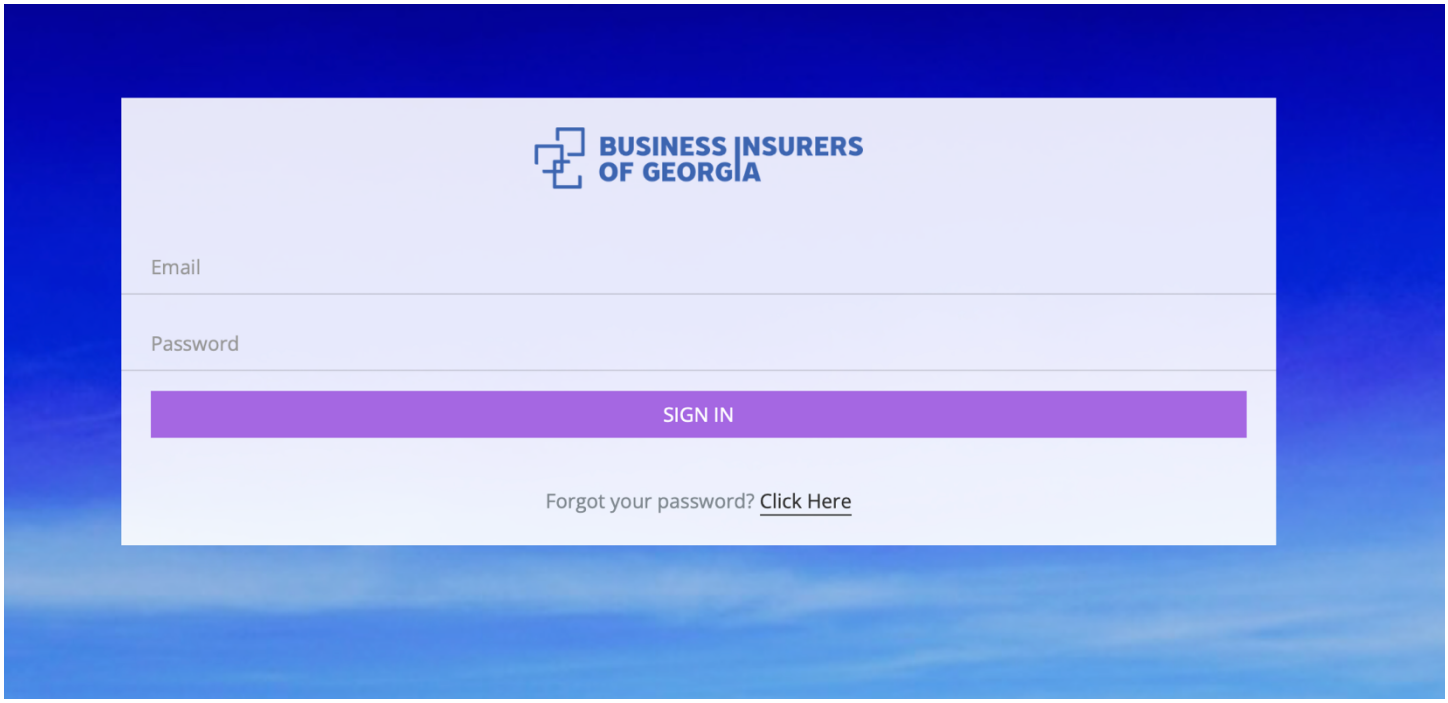
**Submitting a Prospect Notification Through the BIofGA Client Portal**

