



Risk Management Portal, Auto Liability, Out of state WC

Risk Management Portal Demo

Auto Module Overview

- All tagged vehicles (items with wheels) are added in this section
- Non-tagged vehicles are managed under **Master Mobile Equipment**

Key Features

- Automatic selection of liability coverage
- Option to add physical damage and other property coverages
- Ability to add, remove, update, and clone records
- Schedule reports – downloads your full schedule
- Generate Auto IDs

Additional Capabilities

- Make multiple changes across different policies prior to submission (displayed at top of screen)
- Submit claims directly through the portal

Home Screen

WELCOME TYLER BT PORTAL LUNSFORD PERSON ACCOUNT



NCAIA Portal

OSFM Portal

Home Screen Choose Agency

The screenshot displays the 'NC State' Home Screen. On the left is a dark blue sidebar with three tabs: 'Home' (with a house icon), 'Schedules' (with a calendar icon), and 'Claims' (with a document icon). The main content area has a dark blue header with a close button (X), the text 'NC State', a 'Go To Portal Home' button, and a user profile icon. Below the header is a 'Details' section with a light gray background. This section contains three columns of information: 'Name: NC State', 'Address: 2200 Hillsborough Street, Raleigh, North Carolina, NC, United States, US, 27607', 'Risk Advisor: Amy Gower' (with a profile icon), and 'Account Executive:' (with a profile icon). On the right side of the 'Details' section, there is a 'Your Accounts:' dropdown menu. The dropdown is open, showing a list of accounts: 'NC State' (selected), 'BT Test Business Account', 'East Carolina University', 'UNC Chapel Hill', and 'DNCR-Cultural Resources - Sympho'. A red box highlights the dropdown menu, and a red arrow points from the bottom of the box to the list of accounts.

- Choose your account/state agency in the top right if you manage more than one agency
- Your Agency Name & Address should be shown in the middle banner as well as the risk advisor and account executive that manages the account.
- On the left side you will see the main menu which is - home tab, schedules tab, and claims tab

Schedule Section

Home

Schedules

Claims

NC State

Go To Portal Home

Schedules

Name: NC State

Address: 2200 Hillsborough Street, Raleigh, North Carolina, NC, United States, US, 27607

Risk Advisor:

Amy Gower

Account Executive:

Pending Changes

Submitted On 1/13/2026, 1:54 PM by Tyler BT Portal Lunsford Person Account

Submitted On 1/13/2026, 1:56 PM by Tyler BT Portal Lunsford Person Account

Submitted On 1/13/2026, 1:59 PM by Tyler BT Portal Lunsford Person Account

Submitted On 1/31/2026, 12:18 PM by Tyler BT Portal Lunsford Person Account

Submitted On 2/2/2026, 8:39 AM by Tyler BT Portal Lunsford Person Account

Submitted On 2/2/2026, 11:23 AM by Tyler BT Portal Lunsford Person Account

Submitted On 2/3/2026, 10:47 AM by Tyler BT Portal Lunsford Person Account

Submitted On 2/3/2026, 10:58 AM by Tyler BT Portal Lunsford Person Account

Submitted On 2/18/2026, 11:30 AM by Tyler BT Portal Lunsford Person Account

Submitted On 3/30/2026, 11:22 AM by Tyler BT Portal Lunsford Person Account

Submitted On 3/30/2026, 1:30 PM by Tyler BT Portal Lunsford Person Account

Submitted On 3/30/2026, 1:40 PM by Tyler BT Portal Lunsford Person Account

Submitted On 3/30/2026, 1:54 PM by Tyler BT Portal Lunsford Person Account

Automobiles

Schedule Report

Automobiles (3)

+ Add New

Generate Auto Ids

Year	Make	Model	VIN #	Client Vehicle #	Value	Plate	Action
2020	Test	Ford	TER34343		42000	XYZ2345	
2020	Test	Truck	RSRS43432		45000		
2024	Honda	Civic	876545678				

5

The logo for the Oregon State Fire Marshal (OSFM) is located in the bottom right corner. It features a stylized red and yellow flame above the letters "OSFM" in a bold, red, serif font.

