AGENT QUICK REFERENCE GUIDE

Reviewing Reports

Step-by-step instructions for reviewing reports within the LUBA Connect Portal.

1 Access the Portal

- Go to **lubawc.com**, click **Sign In**, choose **Agent Profile**, and enter your credentials.

2 Navigate to Reports

- From the dashboard, select the **Reports** tab from the main menu.

3 Choose the Report Type

- **Agency Claim Size** — generate reports with date-range and status filters.
- **Agency Loss Summary** — claims and losses grouped by location, policy, or status.
- **Agency Top 20 Claims** — the 20 most significant claims with amounts and injury dates.
- **Agency Loss Run** — claim history with dates, amounts, policy years, and locations.

4 Apply Filters

- Filter by Date Range — Last Month, Last 3 Months, or Custom.
- Filter by Policy Number, Claim Number, or Insured Name.

5 View Report Details

- Click the report you want to view to display its detailed data points.

6 Export & Log Out

- Use the **Export** option to download a report for offline use, then log out for security.

Tip: Apply date and policy filters before exporting to keep your agency reports focused and accurate.