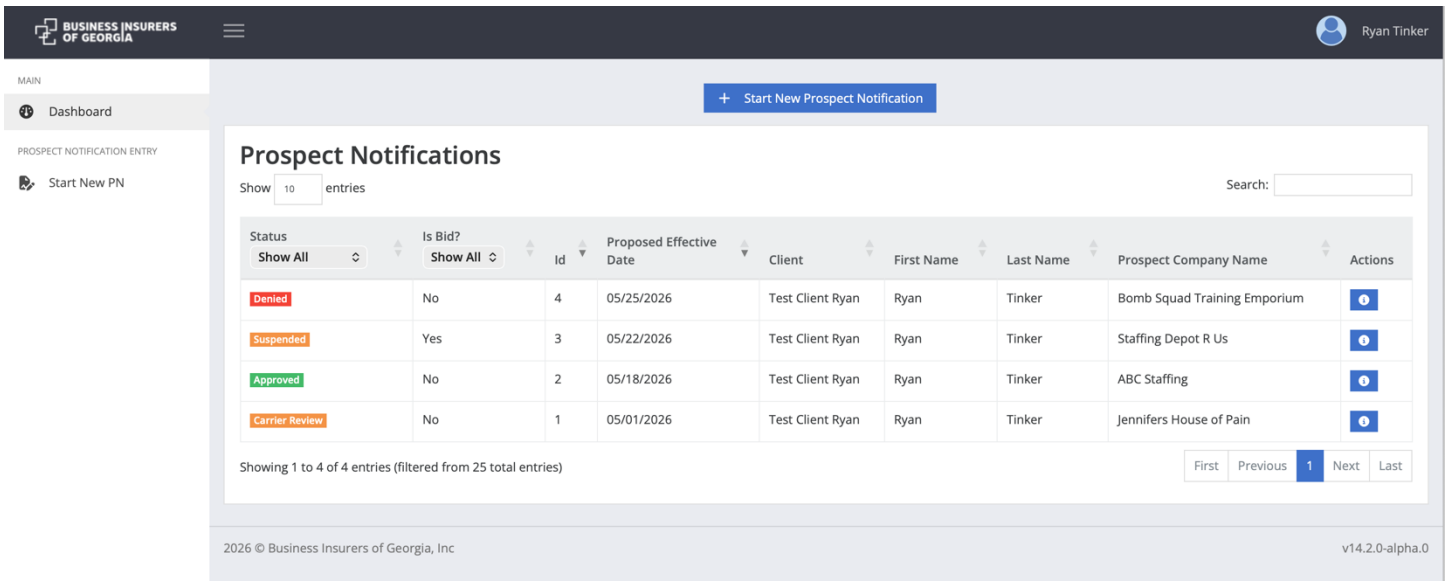
Business Insurers of Georgia's **Prospect Notification** form is now available through the client portal. To access the portal, open your internet browser and go to

