

## Activating Your Account

### 1. Activation Email

When first registered on the Broker Portal, you will receive an email requesting Activation of your account

Click the hyperlink to Activate your Portal account and set your password.  
The Activation email is valid for 10 days only. Please contact us if this has expired.

### 2. Set Your Password

When the 'activate your account' screen launches, enter the Password you wish to set for the Portal, then re-enter the Password to confirm. Click **Submit**.

**Note:** Passwords are case sensitive only

### 3. Enter log-in details

Upon confirmation of setting your password, the login screen will display. Log in with your username (located in your Activation email) and new password.

You can also reach the login screen via <https://portal.pacificindemnity.com.au>, or [www.pacificindemnity.com.au](http://www.pacificindemnity.com.au) and click the 'get a quote' button

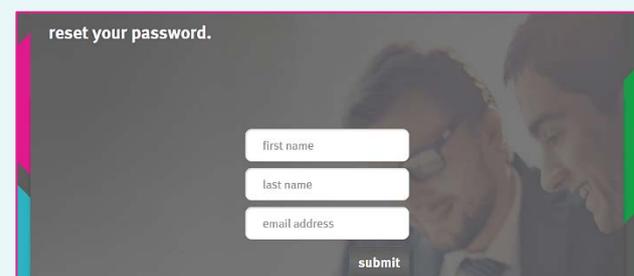
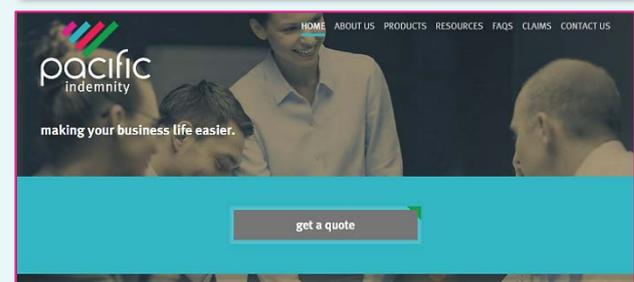
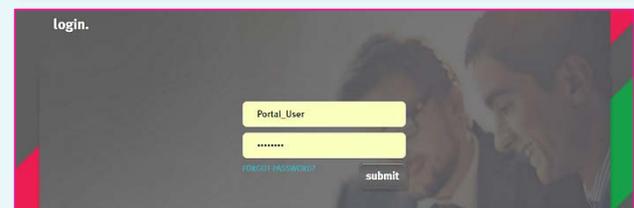
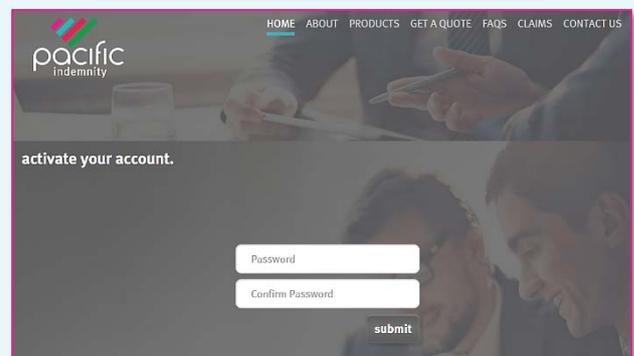
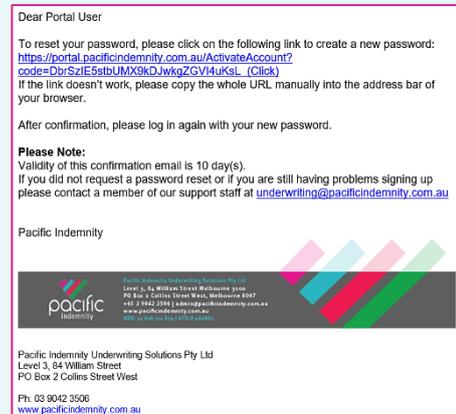
## Forgot Password?

### 1. Click 'Forgot Password?'

Enter your first name, last name and email address. Click the '**submit**'. You will receive a confirmation message on screen.

### 2. Activation Email

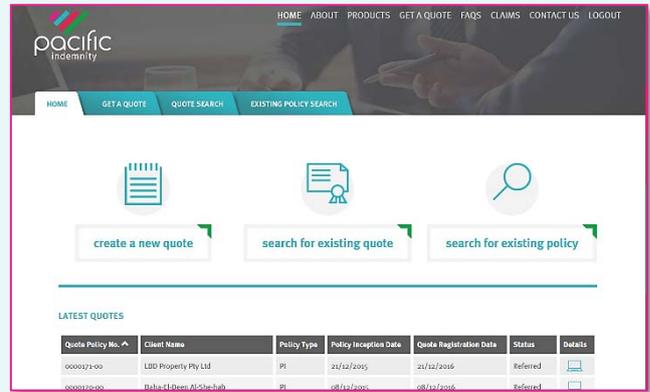
You will receive an activation email to reset your password. Please follow the 'Activating Your Account' steps above.