Drop Down of Schedules

Automobiles ▾

Automobiles

Master Mobiles

Master Equipment

Drones (Unmanned Aircrafts)

Boilers

Golf Carts

WORK COMP

Symphony Instruments

Student Blanket

Schedule Report

+ Add New

Generate Auto Ids

Model ▾	VIN # ▾	Client Vehicle # ▾	Value ▾	Plate ▾	Action
d	TER34343		42000	XYZ2345	
k	RSRS43432		45000		
c	876545678				

NORTH CAROLINA | ⚡



Specific Buttons

Schedule Report

+ Add New

Generate Auto Ids

↕	Value	↕	Plate	↕	Action
	42000		XYZ2345		  
	45000				  
					  

- Yellow Button – Edit
- Red Button – Delete (remove from policy effective _____ date)
- Blue Button – Clone – NEW FUNCTION – If you have a similar vehicle that is already on the policy, you can duplicate what you have for that one & then just change the parts you need to (VIN or Value, or Plate number)
- Schedule Report – Will download you spreadsheet in excel format
- Add New – add a new vehicle not currently on the policy
- Generate Auto IDs – NEW FUNCTION – you can choose a specific vehicle for the ID, or print for the fleet

Vehicle Tab for Add/clone/edit

Edit Automobile - TER34343: Test Ford

Vehicle	Loss Payee	Coverage	Garaged At	Notes
Department				
ADMINISTRATIVE HEARINGS				
*Year		*Make		
2020		Test		
*Model		*VIN #		
Ford		TER34343		
Client Vehicle #		*Value		
		42000		
*Plate		*Classification		
XYZ2345		Private Passenger Cars		
All Red marked fields are required – PLEASE use accurate information				
SubmitCancel				

Coverage Tab

Edit Automobile - TER34343: Test Ford

Vehicle

Loss Payee

Coverage

Garaged At

Notes

Liability Cutoff Date: 3/1; Physical Damage Cutoff Date: 4/15

Coverage:

*Effective From

Liability ☒

Comprehensive ☒

Med Pay ☒

Collision ☒

Fire ☐

Theft ☐

Number of Days

Liability Rate

Liability Audit Rate

Collision Annual Rate

Collision Period Premium

Comprehensive Annual Rate

Comprehensive Period Premium

Medpay Rate

Medpay Audit Rate

All Red marked fields are required – PLEASE use accurate information

Auto Liability coverage will be marked & you can choose the other options, remember med pay is required for 15 passenger vans.
If you choose COMP – fire & theft is already included in that coverage – so don't mark it separately.

Submit

Cancel

Delete Vehicle/Equipment

Remove Automobile - TER34343: Test Ford

Department

ADMINISTRATIVE HEARINGS

Year

2020

Make

Test

Model

Ford

VIN #

TER34343

Client Vehicle #

Value

42000

Plate

XYZ2345

Classification

Private Passenger Cars

Coverage:

*Removed From

Liability

Med Pay

Collision

Fire

Theft

Liability Rate

Liability Audit Rate

Collision Period Premium

Comprehensive Period Premium

Medpay Rate

Medpay Audit Rate

April 2026

Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

Submit

Cancel

Generate Auto ID

Generate Auto Ids

Auto Id

State Format

North Carolina

Auto Id Generation (Scheduled Items)

Name Insured (Max 240 chars)

NC State

Street

City

State

Postal Code

2200 Hillsborough Street

Raleigh

North Carolina

27607

Country

United States

☐ Fleet

☒ Print Client Vehicle # on ID Card

Choose Policy

TEST9887897899999999 - Commercial Package - 11/6/2025 - 11/6/2026

Scheduled Items (For bulk printing, only 10 records can be selected)

Please enter 3 or more characters to search

	Name	Vehicle #	Year	Make	Model	VIN	Client Vehicle #	Garaging City	Garaging State
☒	SI-006522	12	2024	Honda	Civic	876545678		Columbus	OH
☐	SI-006549	5	2020	Test	Truck	RSRS43432			
☐	SI-006559	6	2020	Test	Ford	TER34343			

Cancel

Download

Fleet ID cards - No VIN printed

Generate Auto Ids

Auto Id

State Format

North Carolina

Auto Id Generation (Scheduled Items)

Name Insured (Max 240 chars)

