024	CA15TUH	Collision with 1 other vehicle	Lyndon Moon
draft	000-00-005294	Dash Holdings LTD	13 December 2024	CA15TUH	Incident with my vehicle only	Lyndon Moon

Claim Summary- Summary

Viewing an existing claim will place you into the Claim Summary page

Claim summary

Claim number: 006-01-003856

View your claim details, check progress and add new notes and documents.

[Summary](#) [Documents](#) [Notes](#) [Bank details and payments](#) [Services](#)

Need to contact the motor claims team? Please [contact us](#).
You can also use the Notes tab to add new notes.

Summary

Policy number	MTRFT058
Vehicle registration	CA15TUH
Incident date	13 December 2024
Vehicle make, model and year	MERCEDES-BENZ,2015
Claim status	Open New note added 13 December 2024
Policyholder	Dash Holdings Ltd
Type of incident	Collision with 1 other vehicle, The other vehicle hit my vehicle from behind
Reported by	Dash Holdings LTD

Main contact	Dash Holdings 01422123456
Phone number	03301000565
Verification	Policy verified
Checking coverage	We're checking the circumstances of the claim in order to confirm indemnity under the policy. The claims team will be in touch to confirm if any further details are required.
RSA liability assessment	Third Party at Fault
Repair and total loss	Pending

From here, you will be able to view information like its status, claim progress including current claim exposure & reserves.

Financial updates

Please note that the amount paid column may include payments to suppliers.

Cover type	Exposure status	Coverage	Coverage subtype	Total paid
Vehicle	Open	Accidental Damage	Vehicle Damage	£0.00

Claim excess

If the claim is accepted, the following excess amounts will need to be paid. Any changes to the claim may affect the amounts shown.

Excess type	Excess amount	Total applicable excess
		£0.00

Claim Summary– Documents

Claim summary

Claim number: 006-01-003856

View your claim details, check progress and add new notes and documents.

[Summary](#)
[Documents](#)
[Notes](#)
[Bank details and payments](#)
[Services](#)

Upload documents

i Please note: You won't be able to delete any photos, files or video footage that have been uploaded here.

i Please note: If you have more than 1 document to add, they will need to be uploaded separately.

Upload photos, files, or video footage of the incident which may support your claim.

Add video footage

Please select the preferred contact. If we don't have an email address for them, you can add one now

A VUEcloud link will be sent to them to upload any video footage. The link will be valid for 6 hours in most cases, however, once this has expired, you may request a new one.

Preferred contact


Please select

Here, you can upload any documents post FNOL

You can Drag & Drop or Browse for any files you need

Add photos and files

Select Upload photo or file, then select the photo or file you want to add. Or, drag and drop the photo or file to attach it. If you need help with this, please [contact us](#).



Drag and drop to attach
or

Upload photos and files

There are no documents associated with this claim.

Here you can select the recipient to receive the VUEcloud link to upload MP4 Videos.

* Unfortunately, you are unable to drag & drop emails, this update will come in future update *

Claim Summary– Notes

Any Notes added by you or RSA will appear in here, you can also add notes by clicking here

This will populate a pop-up box, select your Note Type, Subject & type your note accordingly

Claim summary

Claim number: 006-01-003856

View your claim details, check progress and add new notes and documents.

[Summary](#)
[Documents](#)
[Notes](#)
[Bank details and payments](#)
[Services](#)

Notes

Ask a question, give us feedback, or tell us about a recent update. If we need to reply, we'll respond within 5 working days. We'll add our notes here too.

Need to speak to someone now? Try live chat or [contact us](#).

[Add new note](#)

Saved notes

To open a note, select the subject link.

Close X

New note

Type of note

Please Select ▼

Subject

For example adding information or asking for an update about the claim.

0/30

Note

Please don't add any personal information such as bank details as part of your note.

< Cancel

Save note >

Claim Summary– Bank Details

Claim summary

Bank information will appear here

[Summary](#) [Documents](#) [Notes](#) [Bank details and payments](#) [Services](#)

Bank details

If your claim is accepted, we may pay a settlement into the nominated bank account. So we can make settlements promptly, please make sure we hold the correct details.

If you add new bank details, they'll only be used for this claim. We'll also run an automatic check to confirm they're correct.

In the event of us making a payment to settle your claim, our preferred payment method is by BACS.

Account type:
Personal

Single or joint account:
Single

Account holder:
Mr Im A Test

Sort code:
xx-xx-xx

Account number:
xxxx2211

[Change bank details](#)

If no BACS details are stored and you did not add them at claim registration stage, you can add them here.

Once you have added BACS details, these can be amended should they change, its worth noting that doing so will override any previous inputs.

Any BACS details added will only stay on this claim, they will not be added to any previous or future claims.

Bank details

If your claim is accepted, we may make settlements promptly, please

If you add new bank details, they'll only be used for this claim. We'll also run an automatic check to confirm they're correct.

In the event of us making a payment to settle your claim, our preferred payment method is by BACS.

Account type

Personal

Business

Is it a single or joint account?

Single

Joint

Name of account holders

The account name must match the details held by the bank.

Mr Im A Test

Sort code

The sort code should be 6 digits long.

01-23-45

Account number

The account number should be 8 digits long. If yours is shorter, add a zero at the start.

44332211

[Confirm bank details](#)

[Remove bank details](#)

Adding manual details will override existing BACS details, these updates will only apply to this claim, it will not affect any previous or future claims.

When Bank Information has been added, Bank Wizard will check and validate the information to ensure this is correct. If the validation fails it will provide you with some context as to what has not passed, Example: Address not matching the name

Claim Summary- Services

Claim summary

Claim number: 001-01-127872

View your claim details, check progress and add new notes and documents.

[Summary](#)

[Documents](#)

[Notes](#)

[Bank details and payments](#)

[Services](#)

Services

Find out more about the services and suppliers involved in your claim.

Any Suppliers appointed post FNOL will appear here, it will display supplier name, contact number & appointment date

Supplier name	Phone number	Service category	Date appointed
Davies	01204329140	Buildings Validation/Quote	18 October 2023

Claim Summary- Settlement Offer

Claim summary

Claim number: 006-01-003859

View your claim details, check progress and add new notes and documents.

Settlement Offers
will be shown here

[Summary](#) [Documents](#) [Notes](#) [Bank details and payments](#) [Services](#) [Settlement value](#)

Proposed settlement value

Review the details of the claim settlement.

You can reply directly to the offer with a response to whether this is Accepted or Rejected, if Rejected you can provide a reason why and can all propose a counteroffer for consideration

Value

Claim settlement

£500

17 Dec 2024

Settlement

Last updated by Handler

Reply >