

Guidelines for CSO's Secure Application Portal www.cso.com

The following instructions will provide you with the information needed to register your account and provide information regarding the applications available to you.

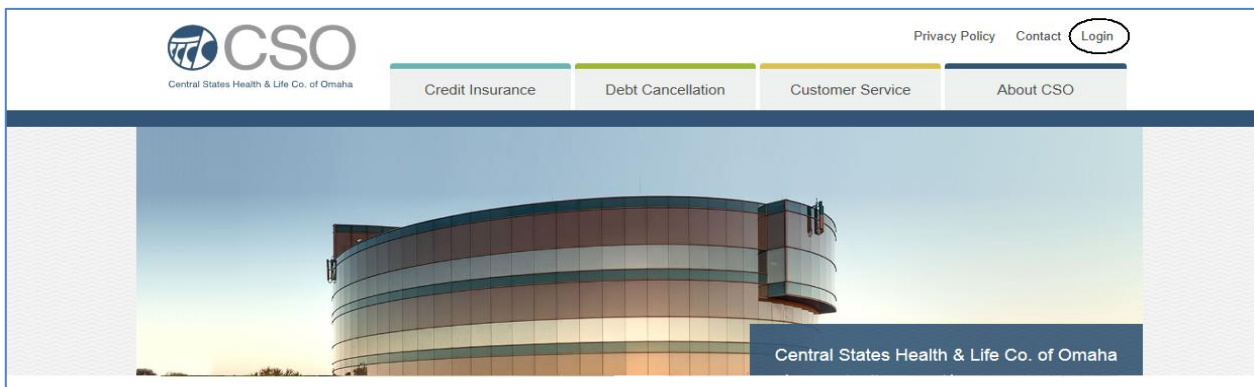
Once you register, following are the applications that may be available to you:

- **Cancellation Quote** – This application will allow you to receive an online cancellation quote to ensure you have the correct refund amount.
- **Proof of Payoff Notice** - This application will give you access to the Proof of Payoff Notice received from one of your customers.
- **Business Submission Form** - This application allows you to print a Credit Report of New Business and Cancellations, Form 601.
- **QuikCalc Download** – This application allows you to download the QuikCalc Premium and Refund Quoting program for your use.
- **Claim Status** – This application allows you to view recent claim activity for your customers.

Not all applications are available to all accounts. If you have any questions, feel free to call us at 1-800-826-6587.

Getting Started

From the CSO website, click Login in the upper right corner to sign into the Secure Application Portal.



The main login page will be displayed. If you have not registered, follow the procedures under *First Time Users*. If you have previously registered, follow the procedures under *Registered Users*. From the main login page, you can also:

- View the Registration Guidelines by selecting the 'Click Here For Registration Guidelines' link.
- Reset Your Password by selecting the 'Forgot your password?' link.


A screenshot of the CSO login page. At the top left is the CSO logo and contact information: "Central States Health & Life Co. of Omaha 1-800-826-6587". To the right is a navigation menu with "Credit Insurance", "Debt Cancellation", "Customer Service", and "About CSO". In the top right corner are links for "Privacy Policy", "Contact", and "Login". Below the navigation menu is a welcome message: "Welcome to the Central States Health & Life Co. of Omaha (CSO) website. The information contained in this section of the website is secured and only accessible by registered users. If you have previously registered, you may proceed to login. Otherwise, select 'New Users Click Here to Register'. If you have any questions, please contact us at 800-826-6587". Below the welcome message is a login form with two input fields: "User:" and "Pwd:". Below the input fields is a blue "Login" button. Below the button are two links: "Forgot your password?" and "New Users Click Here to Register". At the bottom right of the page is a link: "Click Here For Registration Guidelines".

- **First Time Users**

- Select 'New Users Click Here to Register'
- Complete the information on the registration form

First Name:
 Last Name:
 E-Mail Address: Activation link will be sent to this e-mail address
 Account No.:
 State Abbr.:
 User Name:
 Password: 8 or more characters
 Verify Password:

- Enter your First and Last Name in the appropriate fields.
- Enter a valid email address.
- Enter your CSO account number and state. If you have more than one number, enter one valid combination to register. You can add additional account numbers to your profile after you log in.
- You may select a Username of your choice.
- The password must contain at least 8 characters.
- Click Register after all information is completed. Once the account information is verified, a message will appear indicating the registration is almost complete.
- An email will be sent to you to finish the registration process.


