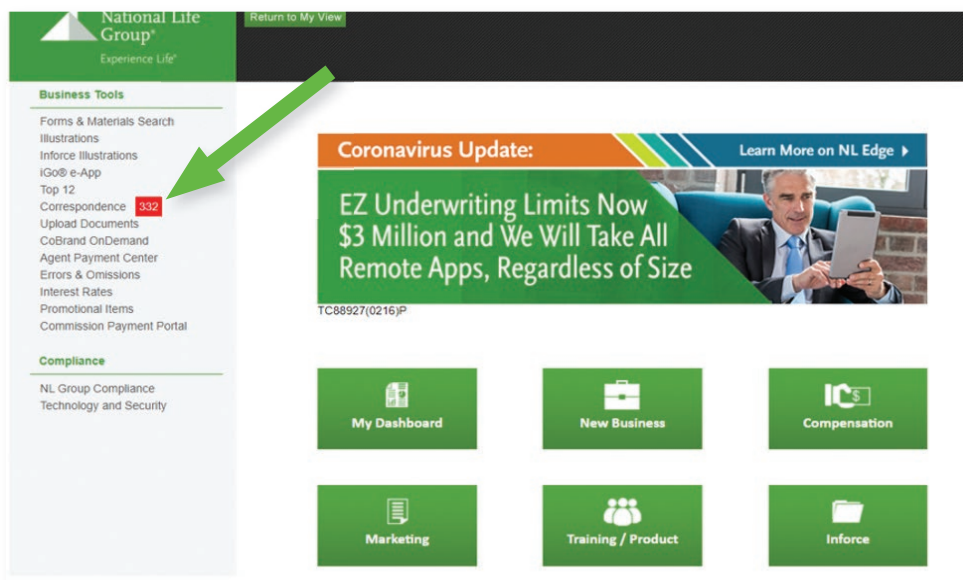


# How To:

## CLIENT POLICY LOOK UP

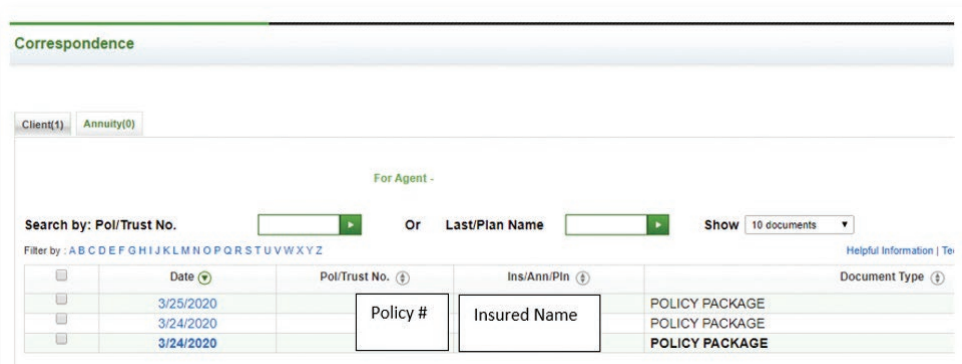
### Agent View/Access:

1. Log into the **NLG Agent Portal**
2. Navigate to the **Business Tools** menu > **Correspondence**



3. Under **Correspondence**:

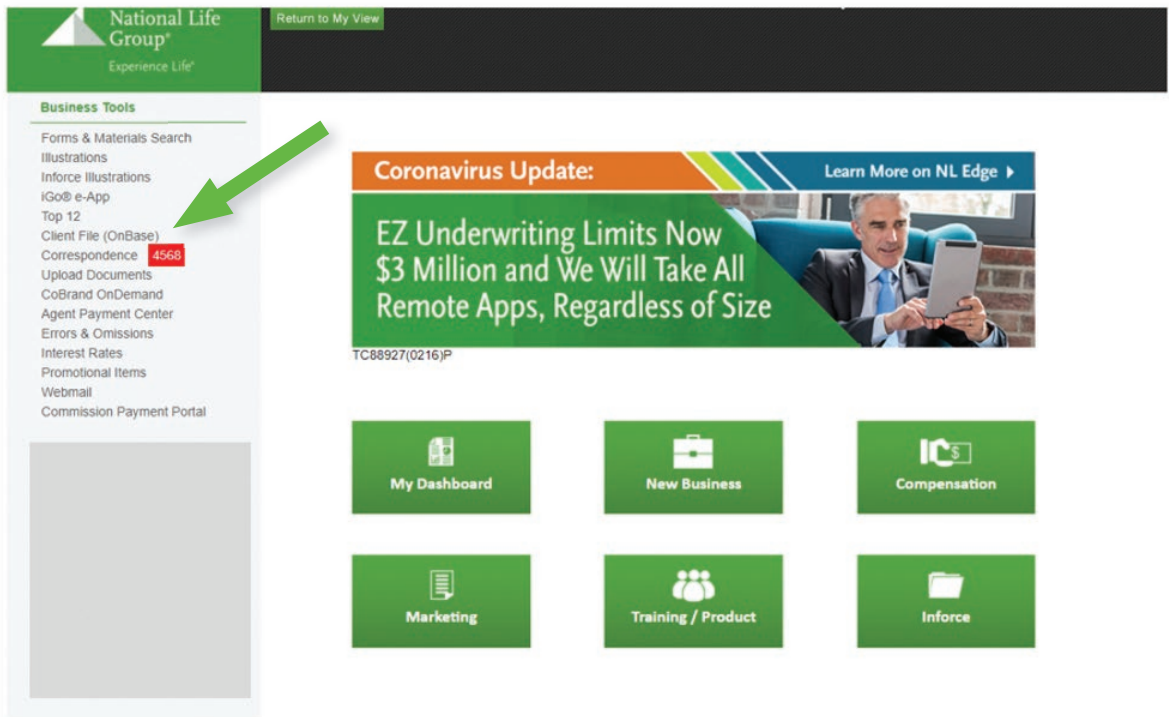
- Find the client policy by **Pol/Trust No. or Ins/Ann/Pln**
  - Find **Document Type** > **POLICY PACKAGE**; click on the **Date** to pull the policy document
- Note: There may be several Policy Packages per policy – one of these will have the full policy information*