NC State

Street

City

State

Postal Code

2200 Hillsborough Street

Raleigh

North Carolina

27607

Country

United States

☒ Fleet

Choose Policy

--None--

--None--

TEST9887897899999999 - Commercial Package - 11/6/2025 - 11/6/2026

Test AB IIANC - Commercial Package - 11/6/2025 - 11/6/2026

Auto ID for specific vehicles/policies

Generate Auto Ids

Auto Id

State Format

North Carolina

Auto Id Generation (Scheduled Items)

Name Insured (Max 240 chars)

NC State

Street

City

State

Postal Code

2200 Hillsborough Street

Raleigh

North Carolina

27607

Country

United States

☐ Fleet

☐ Print Client Vehicle # on ID Card

Choose Policy

--None--

Scheduled Items (For bulk printing, only 10 records can be selected)

Please enter 3 or more characters to search

	Name	Vehicle #	Year	Make	Model	VIN	Client Vehicle #	Garaging City	Garaging State
☐	SI-006522	12	2024	Honda	Civic	876545678		Columbus	OH
☐	SI-006549	5	2020	Test	Truck	RSRS43432			
☐	SI-006559	6	2020	Test	Ford	TER34343			

Cancel

Download

Unsubmitted Changes

Claims

Pending Changes

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Unsubmitted Changes

Automobiles

Submit

Automobiles

Schedule Report

Automobiles (3)

+ Add New

Generate Auto Ids

Year	Make	Model	VIN #	Client Vehicle #	Value	Plate	Action
2020	Test	Ford	TER34343		42000	XYZ2345	  
2020	Test	Truck	RSRS43432		45000		  
2024	Honda	Civic	876545678				  

Submitted Changes

Claims	Pending Changes
	▶ Submitted On 1/13/2026, 1:54 PM by Tyler BT Portal Lunsford Person Account
	▶ Submitted On 1/13/2026, 1:56 PM by Tyler BT Portal Lunsford Person Account
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	▶ Submitted On 3/30/2026, 1:30 PM by Tyler BT Portal Lunsford Person Account
	▶ Submitted On 3/30/2026, 1:40 PM by Tyler BT Portal Lunsford Person Account

This will show changes that have been submitted to NCAIA – but not yet approved. This includes the person submitting the changes & the date/time sent to NCAIA for approval. After it is approved, it will no longer show in the list – it will just appear in your schedule.

Claims Portal



NC State

[Go To Portal Home](#)



Home

Schedules

Claims

Claims

Name: NC State

Address: 2200 Hillsborough Street, Raleigh, North Carolina, NC,
United States, US, 27607

Risk Advisor:

Amy Gower

Account Executive:



Report a claim by selecting an option below:

Auto

Manned Aviation

Boats

Boilers

Drones

Fine Arts

Inland Marine

Student Professional Liability

Your Previously Reported Claims

Claim Number	Account	Contact	Claim Type	Policy Number	Status	Reason	Loss Date	Closed Date	Actual Amount
No Records found.									

Risk Management Portal – Future Enhancements

Upcoming Features

- Upload schedules directly within the portal
- Access and print policies, endorsements, and related documents
- View invoices and billing details

Expanded Functionality

- Additional policies and modules will be integrated as renewals occur throughout the year

Auto Liability Audit

We are still missing submissions from many state agencies/universities — it was due in February.

Data Collection Requirements

- VINs required for all tagged vehicles
- Serial numbers required for mobile equipment
- Some agencies and universities may have unreported vehicles — please ensure all are included

Reporting Guidelines

- Do **not** report Motor Fleet vehicles (handled separately by Motor Fleet)
- Physical damage/property coverage requires a reported value

Auto Liability Audit

Coverage Placement Basics

- Tagged vehicles → Auto Policy
- Non-tagged vehicles (anything on wheels) → Master Mobile Equipment

Examples of Mobile Equipment

- Golf carts (if tagged for road use it can be put on the auto PD)
- Tractors, crawlers, loaders, all farm equipment on wheels
- ATVs
- Forklifts

Note: These items are now required to be placed on the Master Mobile Units policy (no longer optional under Auto PD).