Privacy Policy Contact Login

Credit Insurance
Debt Cancellation
Customer Service
About CSO

CSO Website Registration Confirmation
You're Almost Done - Please Activate Your CSO Website Registration!
 Thank you for registering, an e-mail has been sent to you to finalize your registration.

- Log into your email account.
- Following is a sample of the email you will receive.


Ektron@csso.com
 06/25/2014 02:32 PM

To: sfadmin@csso.com
 cc:
 bcc:
 Subject: CSO Website Registration Confirmation

Please visit the link below to confirm your registration. To do so, [Click here](#) or copy and paste the link below to your web browser.
<http://test.csso.com/activateuser.aspx?uid=freddy&acc=d38bbc58d9d147bfb735a4482e0b38f7>

- The easiest way to confirm your registration is to '[Click Here](#)'. You can also copy and paste the link in the email to your web browser.
 - Once you click on the link, your web browser will open and the following window will display asking you to activate your account.

Once you click Activate, a message will display indicating your account has been activated.

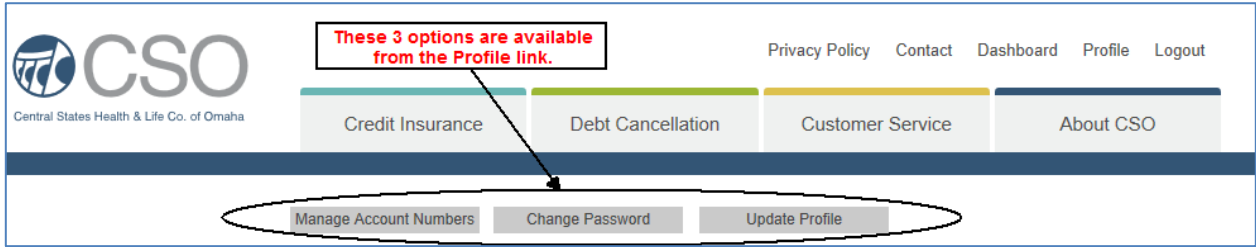
- If you want to log in at this time, you can select '[Click here to login](#)'. This will direct you to the main login page. See instructions under '**Registered Users**'.

- **Registered Users**

- Click on Login in the upper right corner of the home page.
 - On the Login screen, enter your username and password.
 - Click Login.

- Once you are logged in, a list of applications available to you will be displayed on the Secure Application Portal. Along with the available applications the Profile tab allows you to manage information related to your username.

- **Profile** allows you to manage your account numbers, change your password, or update your name or email address.



- **Add or Remove Account Numbers**

- Select **Manage Account Numbers** under the Profile link to view the account numbers associated with your username.

Manage Account Numbers for: ACCTTEST

+ Add new record

		User Name	Account No	State	Account Type	Account Name
✗	Edit	ACCTTEST	5566778	ID	Debt Cancellation	ABC Motors
✗	Edit	ACCTTEST	9876543210	TX	American Heritage	ABC Chevy
✗	Edit	AcctTest	1234567890	TX	Credit Insurance	ABC Chevy

- To Add Additional Account Numbers

- Select **Add New Record**

- Enter the Account Number and State that you want to add to your profile.

- If the account number and state combination are correct, the number will be added to the list displayed on the Manage Account Numbers screen. If the account number and state are incorrect, a message will appear indicating Invalid Account/State Combination.

- To Remove an Account Numbers

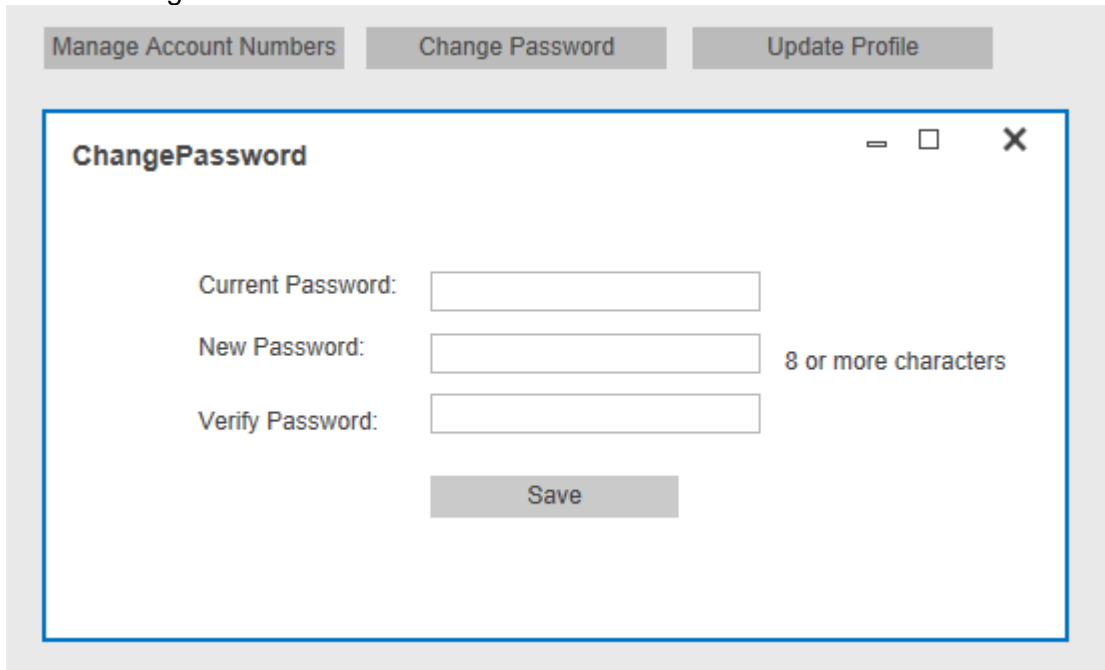
- From the list of accounts on the Manage Account Numbers screen, click on the X preceding the number you want to remove.