## https://client.biofga.com

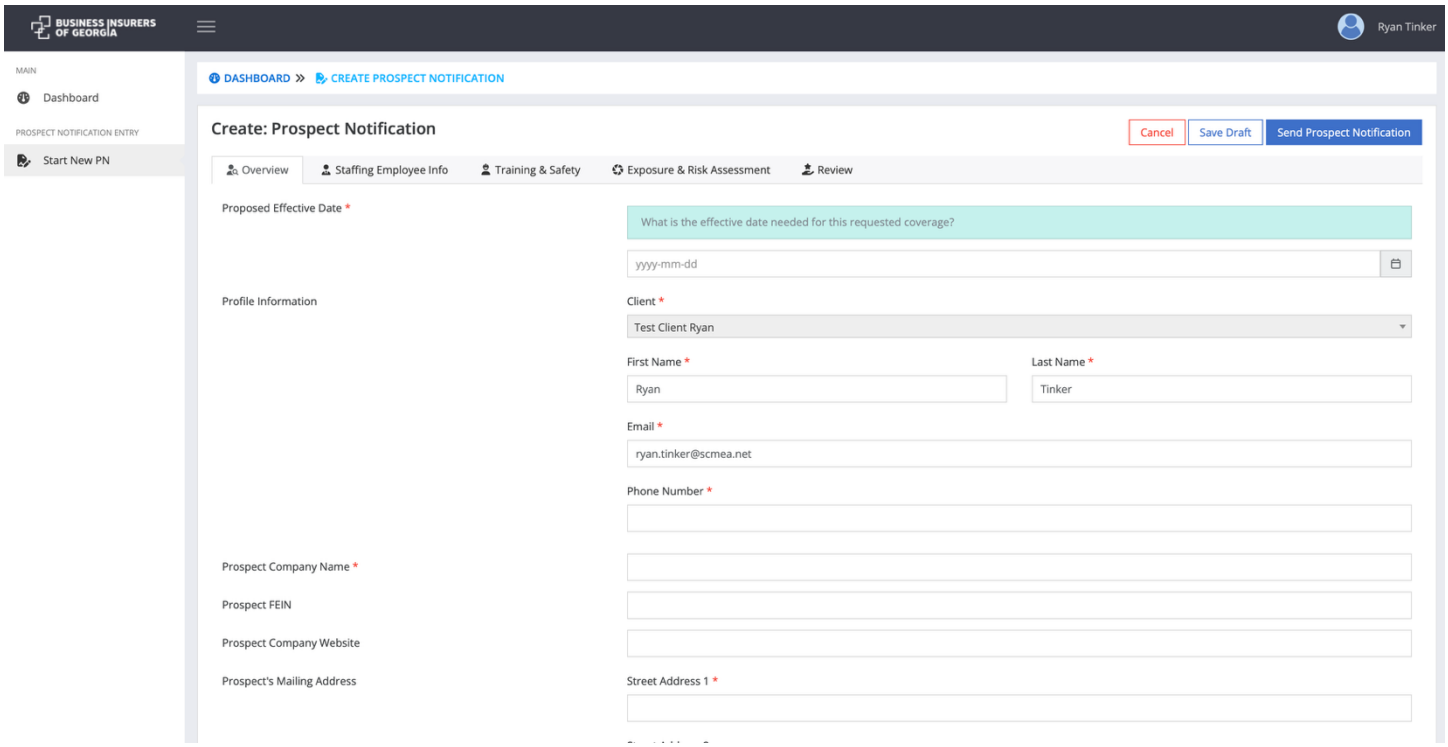
Provide your email address and password on the login screen:



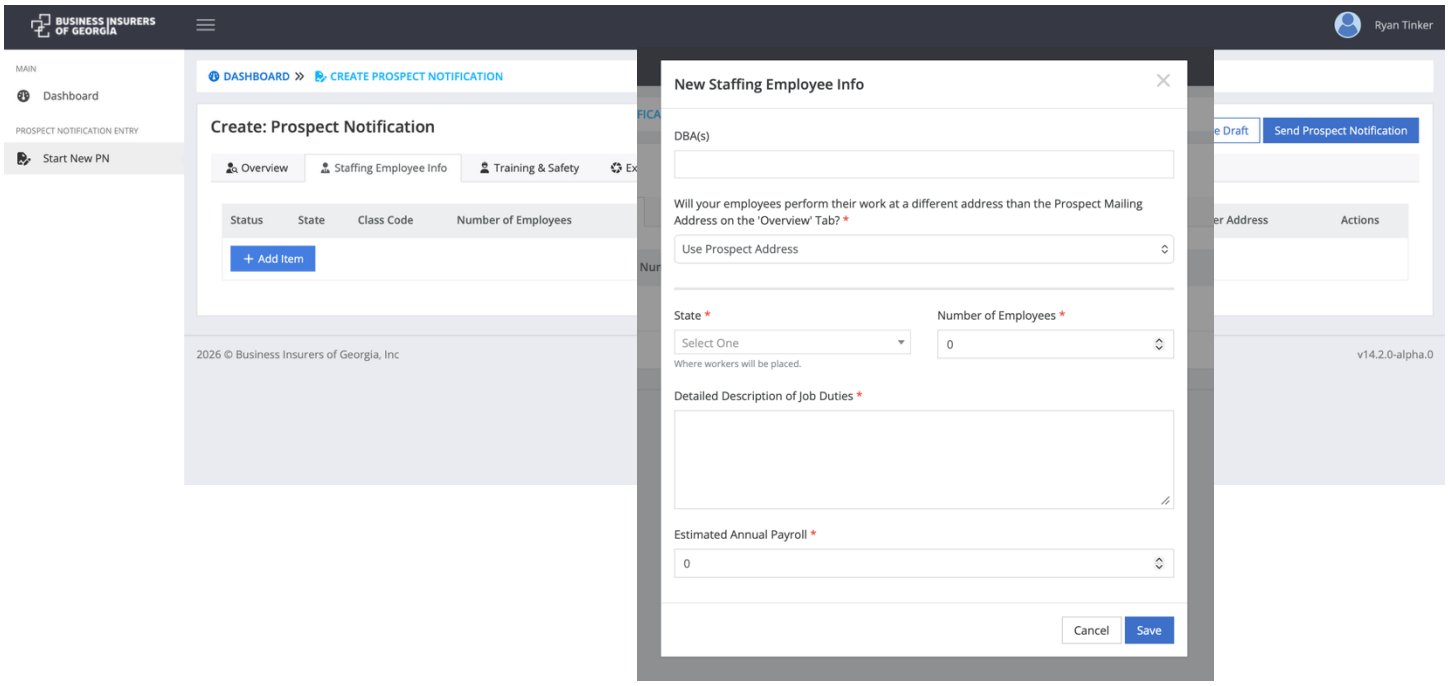

After you log in, the dashboard appears. If you submit Prospect Notifications, the dashboard displays a table of your recent submissions and the status of each one. To submit a new prospect, click **Start New PN** in the left navigation menu or use the blue button above the table.



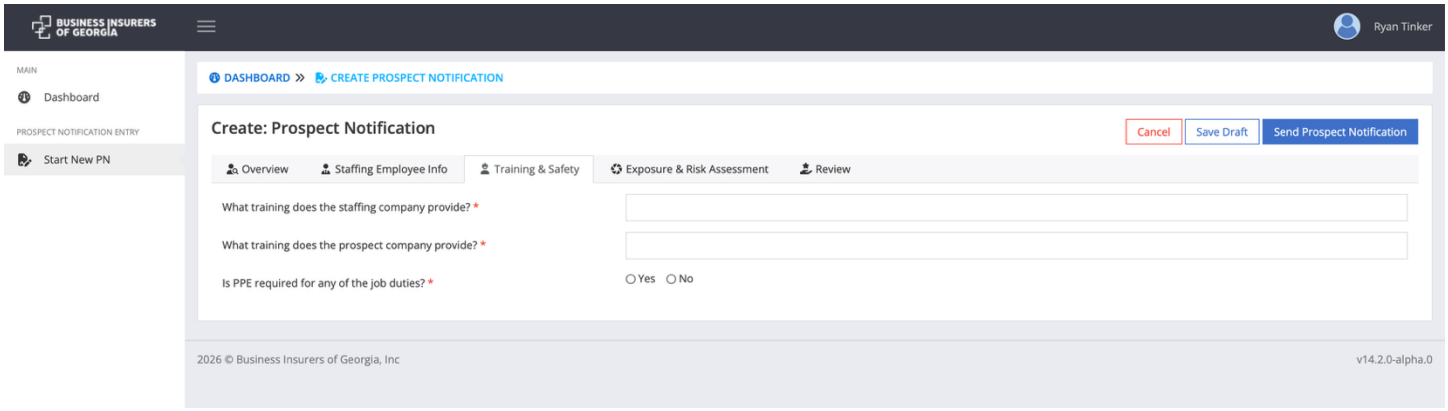
Use the **Prospect Notification Form** to provide the information our underwriting team and carrier need to evaluate prospective business and determine coverage eligibility. The form includes the following tabs: *Overview*, *Staffing Employee Info*, *Training and Safety*, *Exposure & Risk Assessment*, and *Review*. **Complete all required fields** on each tab before saving or submitting the form.