More Auto Liability Information

Important Reminder

- **All vehicles** (autos and mobile equipment) must be entered under either Auto or Master Mobile for liability coverage
- Physical damage/property coverage remains optional

Hired Non -Owned (HNO) Policy

- Provides physical damage coverage for **incidental**, **short -term rentals** (e.g., conferences, brief use)
- Not intended for extended rentals
- Long-term rentals should be placed through **Motor Fleet**
- We are working on a more up to date policy on this, but essentially it is designed for Auto PD coverage for rentals such as out of state conference, or very short term need – not ongoing projects.

Auto Liability Audit

- We are capturing VINs for all tagged autos & Serial Numbers for mobile equipment for the liability audit this year.
- Do not report your Motor Fleet Vehicles – motor fleet reports these
- If you need physical damage/property coverage we **must** have a value
- Basics
 - If it has tags – it goes on auto policy
 - If it is not a tagged vehicle (anything on wheels) – it goes on Master Mobile
 - Golf carts, tractors, ATVs, forklifts, etc. – This is now a requirement and not optional on the auto PD policy.
 - ALL vehicles (autos & mobile equipment) will need to be entered in one of these two places for liability insurance. You can choose if you want physical damage/property coverage.
- Hired Non -Owned Policy
 - Purpose – for physical damage coverage for incidental rentals (traveling for a conference, very short -term need)
 - Not intended for extended rentals – those can be done through Motor Fleet

Master Inland Marine Policies

Policy Type	What It Covers	Examples
Mobile Units	Non-tagged or upfitted vehicles	Command units, food trucks
Equipment (MEP)	Equipment not on wheels (medical, computerized, non-computerized, oceanographic)	MRI, computers, gym equipment
Leased Modular Units	Temporary/mobile office structures	Modular offices, trailers
Boats	Watercraft and trailers	Boats, boat trailers
Fine Arts	Unique, high-value, fragile property	Paintings, sculptures, rare books

Out of State WC Policy

Policy Overview

- Master policy established for all state agencies
- **Effective Date:** March 19, 2026

Who Must Be Added to This Policy

- Employees who **live and work outside of North Carolina**
- Remote employees living in another state and working from home

Who Is Covered Under the Standard NC Workers' Compensation Program

- Employees living in a **border state** but working in North Carolina
- Employees living in North Carolina who **occasionally travel out of state** (e.g., conferences, short -term travel)
- Employees who live and work in NC (most state employees)

Other Portal Updates!

Garrett Beatty

What will the future bring?

The auto policy will be live in the portal soon... but what else is coming?

1. **Watercraft Policy**
2. **Manned and Unmanned Aviation policies**
3. **Fine Arts Policy**

We hope to have the aviation and watercraft policies up and running in the Portal system by October 2026.

Fine Arts will come by next year, in March 2027.



Sneak Peek!



What will the benefits be?

The four formerly mentioned policies have one thing in common... **SPREADSHEETS**. We have been tracking your schedules using spreadsheets for the last 10-20 years, and we want to introduce a more streamlined process!

The goal of having these policies in the portal, is to **REDUCE** the amount of physical upkeep using spreadsheets and have a system consistent with the State's Automobile policy.

This will lower your wait times, correspondence, manual work around renewals, and overall provide an intuitive experience that you'd expect with the technology available in 2026.

Changes for Required Info?

- **Aviation:**
 1. **Manned Aviation:** N#, Make/Model, Year, Seats & Capacity, Hull Value.
 2. **Unmanned Aviation:** Operator, Registration #, Year, Make/Model, Hull Value.
- **Watercraft:** Location, Year, Make/Model, Serial #, Hull Value, Asset Number.

This is the information we currently track on spreadsheets. To keep things simple, we will track the same information in the portal. Hopefully, there are no surprises here!

- **Fine Arts:** Work in progress! After requesting asset lists from covered entities, we received a variety of lists, and formats for tracking artwork. Here is a preliminary example of what we are looking to track in the portal:

Example: Artist Name, Object Name / Title, Date, Value, Location

Why the new requirement for Fine Art?

Historically, we have never asked for an asset list at renewal. Since my handling of the state's Fine Art policy, we ran into several entities that had no idea what was covered under this policy. A total TIV would be reported at renewal, but there was confusion around which individual item(s) made up the total.

OSFM also discovered instances where Fine Art was scheduled under the State Property Insurance Fund.

We hope this new requirement will allow us to clean up overlap with the State Property Fund, and ensure each piece is properly documented, valued, and protected.



Thank you!

Any Questions?