How to Submit a Monthly Aggregate Request
REQUIREMENTS

1. What to Submit

Please submit the following:

1. Completed Aggregate Monthly Claims Report/Reimbursement Request

2. Paid Claims Summary including:

   a. Employee name
   b. Claimant name
   c. Provider name
   d. Dates of service
   e. Type of service
   f. Billed charges
   g. Amount paid
   h. Paid date
   i. Check number

3. Eligibility listing

Failure to submit any of the above documentation could result in a delay in the completion of the Aggregate audit.

2. When to Submit a Request

Things to know regarding timing of requests:

- The Policyholder must submit a Monthly Aggregate request within 20 days after the end of the month that a request is being made.
- In the first 90 days of the Policy period, you cannot make an initial request for reimbursement.

3. How to Submit a Request

Submit your claims electronically at: **: Berkley Secure File - Login (wrberkley.com)**

4. Minimum Monthly Aggregate Request

You cannot request less than $1,000 or the minimum amount stated in the Policy.

5. Reconciliation

At the end of the Policy period, the Policyholder must submit Proof of Loss showing the total of all Losses Paid during the Policy period. If the amount of covered losses paid by the Policyholder is greater than the Annual Aggregate Attachment Point, then we will pay the amount minus any amounts advanced, upon completion of the year-end audit. If after the completion of the Aggregate claim audit at policy year-end, we determine that the Aggregate amount reimbursable for the policy period in its entirety is less than the sum of any Aggregate Accommodation payments previously made, then we may, at our option:

1. Require the Policyholder to pay us back for the overpayment within 30 days after we notify the Policyholder in writing of the amount due, subject to a late payment charge of 10% per year; or
2. Reduce any subsequent Specific or Aggregate Stop Loss reimbursements by the amount of the overpayment.

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Send and Share Files with Berkley Secure File

You have been invited to send and share files safely with W. R. Berkley associates using this link:
https://Fileshare.WRBerkley.com

BEFORE YOU BEGIN

1. Google Chrome is the preferred web browser. Please use Chrome when accessing Secure File, **not Internet Explorer**.
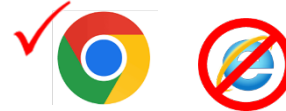
2. Berkley Secure File uses GoAnywhere's GoDrive solution.
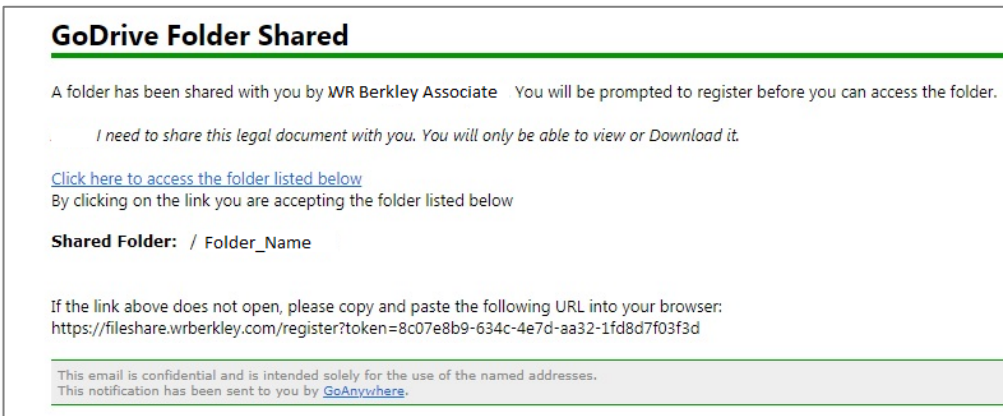   You may see these names used interchangeably in these instructions.

SETTING UP YOUR ACCOUNT

If this is your first time using Berkley Secure File, you will have to register and create an account.
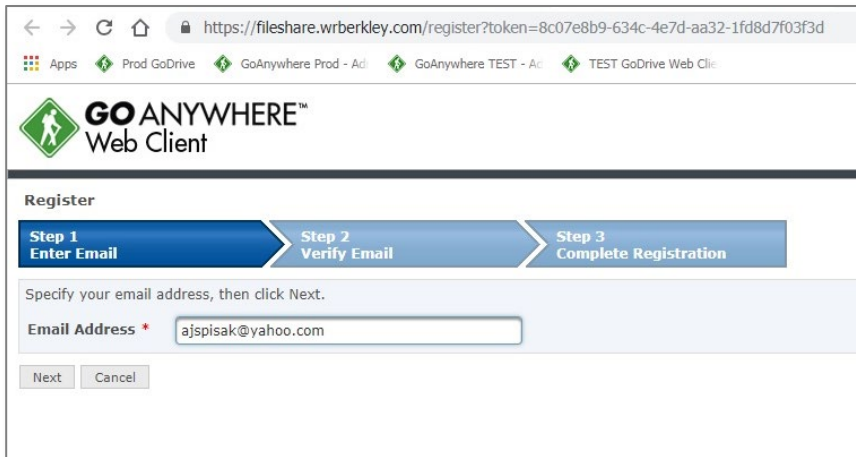
1.1.1. **Email Invitation** – You will receive an email similar to this:

GoDrive Folder Shared

A folder has been shared with you by WR Berkley Associate   You will be prompted to register before you can access the folder.