Manage Account Numbers for: ACCTTEST

+ Add new record

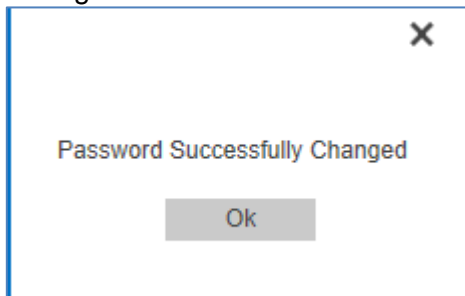
		User Name	Account No	State	Account Type	Account Name
✗	Edit	ACCTTEST	5566778	ID	Debt Cancellation	ABC Motors
✗	Edit	ACCTTEST	9876543210	TX	American Heritage	ABC Chevy
✗	Edit	AcctTest	1234567890	TX	Credit Insurance	ABC Chevy

- **To Change Your Password**
 - Select Change Password.



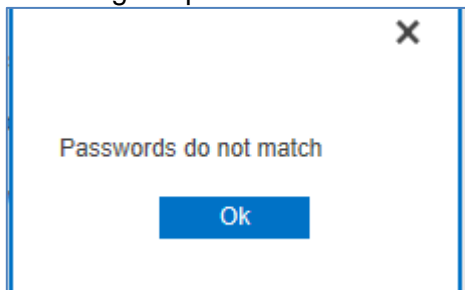
The screenshot shows a web interface with three tabs: "Manage Account Numbers", "Change Password", and "Update Profile". The "Change Password" tab is active. Below the tabs is a window titled "ChangePassword" with a close button (X) in the top right corner. The window contains three input fields: "Current Password:", "New Password:", and "Verify Password:". To the right of the "New Password:" field, there is a requirement: "8 or more characters". Below the input fields is a "Save" button.

- Enter your Current Password
- Enter your New Password
- Verify Password by entering the new password again.
 - If the Verify Password matches the New Password entered, a message will appear indicating your password has been successfully change. Click Ok to return to the Change Password screen.



The screenshot shows a message box with a close button (X) in the top right corner. The message text is "Password Successfully Changed". Below the message is an "Ok" button.

- If the Verify Password does not match the New Password, a message will appear indicating the passwords do not match.



The screenshot shows a message box with a close button (X) in the top right corner. The message text is "Passwords do not match". Below the message is an "Ok" button.

- Close the Change Password screen by clicking on the X in the right hand corner of the window.