## The Portal Home screen

This is the Home screen. You can:

- Create a new quote
- Search existing Quotes
- Search existing Policies
- See a list of Latest Quotes



## Create a New Quote

- All the proposal information is captured in the one screen
- A floating Quote Summary 'floats' with you on screen as you enter the data, showing the premium as you input the data
- There are over 400 Professional Services listed, of which approx. 250 will auto-rate

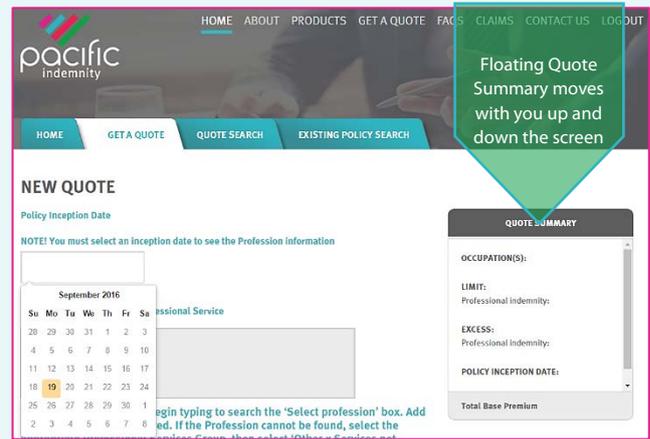


### Information Collected

#### Policy Inception Date

*Click to open the calendar to select the dates*

*It is important to have this updated to the correct date at the time of binding cover*

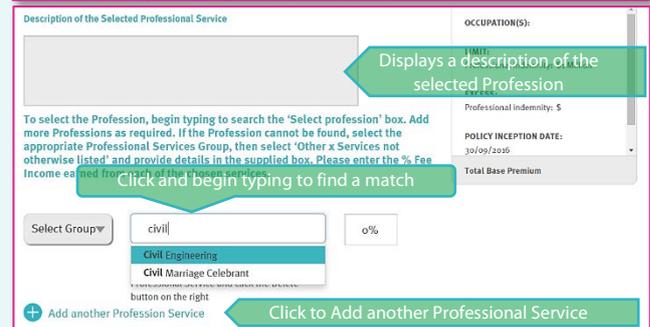


#### Find a Professional Service

*Begin typing to find a match & enter the applicable percentages*

*Click to Add more Professional Services*

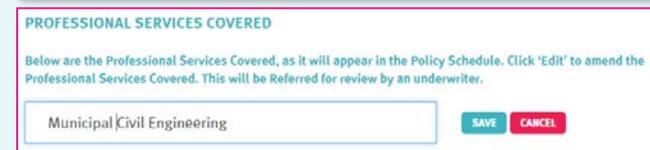
*If you would prefer to search within a group of related Professions, you can search the 'Select Group' to refine your search results*



#### Editable Professional Services Covered

*You may amend the default description of the Professional Services Covered.*

*Hover your mouse near the field to show the 'Edit' button, click 'Edit', make your changes & click 'Save' This will Refer to an Underwriter for review and approval*



## Addendum Questions (if applicable)

Specific questions will appear that are applicable to the selected professions

The example shown is for Engineering and Construction professions

## Insured Name

Please enter your client's full Legal Name here. If additional or trading names exist, you have opportunity prior to binding cover

## Gross Professional Fees

Enter the fees earned for the last 12 months or an estimate if operating for less than 12 months

## Fee Income by State/Territory

Collected for stamp duty purposes.

Tick if your client is exempt and supply supporting exemption certificate

## Professional Indemnity Limit

Slide the ball along the line to adjust the limit

## Professional Indemnity Excess

Slide the ball to adjust the excess.

A higher than standard will attract a discount

A lower excess will Refer

## Broker Commission

Adjusting the commission will vary the premium

## Public (Broadform) Liability cover

Applicable questions will only appear if answered Yes

- Number of Staff
- Office Locations
- Public Liability Limit

## Claims and Circumstances

Click  to proceed to the Quote Summary screen

**PROFESSIONAL SERVICES COVERED**

Below are the Professional Services Covered, as it will appear in the Policy Schedule. Click 'Edit' to amend the Professional Services Covered. This will be reviewed for review by an underwriter.