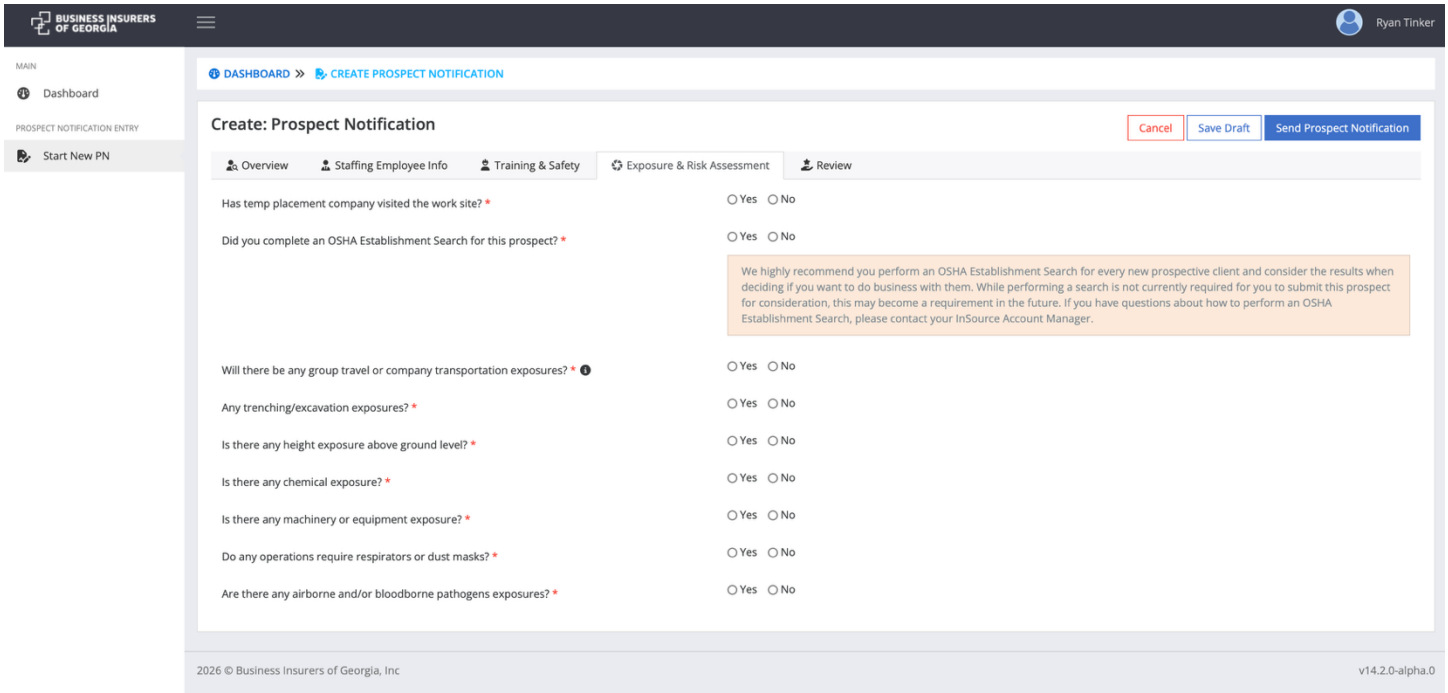



On the **Staffing Employee Info** tab, enter at least one row in the table and answer the applicable questions based on the work the employees will perform. You can add as many rows as needed to reflect the different job types associated with the prospective business.



The *Training & Safety* and *Exposure & Risk Assessment* tabs include questions about safety protocols and exposure risks. Provide detailed responses to support an efficient review and help avoid delays caused by follow-up questions.