    I need to share this legal document with you. You will only be able to view or Download it.

Click here to access the folder listed below
By clicking on the link you are accepting the folder listed below

Shared Folder: / Folder_Name

If the link above does not open, please copy and paste the following URL into your browser:
https://fileshare.wrberkley.com/register?token=8c07e8b9-634c-4e7d-aa32-1fd8d7f03f3d

This email is confidential and is intended solely for the use of the named addresses.
This notification has been sent to you by GoAnywhere.

1.1.2. Click on the "Click Here to access the folder listed below." Your email invitation is only valid for 7 days. If you do not register within 7 days, the invitation will expire and your W. R. Berkley associate will have to resend a new one.

1.1.3. The email's "From" address will be the W.R. Berkley associate who invited you. All email replies will return to the associate.
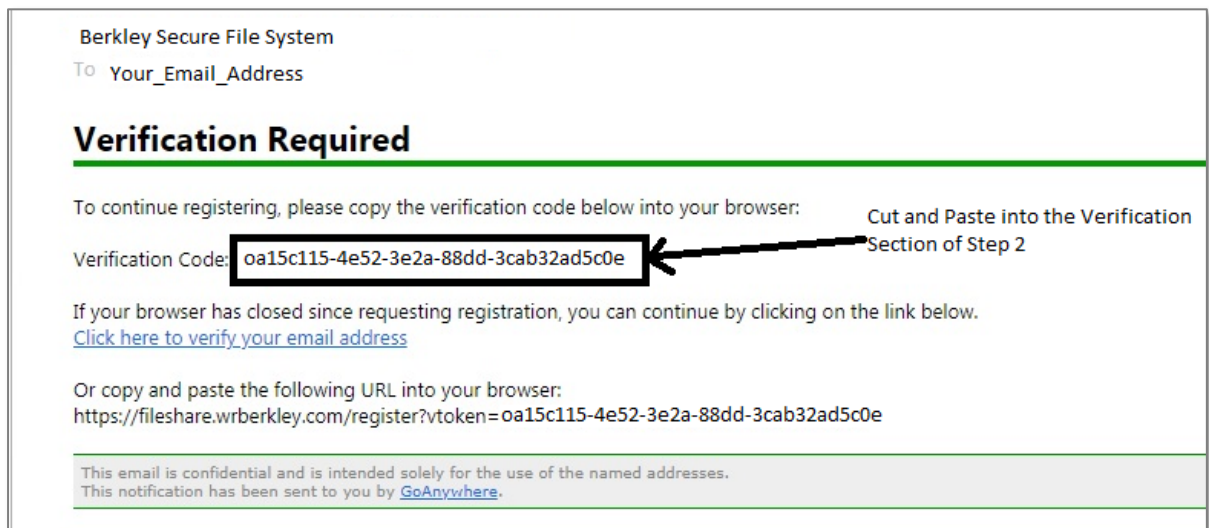
1.2. **Registering**

1.2.1. **STEP 1:** Enter the email address that was used to invite you and press "Next." You cannot use a different email address.
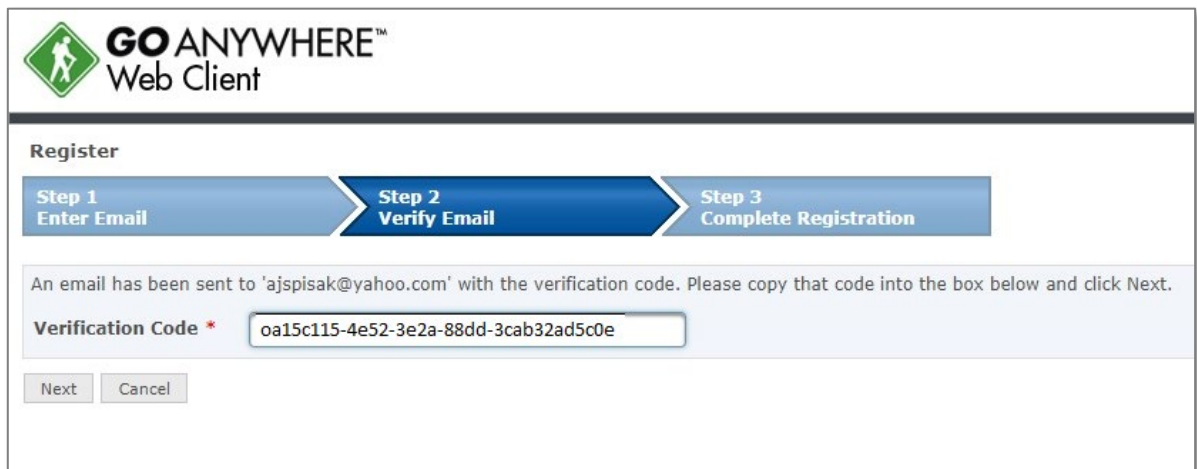

