### 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, the following applications will 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.

If you have any questions, feel free to call us at 1-800-826-6587.

# To Access the Secure Application Portal

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



#### • First Time Users

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

First Name:	Fred	
Last Name:	Flintstone	
E-Mail Address:	fred@anydealer.com	Activation link will be sent to this e-mail address
Account No:	1234567890	
State Abbr:	NE	
User Name:	freddy	
Password:	•••••	8 or more characters
Verify Password:	•••••	
	Register	

- 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.

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Central States Health & Life Co. of Omaha	Credit Insurance Debt Cancellation		Customer Service	About CSO				
	CSO Website Registration Confirmation							
Yo	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.								
into your email account								

Log

Following is a sample of the email you will receive.

	Ektron@cso.com	То	sfadmin@cso.com
	06/25/2014 02:32 PM	cc	
Carlo and		bcc	
		Subject	CSO Website Registration Confirmation
Please visit http://test.c	t the link below to confirm your registration. To do so, Click cso.com/activateuser.aspx?uid=freddy&acc=d38bbc58d9d	chere.or copy and 147bfb735a4482e	paste the link below to your web browser. 0 <u>b38f7</u>

- 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.

Activate Account:	
Username:	freddy
Activate Clear	d38bbc58d9d147bfb735a4482e0b38f7

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.

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Central States Health & Life Co. of Ornaha	Credit Insurance	Debt Cancellation	Customer Service	About CSO			
Welcome to the Central States Health & Life you have previously registered, you may	Co. of Omaha (CSO) website. The proceed to login. Otherwise, select	e information contained in this section t "New Users Click Here to Register	on of the website is secured and or r". If you have any questions, plea:	nly accessible by registered users. If se contact us at 1-800-826-6587			
	Vser: freddy Pwd:						
		Login					
		Forgot your password?					
	New	Users Click Here to Register					

 Once you are logged in, a list of applications available to you will be displayed on the Secure Application Portal.



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

<b>CSO</b>	These 3 options are avail from the Profile link.	able	Privacy Policy Contact	Dashboard Profile Logout
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$\square$	Manage Account Numbers Cha	nge Password U	pdate Profile	

### • 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	Add new record							
		User Name	Account No	Account No State Account Type Account Name				
×	Edit	ACCTTEST	5566778	ID	Debt Cancellation	ABC Motors		
×	Edit	ACCTTEST	9876543210	ТΧ	American Heritage	ABC Chevy		
×	<u>Edit</u>	AcctTest	1234567890	ΤХ	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.

<b>CSO</b>					Privacy Policy	Contact	Dashboard	Profile	Logou
Central States Health & Life Co. of Omaha	Credit Insurance		Debt Cancellation		n Customer Service		About CSO		6 <b>0</b>
Manage Account Numbers for: ACCTTEST									
+ Add new record User Name Accord	ount No	State	Account Type	Account N	lame				
Account No: 5544332 ← Enter State: tx ← Then Select Inser	er The Account Number and St ert	ate		1					

- 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.

Click on the X to remove an account number from the list. Manage Account				ccount Numbers for: A	CCTTEST	
+ Ad	d new rec	ord				
		User Name	Account No	State	Account Type	Account Name
$(\mathbf{x})$	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 0

Select Change Password. •

Manage Account Numbers	Change Password	Update Profile
ChangePassword		- C X
Current Passwor New Password: Verify Password:	rd:	8 or more characters
	Save	

- 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.

	×	
	Password Successfully Changed	
	Ok	
0	If the Verify Password does not ma	tch the New Password, a message will appear
	Passwords do not match	
	Ok	

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

Profile			×
First Name:	Account		
Last Name:	Test		
E-Mail Address:	sfadmin@cso.com		
	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.

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Welcome to CSO's new Website and Secure Application Portal								
Cancellation Quote								
Proof of Payoff Notice								
Business Submission Form								
QuikCalc Download								

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

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Welcome to CSO's new Website and Secure Application Portal								