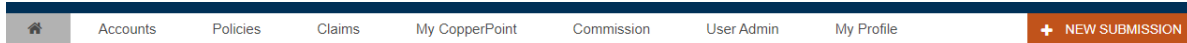# How to pull loss runs in the CopperPoint Portal

Last Updated March 10, 2022

After logging into the CopperPoint Portal at pe.copperpoint.com, you should be taken to the ProducerEngage home page

| | Accounts | Policies | Claims | My CopperPoint | Commission | User Admin | My Profile | + NEW SUBMISSION |

Search by account #, policy #, or customer details

You can use the search function to search by account #, policy #, or the business name. Please select the Account that you are looking for. Please note, that PacificComp policy numbers (WA-######) will not appear as part of the search function (use account number or named insured instead).

Search by account #, policy #, or customer details

5000047070

Search Results for "5000047070"

Account Results (1)
Test Insured
5000047070
1 Baxter Way,
Westlake Village , CA

From the Account page you should see a list of Issued Policies. Select the policy number.

Issued Policies

POLICY TYPE	POLICY #	STATUS	NAMED INSURED	POLICY TERM
Workers' Compensation (v7)	1023187	In Force	Test Insured	03/06/2022 - 03/06/2023

From the Policy view, select the Claims tile, where the Request Loss Run button is found.

SUMMARY	DOCUMENTS	CLAIMS	BILLING	PAYROLL REPORTING

Request Loss Run   Request CAR Report   Download Claim to Excel

Loss runs will be emailed to you (the email address used to log in) in PDF format shortly after selecting the Request Loss Run button. Up to five years of policy data will be included on the report.