1.2.2. **STEP 2:** You will receive another email from W. R. Berkley Secure File containing a one-time verification code. Cut and paste the code into your registration screen and press "Next."

1.3.   **STEP 3:** Complete registration by providing all required information and then press "Submit."

1.4. Once you have registered, you can login to https://fileshare.wrberkley.com using the account information you created. You can also click on the link provided in your original email. Your W.R. Berkley associate will be notified that you have completed your registration.
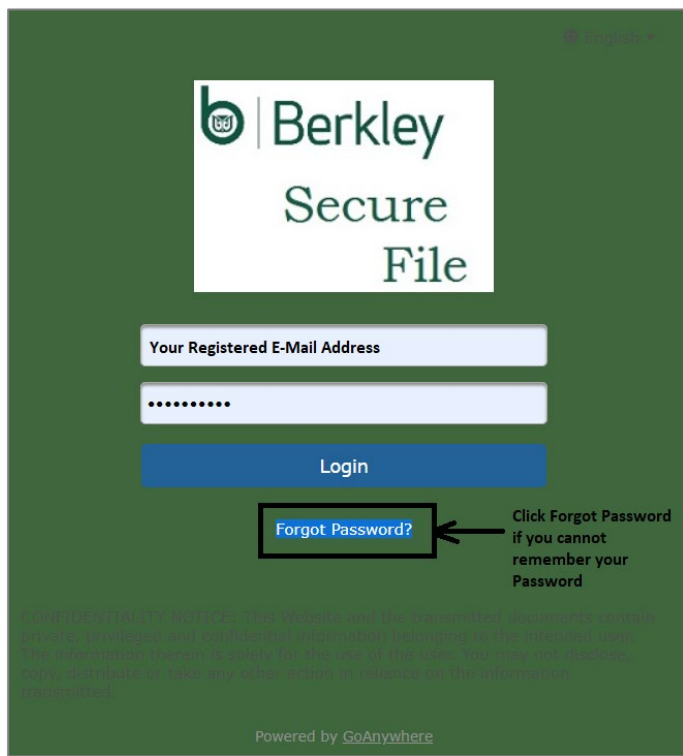
1.5. Privacy Notes

1.5.1.   None of the information entered is shared with anyone other than the W. R. Berkley Associate that invited you.

1.5.2.   All Files are subject to W. R. Berkley's confidentiality agreements. Upon logging in, you agree to the following:

CONFIDENTIALITY NOTICE: This Website and the transmitted documents contain private, privileged and confidential information belonging to the intended user and W. R. Berkley. The information therein is solely for the use of the user and W. R. Berkley.

1.5.3.   No files will remain in the system longer than 60 days. A new file pruning solution will be implemented and remove files that have not been modified within 60 days.

SENDING AND SHARING FILES

2. **Logging In**
   You will be prompted to enter your username and password, which you created during registration.

2.1. After logging in, you will see the GoAnywhere dashboard. Here you can update your Profile, View Activity Reports, Get Help, and use GoDrive. Select GoDrive to share files.

2.2. Password Note: If you enter your password incorrectly three consecutive times, your account will be locked. If you cannot use the Forgot Password Link, tell your W. R. Berkley associate that your account is locked, and your associate can unlock it.

3. **Berkley Secure File Actions**

3.1. Your Enabled Actions: The actions you are allowed to do depend on your assigned role.

3.1.1. Assigned Roles – Your assigned role was created when you were invited. Your role will govern your abilities within the solution.

3.1.1.1. Viewer – You can View and Download the file. Your account will not require a licensed account, and therefore is free to use.

3.1.1.2. Contributor – You can View, Download, Upload, and Add Comments to the shared item.

3.1.1.3. Editor – You can View, Download, Upload, Add Comments, Rename, Delete and Share the folder/items with other GoDrive users. You are not able to invite new users to file share.

3.1.1.4. Owner – You have full access to the shared item, including the ability to manage file locks and other users Shared Access levels.