- **To Change Your Personal Information**

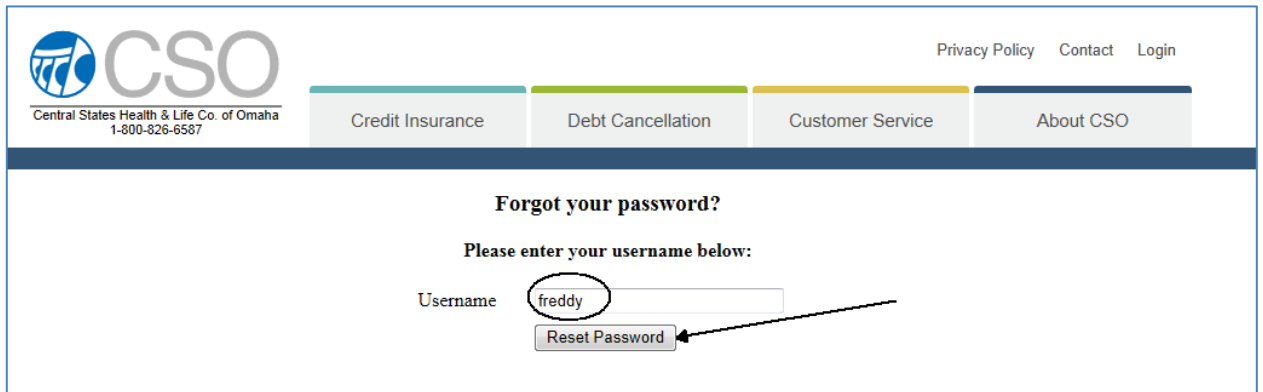
- Click on Update Profile to change or correct your:
 - First Name
 - Last Name
 - Email Address
- If your name or email address has changed, enter the new information in the corresponding field.
- Select Save.

- **To Return to the Secure Application Portal**

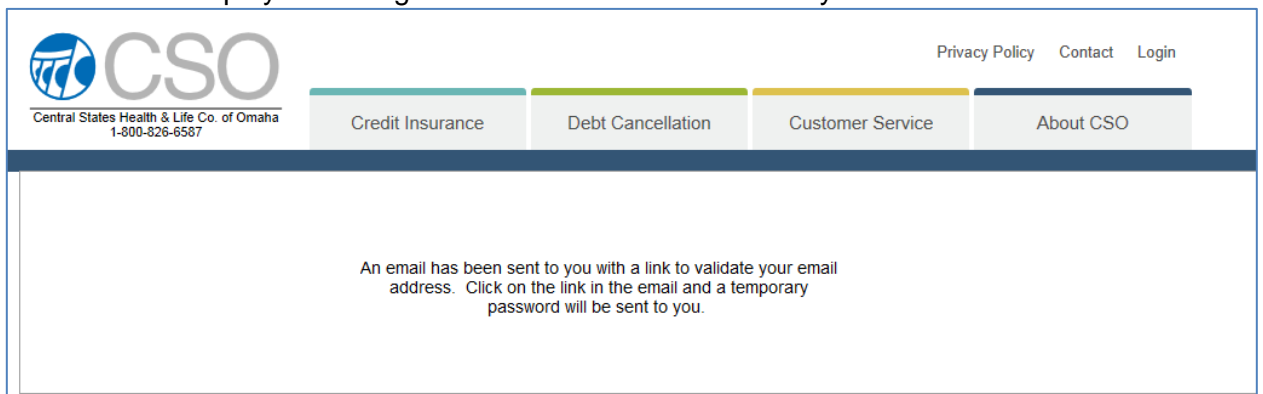
- As long as you are still logged into the website, click on Dashboard from any page to return to the list of applications.

- **Forgot your Password**

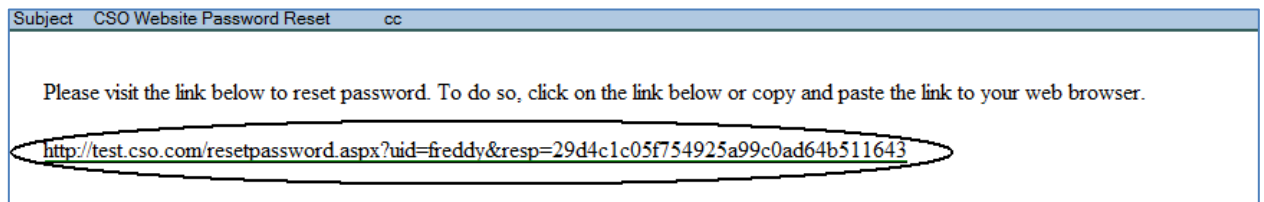
- If you do not remember your password, you can select 'Forgot your password?' from the main login page.
 - Enter your Username.
 - Click on Reset Password.



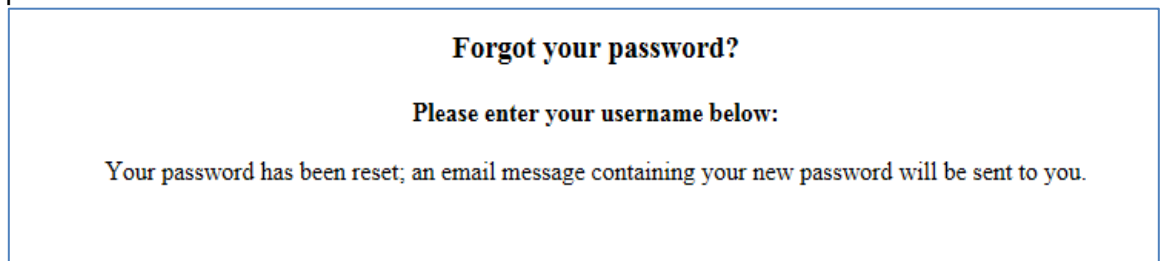
- A window will display indicating that an email has been sent to you.