**Civil Engineering** Edit

Please answer the specific Professional Services questions below.

What % of total fees apply to Pollution Control Systems Design?

What % of total fees apply to services provided to utilities companies e.g. Water, Gas, Electricity and/or Telecommunications carriers?

What % of total fees apply to Marine Survey?

What % of total fees apply to Bridges?

What % of total fees apply to Tunnels?

What % of total fees apply to Dams?

What % of total fees apply to Mines?

What % of total fees apply to Oil and Pipelines?

What % of total fees apply to Refineries?

What % of total fees apply to Land Reclamation?

What % of total fees apply to Mechanical Plant and Bulk Handling Equipment?

What % of total fees apply to Fair and Exhibition Grounds?

What % of total fees apply to Subsurface Surveys, Ground and Soil Testing?

Are you or have you or any Parent, Subsidiary or other related Entity either (i) engaged in, or (ii) have or had a controlling share of any Entity engaged in Actual construction or fabrication?  Yes  No

Real estate development?  Yes  No

The manufacture, sale or distribution of any product or process or patented production process?  Yes  No

**QUOTE SUMMARY**

**OCCUPATION(S):**  
Civil Engineering

**LIMIT:**  
Professional Indemnity: \$1 Million

**EXCESS:**  
Professional Indemnity: \$

**POLICY INCEPTION DATE:**

Total Base Premium

**Insured Name** ?

Civil Project Management Pty Ltd

What are your gross professional fees in the last 12 months? ?

\$450,000.00

Please provide a % breakdown of fee income by state and/or territory.

STATE/TERRITORY	PERCENTAGE	SD EXEMPT?
ACT	<input type="text" value="0%"/>	<input type="checkbox"/>
NSW	<input type="text" value="0%"/>	<input type="checkbox"/>
NT	<input type="text" value="0%"/>	<input type="checkbox"/>
OVS	<input type="text" value="0%"/>	<input type="checkbox"/>
QLD	<input type="text" value="0%"/>	<input type="checkbox"/>
SA	<input type="text" value="50%"/>	<input type="checkbox"/>
TAS	<input type="text" value="50%"/>	<input checked="" type="checkbox"/>
VIC	<input type="text" value="0%"/>	<input type="checkbox"/>
WA	<input type="text" value="0%"/>	<input type="checkbox"/>
Total	100%	

Please attach a stamp duty exemption certificate noting insurance contracts to receive exemption.

Attached Stamp Duty exempt doc in UPM2 UAT.docx ✕

**QUOTE SUMMARY**

**OCCUPATION(S):**  
Civil Engineering  
Project Management (Construction Projects)

**LIMIT:**  
Professional Indemnity: \$1 Million

**EXCESS:**  
Professional Indemnity: \$2500

Total Base Premium \$2,949.00

Click to notify exemption and attach exemption certificate

What do you need your Professional indemnity limit to be? (Slide the ball along the line to adjust the PI limit)

1000000

PI Excess (Slide the ball along the line to adjust the Excess. A higher excess will attract a premium discount)

2500

Slide to adjust the excess - a higher excess will attract a discount

Broker Commission (Slide the ball along the line to adjust the premium)

20%

Would you like to be covered for public liability? ?

Yes  No

**Claims and Circumstances**

During the past 5 years: Have any claims been made, losses suffered, or negligence alleged against any entity or individual to be insured by this insurance; or have any circumstances which may give rise to a claim against or loss suffered by any of these been notified to insurers?  Yes  No

During the past 5 years: Are there any circumstances not already notified to the insurers which may give rise to a claim against or loss suffered by any entity or individual to be insured by this insurance?  Yes  No

During the past 5 years: Are there any claims against previous practices which may give rise to a claim against or loss suffered by any entity or individual to be insured by this insurance?  Yes  No

During the past 5 years: Has any principal or staff member ever been subject to disciplinary proceedings for professional misconduct?  Yes  No

During the past 5 years: Has an insurer ever declined a proposal from your client, declined to renew, cancelled a policy or imposed special terms?  Yes  No

Exit without saving Review your quote

## Quote Summary Screen

This screen summarises your quote in an easy to read page. From here you can:

**Edit quote**

Return to the previous screen to edit the details

**Email summary**

Email an Indicative Quote summary to your email address

**Next**

Go to the next screen for a formal quote and ability to Bind Cover

**Print/Download Proposal**

Click to launch a new window with a PDF record of the portal proposal answers

**Note:** The Print/Download Proposal button will launch a new window. Please allow pop-ups for this window.

Click here to navigate between pages

Policy Number: 0002567-00

Policy Number

	Total(\$)	Professional Indemnity(\$)	Public liability(\$)
PREMIUM	2,949.00	2,949.00	
GST	294.90	294.90	
STAMP DUTY	340.61	340.61	
POLICY FEE (INCL GST)	100.00	100.00	
TOTAL PREMIUM	3,694.51	3,694.51	
BROKER COMMISSION (incl GST)	58.98	58.98	
BROKER COMMISSION GST	58.98	58.98	
PREMIUM PAYABLE	3,745.73	3,745.73	

PROFESSIONAL INDEMNITY COVER: \$1,000,000

PROFESSIONAL INDEMNITY EXCESS: \$2,000

TO BE DEVELOPED - View alternative limits and excesses via Drop Down selection

PUBLIC LIABILITY COVER:

PUBLIC LIABILITY EXCESS:

POLICY INCEPTION DATE & TIME: 30/09/2016

OCCUPATION(S): CIVIL ENGINEERING, PROJECT MANAGEMENT (CONSTRUCTION PROJECTS)

BUSINESS OPERATES IN: SA 50 % TAS 50 %

Click icon to view Special Conditions

APPLICABLE ENDORSEMENTS

Title: PROJECT/CONSTRUCTION MANAGERS

Wording link

Print/Download Proposal will launch a new window. Please allow pop-ups for this website.

## Portal Proposal Form

This is a record of the answers entered in the Portal proposal page that can be printed and/or saved.

The Address details will appear following entry in the **Quote & Bind** screen, where this information is collected

Pacific Indemnity

Pacific Indemnity Proposal form

Your Quotation has been provided based on the answers entered in to the Pacific Indemnity Broker Portal Proposal Form, completed on 19/09/2016

Please review, make changes as required, sign and date.

Insured Name: Civil Project Management Pty Ltd

Address: .

Selected Policy Inception Date (This has been selected for quotation purposes): 30/09/2016

Preferred Policy Inception Date (if different to above):

Professional Services Covered: Civil Engineering, Project Management (Construction Projects)

Selected Profession(s) Fee Income %

Civil Engineering	80%
Project Management (Construction Projects)	20%
Total	100%

A declaration statement has been provided for you to gain your client's sign-off on the information provided

You are **not** required to send this completed form to Pacific Indemnity

Declaration

I/We hereby declare that:

My/Our attention has been drawn to the Important Notice accompanying this Proposal form and further I/we have read these notices carefully and acknowledge my/our understanding of their content by my/our signature/s below.

The above statements are true, and I/we have not suppressed or mis-stated any facts and should any information given by me/us after between the date of this Proposal form and the inception date of the insurance to which this Proposal relates I/we shall give immediately notice thereof.

I/we agree that, by submitting this form, the personal information I/we provide to Pacific Indemnity Underwriting Solutions Pty Ltd in this form or otherwise may be collected, held, used and disclosed in the manner set out in the Pacific Indemnity Privacy Policy including for processing this application and providing me/us with cover.

I/we also confirm that the undersigned is/are authorised to act for and on behalf of all persons who may be entitled to indemnity under any policy which may be issued pursuant to this Proposal form and I/we complete this Proposal form on their behalf.

To be signed by the Chairman/President/Managing Partner/Managing Director/Principal of the association/partnership/company/ practice/business.

Name: Title:

Signature: Date:

## Quote & Bind Screen

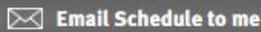
Complete your client's details, including any trading or additional names

### Mandatory fields\*:

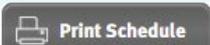
Legal name of Insured  
(pre-filled from previous screens)

Address

Begin typing the suburb and select from the list to populate the Postcode and State fields



Email the quote to your Inbox



Click to launch the quote in a new window

By checking this box you attest to the declaration statement (click to view a copy)



The **Confirm Bind Cover** button becomes active when you have read and ticked the box to confirm you agree to the **Declaration Statement**

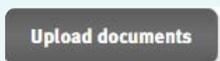
A confirmation window pops-up to confirm the cover is bound and an email containing the policy documents has been sent to your email address.

