Broker Portal

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.

Dear Portal User

We are pleased to provide you an account for the Pacific Indemnity Broker Portal.

Your username is Portal_User. Please click on the following link to verify your account:
https://portal.pacificindemnity.com.au/ActivateAccount?code=w9q0lh1i4ppFNLXrXiesWPSgzYQWHd (Click)
If the link doesn't work, please copy the whole URL manually into the address bar of your browser.

After confirmation, please log in again with your new password.

Please Note:
Validity of this confirmation email is 10 day(s).
If you are still having problems signing up please contact a member of our support staff at underwriting@pacificindemnity.com.au

Pacific Indemnity

Pacific Indemnity Underwriting Solutions Pty Ltd
Level 3, 84 William Street
PO Box 2 Collins Street West

Ph: 03 9042 3506
www.pacificindemnity.com.au

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 and click the '**get a quote**' button
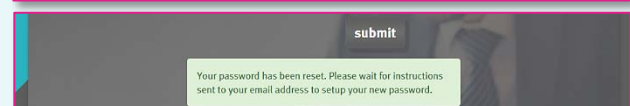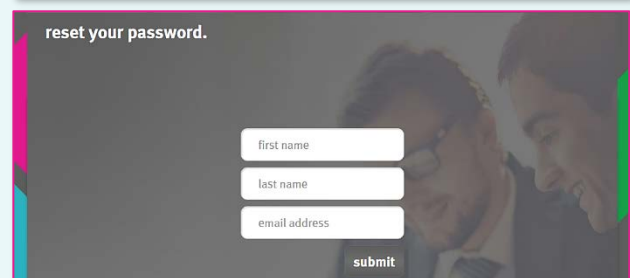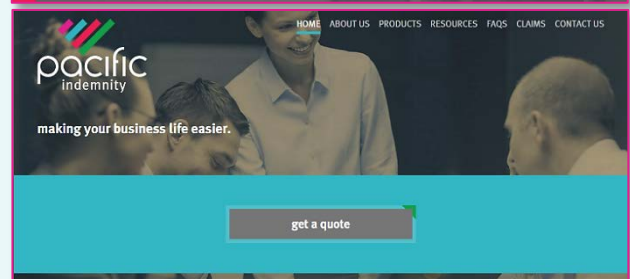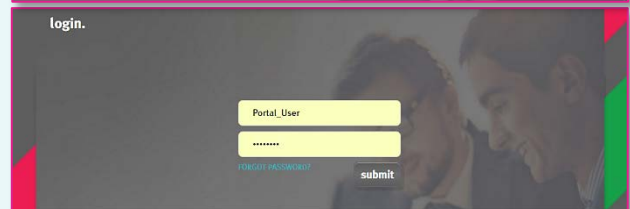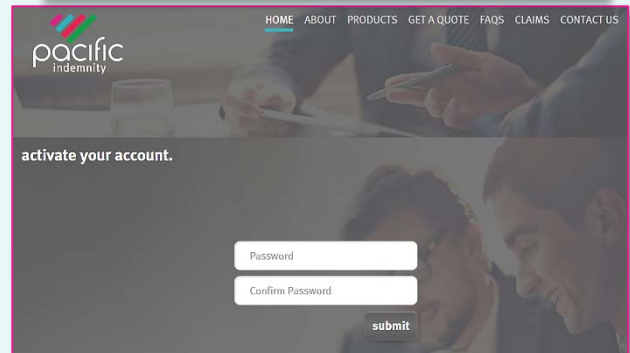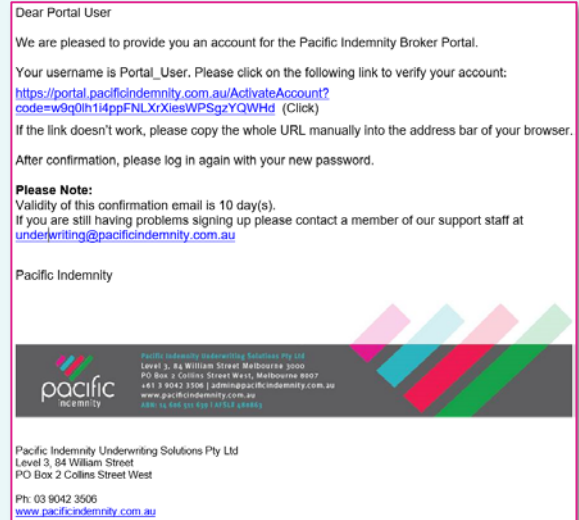
Forgot Password?