3.1.2. Sharing – Shared Partners cannot invite new people to share files or folders. If the account already exists on the system, you can share with them. In other words, you cannot invite new W. R. Berkley Secure File participants.
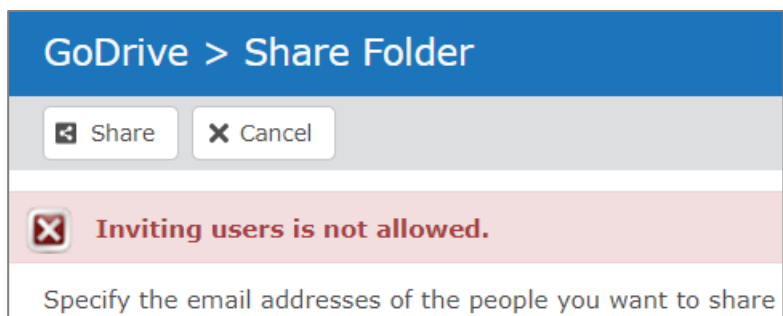

3.2. Downloading Files

3.2.1. Select the file, by either clicking on it or selecting the box in front. If the type of file is "Media Viewable (Picture, Video etc…) a new window will pop up. You can click the download button on the upper right portion of your web browser.

3.2.1.1.   At the bottom of the screen there will be a download button.

3.2.2. If selecting multiple files, the system will automatically ZIP all the files into one downloadable file. You will then have to extract these files on your computer.

3.3. Uploading Files

3.3.1. If you were invited with the role "Contributor" or any other Role than "Viewer," you will have the ability to upload files and share with your W. R. Berkley associate.

3.3.1.1.   You can Upload by either Dragging and Dropping files from your Windows Explorer (My Computer), or click on the "Upload" feature.
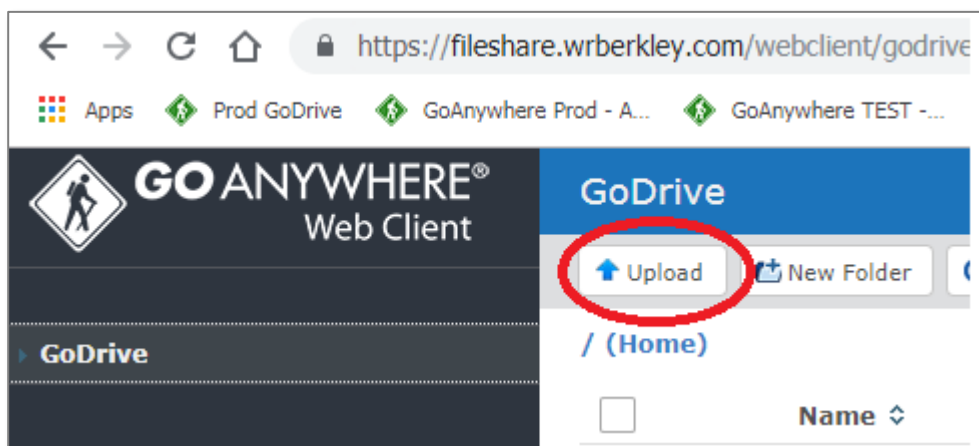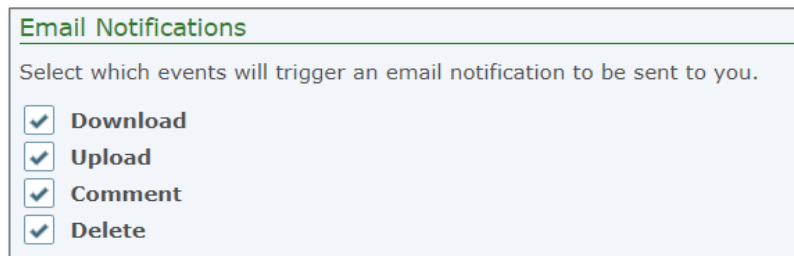

3.4. Creating Additional Subfolders

3.4.1. If you were invited with the role "Editor" or "Owner," you can create additional subfolders.

3.4.1.1.   Click "New Folder" and name the folder appropriately.

3.5. Sharing of Folders and Files

    3.5.1. If you were invited with the role "Editor" or "Owner," you will have the ability to share with others. As noted above, you can only share with currently enabled Berkley Secure File accounts. You will not be able to add someone new to the system. See note 3.1.2.

    3.5.2. You will have the option to assign the roles for the new share – See Sections 3.1.1

    3.5.3. Notifications: When sharing, besides the roles, you can also set the type of email notifications you would like to receive. These will be emailed from the Berkley Secure File solution.

        3.5.3.1. Place a checkmark, or remove the checkmark before sending the message based on what you would like to have for a notification:

4.   Appropriate Use

    4.1. As noted, all documents stored and available via the Berkley Secure File Solution are governed by the W. R. Berkley confidentiality agreements.

    4.2. Files stored on the system will be purged after 60 days of inactivity. If the file is changed or replaced, the 60-day timer will reset.