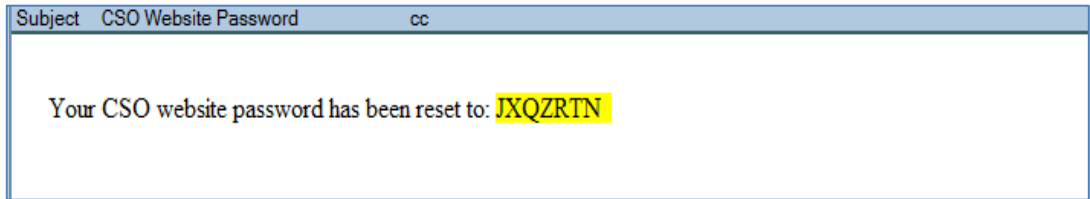
- This is a two-step process and both steps must be completed before your password will be reset.
 - **Step 1** - You will receive an email to validate your email address. Click on the link in the email to reset your password.



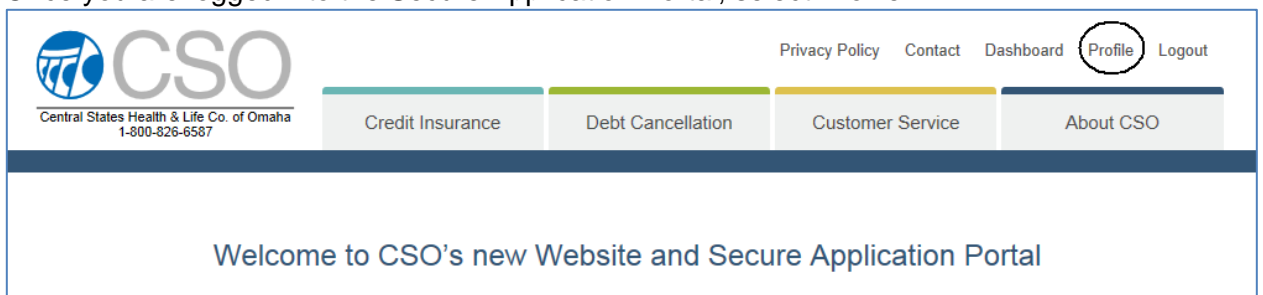
- The following window will display indicating that a second email containing your password has been sent.



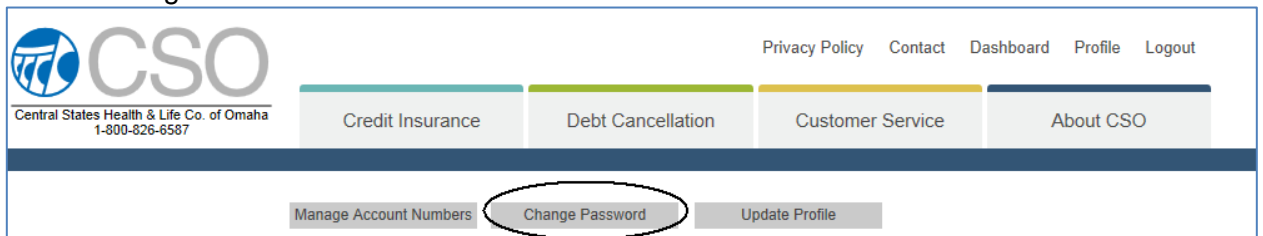
- **Step 2** – Another email will be sent containing your new password.
 - The new password can either be typed or copied into the password field on the Login page.



- Return to the CSO website (www.cso.com) and click on Login.
 - Enter your Username
 - Enter the temporary password from the email you received. The password is case sensitive.
 - Click Login.
- To Reset the Temporary Password
 - Once you are logged into the Secure Application Portal, select Profile.



- Select Change Password.



- Enter the **temporary** password in the Current Password field.
- Enter a New Password.
- Re-enter the New Password in the Verify Password field.
- Click Save.
- The next time you log in, you will use the new password you just created.

- **To Logout**

- To properly exit the Secure Application Portal, click on Logout at the upper right corner of the screen.