1. Click 'Forgot Password?'

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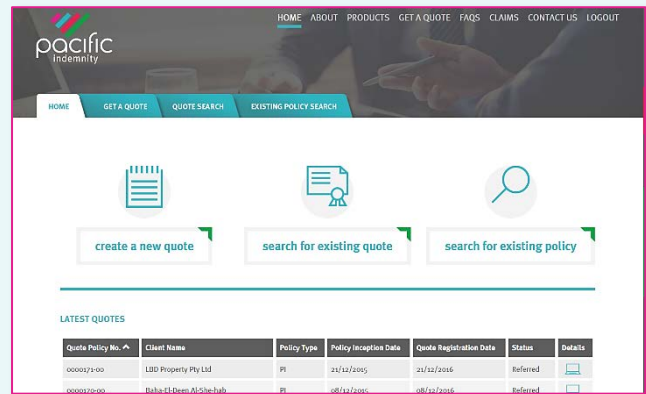
2. Activation Email

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
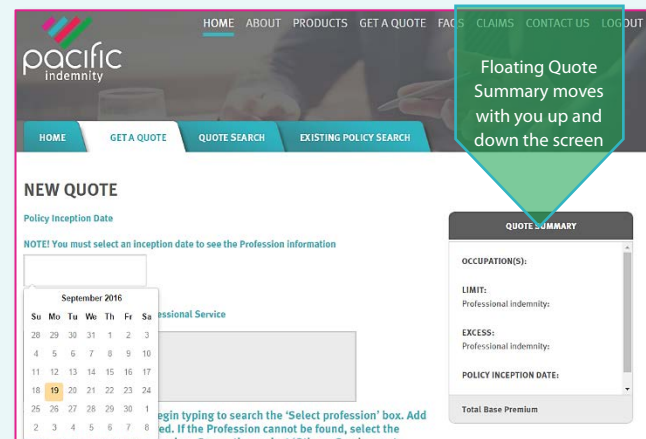- There are over 400 Professional Services listed, of which approx. 250 will auto-rate
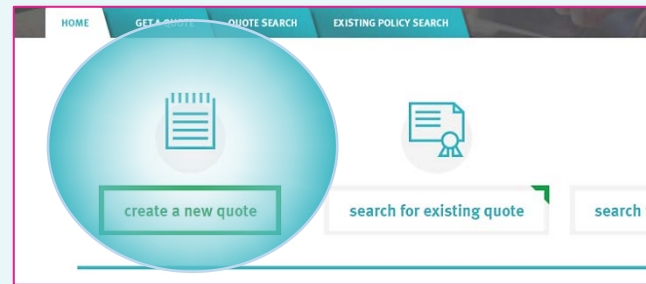
Information Collected

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*

Floating Quote Summary moves with you up and down the screen

Find a Professional Service
Begin typing to find a match & enter the applicable %'s
Click ⊕ to Add more Professional Services

To search within a group of related Professions, select a group in 'Select Group' to refine your search results

Displays a description of the selected Profession

Click and begin typing to find a match

Click to Add another Professional Service
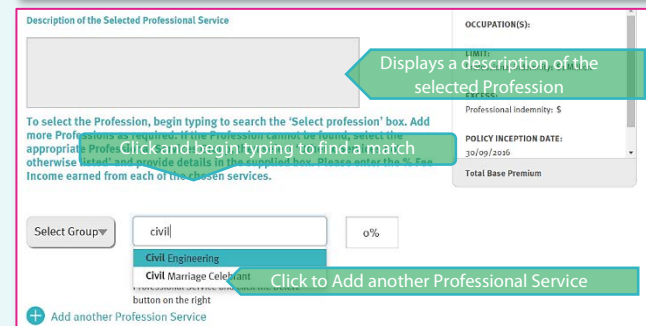
Editable Professional Services Covered
To amend the default description of the Professional Services Covered, hover your mouse near the field to show the 'Edit' button, click 'Edit', make your changes & click 'Save'

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

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 Referred for review by an underwriter.

Civil Engineering [EDIT]

Please answer the specific Professional Services questions below.

Question	Answer
What % of total fees apply to Pollution Control Systems Design?	0%
What % of total fees apply to services provided to Utilities companies e.g. Water, Gas, Electricity and/or Telecommunication carriers?	0%
What % of total fees apply to Marine Survey?	0%
What % of total fees apply to Bridges?	0%
What % of total fees apply to Tunnels?	0%
What % of total fees apply to Dams?	0%
What % of total fees apply to Mines?	0%
What % of total fees apply to Oil and Pipelines?	0%
What % of total fees apply to Refineries?	0%
What % of total fees apply to Land Reclamation?	0%
What % of total fees apply to Mechanical Plant and Bulk Handling Equipment?	0%
What % of total fees apply to Fair and Exhibition Grounds?	0%
What % of total fees apply to Subsurface Surveys, Ground and Soil Testing?	0%

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

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

Insured Name (?)