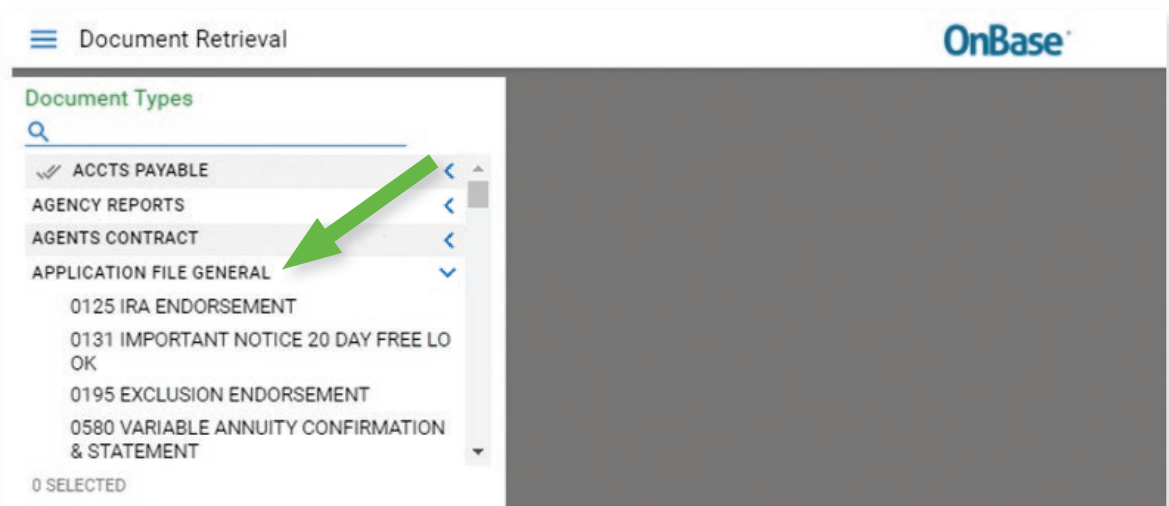
## Office Manager/Agent Assistant with On Base Access/View:

These users can follow the same process as an agent via **Correspondence** to access **Policy Packages**.

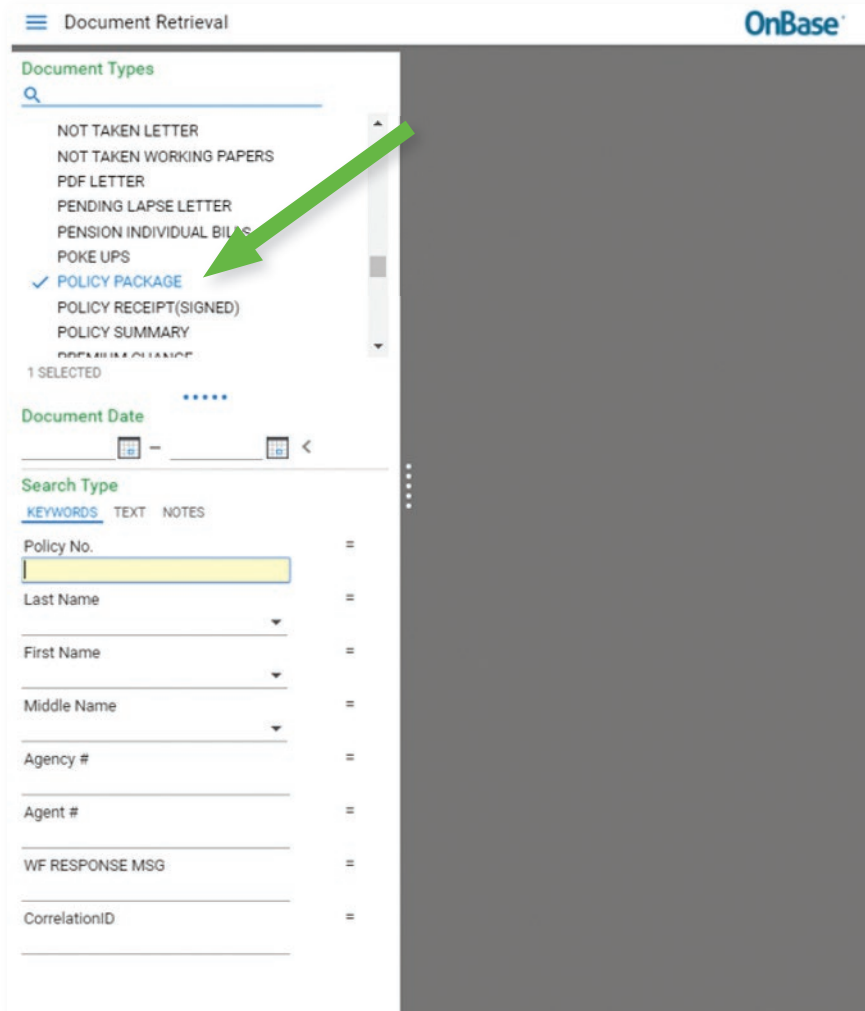
1. Log into the **NLG Agent Portal**
2. Navigate to the **Business Tools** menu > **Client File (OnBase)**



3. Navigate in Client File > **APPLICATION FILE GENERAL**



4. Scroll down the document options to **POLICY PACKAGE**



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