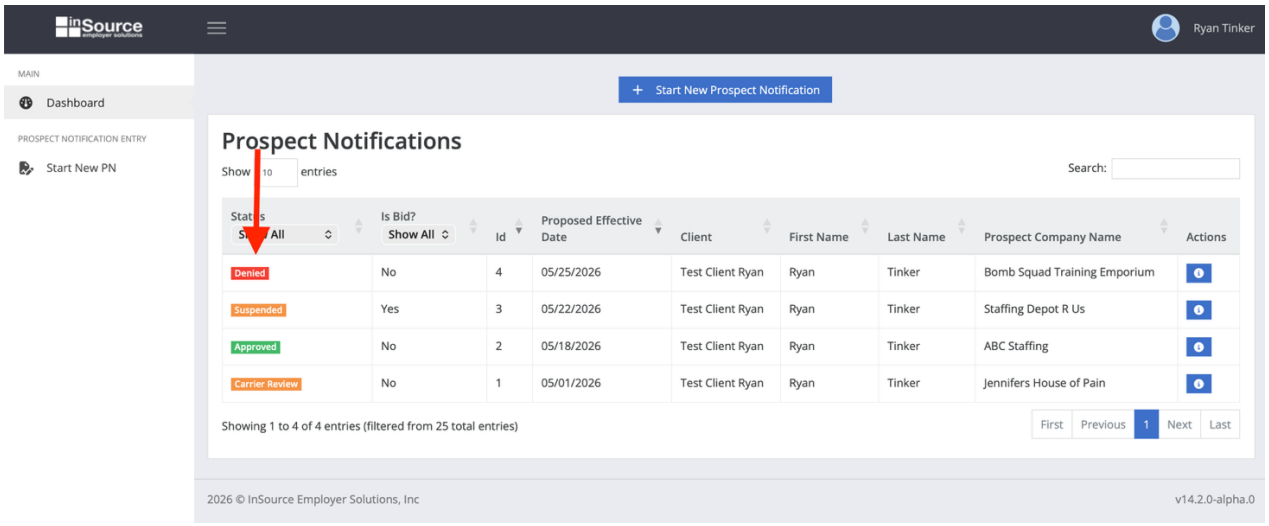



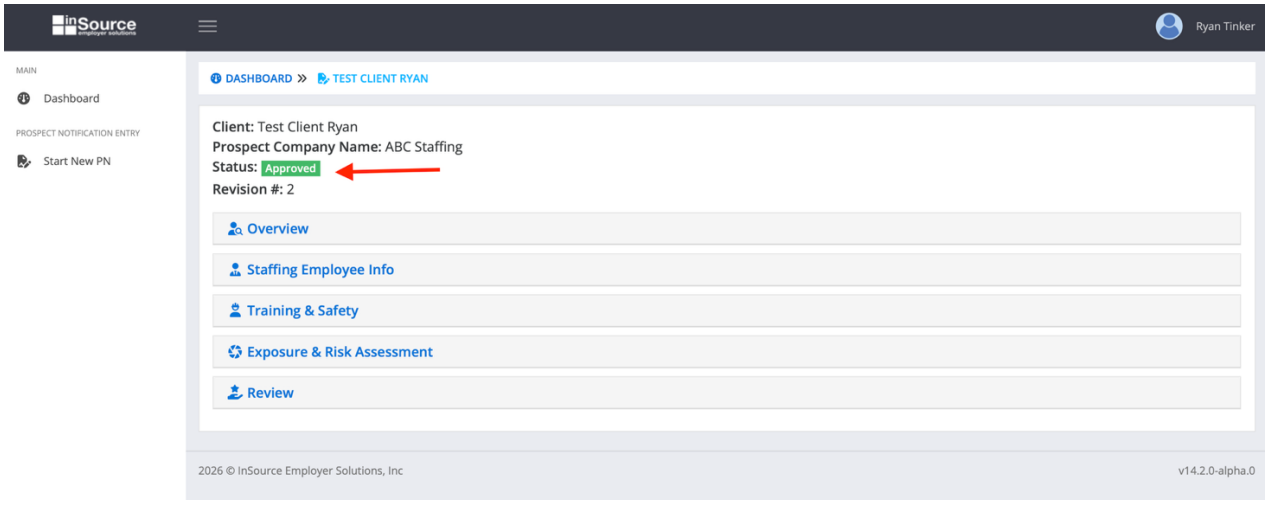

When you are ready to submit your Prospect Notification, complete the required information and consent on the *Review* tab, then click **Send Prospect Notification**. You will receive a confirmation email and can track your submission and its status directly in the client portal.