Civil Project Management Pty Ltd

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

$450,000.00

Gross Professional Fees

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

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

STATE/TERRITORY	PERCENTAGE	$D EXEMPT?
ACT	0%	☐
NSW	0%	☐
NT	0%	☐
OVS	0%	☐
QLD	0%	☐
SA	50%	☐
TAS	50%	☑ [BROWSE]

Fee Income by State/Territory
Collected for stamp duty purposes.
Tick if your client is exempt and supply supporting exemption certificate

> Click to notify exemption and attach exemption certificate

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

Attached Stamp Duty exempt doc in UPM2 UAT.docx ✕

VIC	0%	☐
WA	0%	☐
Total	100%	

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

Professional Indemnity Limit
Slide the ball to adjust the limit

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

1000000
●─────────────

Professional Indemnity Excess
Slide the ball to adjust the excess.
*A **higher** than standard will attract a discount*
*A **lower** excess will Refer*

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
Adjusting the commission will vary the premium

Broker Commission (Slide the ball along the line to adjust the Commission. A lower rate will reduce the premium)

20%
──────────●───

Would you like to be covered for public liability? (?)
○ Yes ● No

Public (Broadform) Liability cover
Applicable questions will only appear if answered Yes
- *Number of Staff*
- *Office Locations*
- *Public Liability Limit*

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

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

LIMIT:
Professional indemnity: $1 Million

EXCESS:
Professional indemnity: $2500

Total Base Premium $2,949.00

Claims and Circumstances

Click [Review your quote] *to proceed to the **Quote Summary** screen*

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

ⓘ **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

To be Developed – View alternative limits and excesses via Drop Down selection

Click icon to view Special Conditions

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

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*

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 Schedule to me — Email the quote to your Inbox

Print Schedule — Click to launch the quote in a new window

Print/Download Proposal — Click to launch a new window with a PDF record of the portal Proposal answers with a PDF record of the portal proposal answers

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

Confirm Bind Cover — 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 will be 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
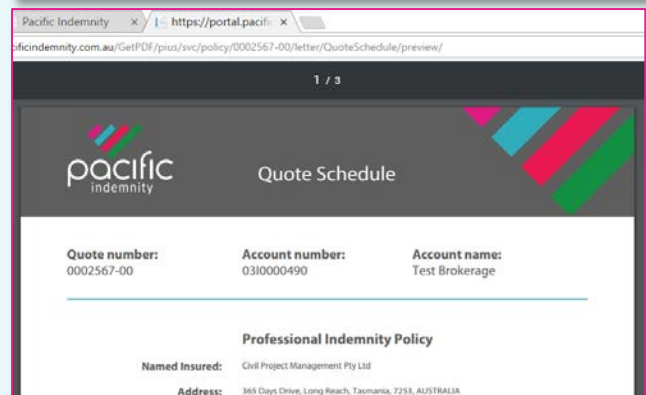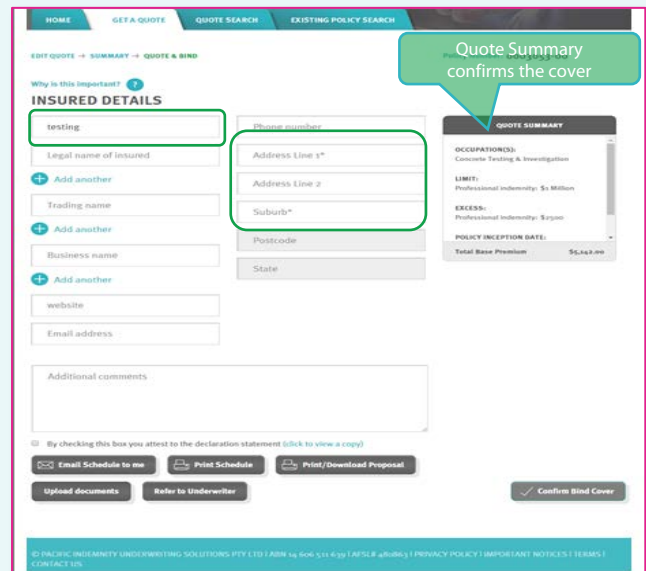
Enter **Additional comments** in the box provided with the message or information you would like the Underwriter to consider
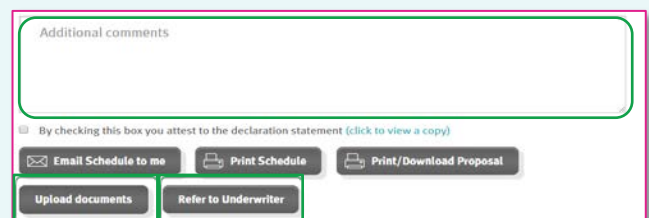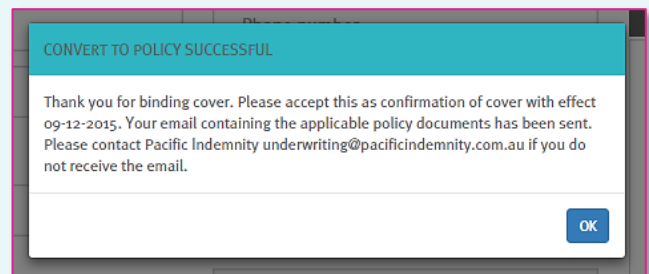
Upload documents — Click to Upload any supporting documents, e.g. CV/Resume, Company Profile, Contract Details, Existing Insurer's schedule, Completed Proposal form, etc up to 10MB in file size