## Refer to Underwriter

If you would like to Refer your quote to an underwriter to review the automatically generated terms, or have additional information

e.g. a CV/Resume, company profile, contract details etc, you can utilise the function available in the **Quote & Bind** screen

Enter **Additional comments** in the box provided with the message or information you would like the Underwriter to consider



Click to Upload any supporting documents, e.g. CV/Resume, Company Profile, Contract Details, Existing Insurer's schedule, Completed Proposal form, etc up to 10MB in file size



Click to Refer the risk to an Underwriter for review

## Referred Quotes

When a quote requires referral to an underwriter, the following **Referral Details** screen will display  
Complete the Insured's details, including any trading or additional names

### Mandatory fields\*:

#### Legal name of Insured

*Pre-filled from previous screens*

#### Address

#### Additional Comments

*Provide any details that may assist with assessment of the Referral*

Edit quote

Return to the previous screen to edit the details

Upload documents

Click to Upload Documents that could assist with assessment of the risk up to 10MB in file size

E.g. CV/Resume, Company Profile, Claim details, Risk Management procedures, completed proposal form, expiring schedule/details etc

Submit Referral Details

Click to submit the Referral for review

You will receive the following confirmation that your Referral has been successfully submitted.

An underwriter will assess and provide a response within 24 hours, on the next business day

Your submission will have a **'Referred'** status

LATEST QUOTES						
Quote Policy No. ^	Client Name	Policy Type	Policy Inception Date	Quote Registration Date	Status	Details
0002567-00	Civil Project Management Pty Ltd	PI	30/09/2016	30/09/2017	Referred	

## Approved Quotes

When a Referred quote has been approved and quoted, the Status of quote will change to **'Quoted'**.  
The underwriter may also issue the quote to you via email.

LATEST QUOTES						
Quote Policy No. ^	Client Name	Policy Type	Policy Inception Date	Quote Registration Date	Status	Details
0002567-00	Civil Project Management Pty Ltd	PI	30/09/2016	30/09/2017	Quoted	



Click the Details icon to open the proposal page

To view the Quote Summary you have two options.

GET A QUOTE → SUMMARY → QUOTE & BIND

Click **SUMMARY** at the top left of the proposal screen

OR

Review your quote

Scroll to the bottom of the page and click **Review your quote** button



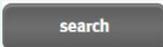
## Search for existing quote

Search Parameters include:

- Quote number
- Insured Name
- Created by = the broker who created the quote
- Quote Registration Date - from and to

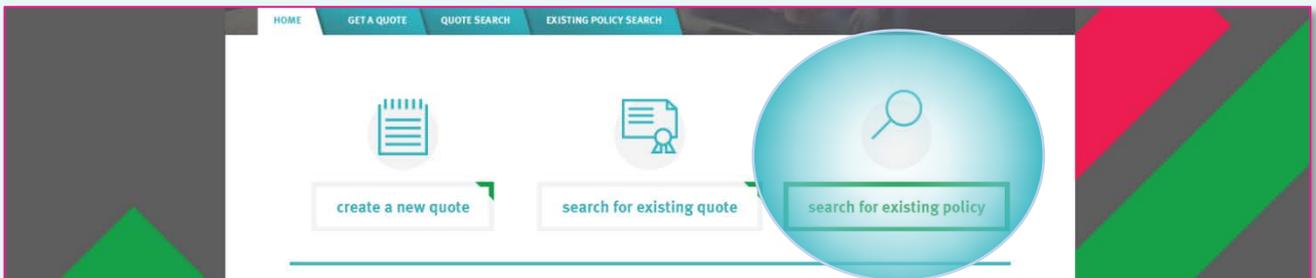
OR leave blank to see all

Click



SEARCH RESULTS

Quote Policy No.	Insured Name	Policy Type	Policy Inception Date	Quote Registration Date	Created by	Status
0000607-00	Plan about Town	PI/PL	11/02/2016	11/02/2016	Test Brokerage	Quoted <a href="#">link</a>
0000513-00	ElectMech Engineering Pty Ltd	PI/PL	01/02/2016	01/02/2016	Test Brokerage	Quoted <a href="#">link</a>
0000442-00	OH&S Guru	PI/PL	21/01/2016	19/01/2016	Test Brokerage	Quoted <a href="#">link</a>
0000407-00	People's Welfare Association Inc	PI/PL	01/02/2016	15/01/2016	Test Brokerage	Expired Quote <a href="#">link</a>
0000404-00	Test Insured Pty Ltd	PI/PL	14/01/2016	14/01/2016	Test Brokerage	Quoted <a href="#">link</a>



## Search for existing policy

Use this to search for Active (bound) Policies

Search Parameters include:

- Quote number
- Insured Name
- Created by = the broker who created the quote
- Inception Date - from and to

OR leave blank to see all

Click