### Viewing Prospect Notification Status in the Client Portal

You can view the status of a Prospect Notification from your client dashboard or by opening the submitted PN. The status tags shown in the portal indicate the following:

- Submitted – Received by BIofGA and pending review.
- Processing – Currently under evaluation by BIofGA underwriting.
- Carrier Review – BIofGA has completed its review and submitted the Prospect Notification to the insurance carrier for review.
- Approved – The overall Prospect Notification has been approved. Review the *Staffing Employee Info* tab for approval details based on the requested coverage.
- Denied – The overall Prospect Notification was not approved by BIofGA or the carrier.
- Suspended – The Prospect Notification was reviewed and suspended because it is bid-only. Review the *Staffing Employee Info* tab for conditional approval details based on the requested coverage.
- Expired – Bid-only prospects have expired. To reactivate one, contact your BIofGA Account Manager. Additional review may be required to reinstate and endorse coverage.



### Account Manager Communications About Prospect Notifications

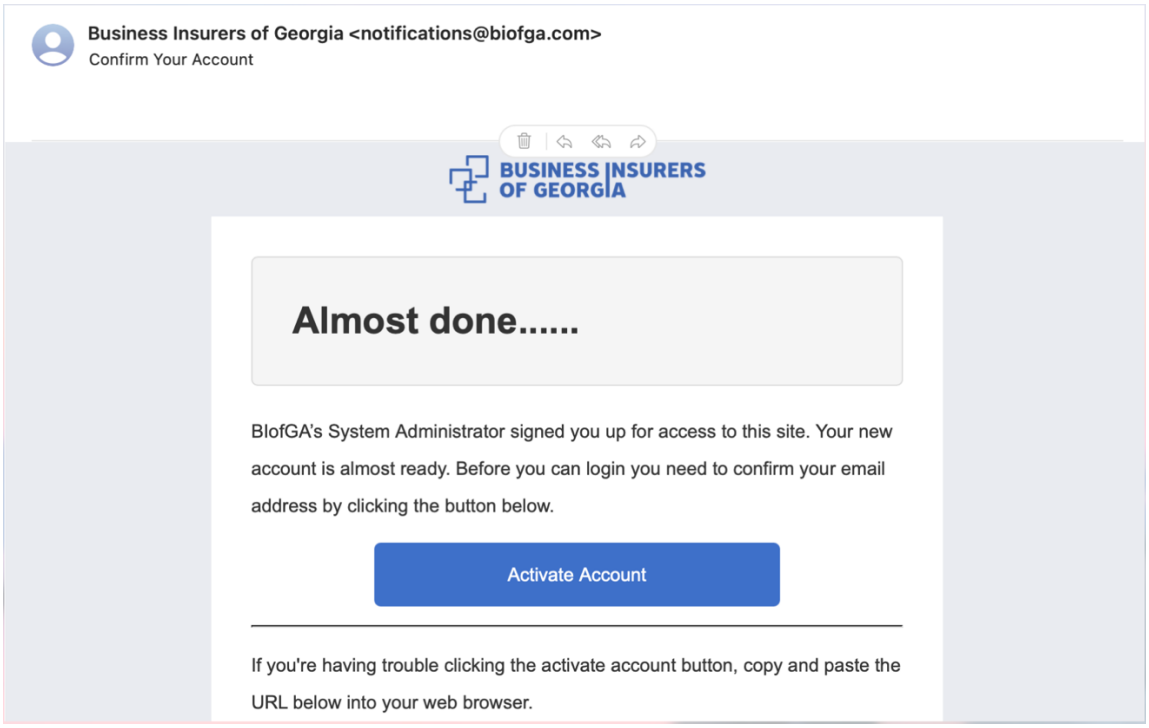
In addition to viewing your Prospect Notifications in the client portal, your assigned BIofGA Account Manager may contact you by email about follow-up items or request-specific details. Your Account Manager will also email you with the confirmed final status and certificates of insurance, endorsements, etc.

### Requesting Access to the Client Portal

If someone on your team needs access to the client portal, contact your BIofGA Account Manager and include the following information:

- First Name
- Last Name
- Email Address
- Phone Number

After we receive the request, our IT team will set up the account and send an activation email to the new user.




Activate the account as soon as possible, since the link expires for security reasons. Then follow the prompts to create a secure password and sign in to the portal.

If your activation link expires, email your BIofGA Account Manager and our IT team will send a new one.