Refer to Underwriter — 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

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.

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
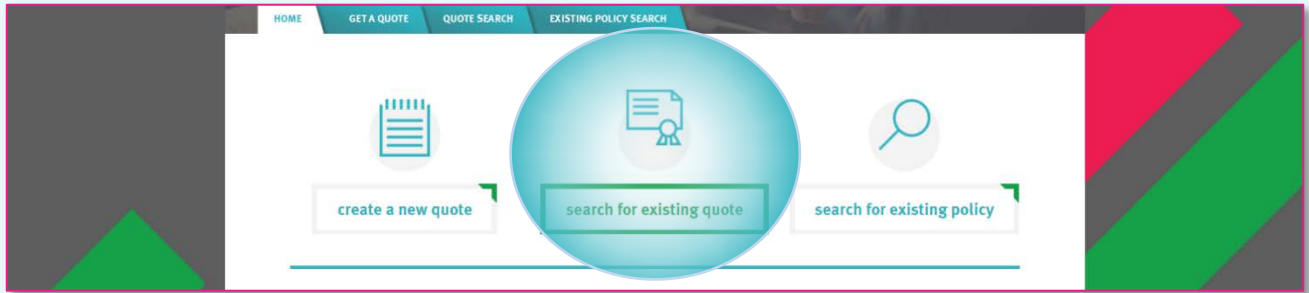
To view the Quote Summary you have two options.

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
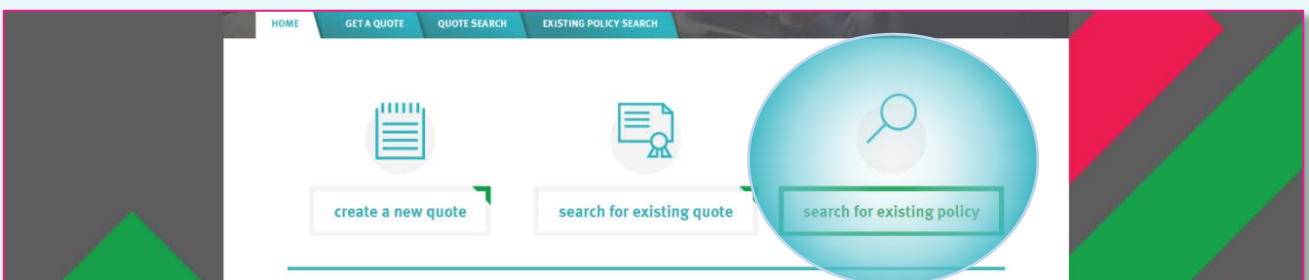
Search Parameters include:

- 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

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
0000513-00	ElectMech Engineering Pty Ltd	PI/PL	01/02/2016	01/02/2016	Test Brokerage	Quoted
0000442-00	OH&S Guru	PI/PL	21/01/2016	19/01/2016	Test Brokerage	Quoted
0000407-00	People's Welfare Association Inc	PI/PL	01/02/2016	15/01/2016	Test Brokerage	Expired Quote
0000404-00	Test Insured Pty Ltd	PI/PL	14/01/2016	14/01/2016	Test Brokerage	Quoted

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