

Instruction for CSR24 Your Website

1. Go to the internet <https://trustinnovise.com/>
2. At the top of the page you will click on the CSR24/7 Experience
3. Towards the bottom of the page you will click on CSR 24/7 Portal
4. A box will appear for you to put in your User Name and Password
5. First time signing on, you will be prompted to change your password.
6. HOME button in the left upper side of the web page follows you and you may click on it at any time to get back to the main dashboard page.
7. The 4 Blue short-cut Tiles in the center of the page are tasks which are the most common task and are also available on the left side of the page. Under each heading, there will be a drop down for more options.
8. Any time you click on "Submit" your request is then sent to our systems for documentation and your Account Manager is sent an email with your request.
9. Claims request go directly to our Risk Services Claims Intake center to be processed.
10. Documents will take you to the PDF of the documents such as Policies and Endorsements. No longer do you need to store your policies and endorsements as they will be stored here for you.
11. Policy Tile is a snap shot of your policy limits
12. The QR Code will allow any of your mobile devices to work with this program if you have down loaded the free QR Application for the App Store on your mobile device.

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