

Welcome to the Pacific Indemnity Broker Portal

What's in this guide?

How does it work?

- Brief diagrams of the processes of getting an **Auto Quote, Referred Quotes, Send Link to Client, Binding Cover**

Who can I contact?

How to Access the Portal

- Activating Your Account
- Setting your password
- Accessing the Portal
- Resetting Your Password

New Business Quotes

- There are over 400 Professional Services listed, of which approx. 250 will auto-rate
- Get instant indications of price
- Edit the Professional Services Covered
- NSW Small Business Insurance Duty Exemption Declaration question
- Broadform Liability Cover

Send a link to your client

- Your client can review the detail in the proposal form and submit their confirmation of answers back to you before you submit it to us

What should I do if I get an Error Message?

- Try to refresh your screen, log out and log - in again in the case that your session has timed out

Renewal Quotes

- Expiring terms based on previously disclosed information are released to the Portal, and can be bound subject to there being no material change to the risk and subject to qualifying criteria

Quote Summary Screen

- A summary of your quote, what you can see and do in this screen

Print/Download Proposal

- Save or print a copy of the proposal answers in a PDF file

Bind Cover

- Immediately receive your Policy Documents and Certificate of Currency

Refer or Message the Underwriter

- For your Renewal Transfer risks, or an account you are trying to win, or any other reason, you can type a message, upload documents and 'Refer to Underwriter' to review the automatically produced quote

Referred Quotes

- Receive a response to your Referred quotes within 24 hours (of the next business day)

Search your existing Quotes and Policies

- All quotes and policies linked to your brokerage are visible on the Portal

Binding Cover

Review Inception Date & Cover

- SUMMARY and QUOTE & BIND links are not active if the inception date is incorrect/invalid i.e. must be equal to or greater than today's date

- Update cover options



Quote Summary Screen to Quote & Bind screen

Proceed via Quote Summary

↓ and/or

Jump directly to Quote & Bind screen



Click the Declaration Statement & Confirm Bind Cover

- Quote Summary shows the cover being bound

- Click to attest to the Declaration Statement

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

- Click
- Immediately receive the Policy Documents via email

Who can I contact?

- ▶ To get help filling in the proposal – please phone or email your underwriting contact
- ▶ If you receive an error - please email admin@pacificindemnity.com.au and cc your underwriting contact with details of the action you were performing and any screen shots would greatly assist with resolving the problem

Our contact details are:

Who	Title	Call	Email
Sharmella Perera	Systems & Administration	0401 035 687	sharmella.perera@pacificindemnity.com.au
Steven Duckworth	Business Development	0431 796 953	steven.duckworth@pacificindemnity.com.au
Andrea Skan	Senior Underwriter	0419 237 270	andrea.skan@pacificindemnity.com.au
Michelle Imlach	Senior Underwriter	0402 240 098	michelle.imlach@pacificindemnity.com.au
Robert Beaton	Senior Underwriter	0401 731 272	robert.beaton@pacificindemnity.com.au
Simone Oakman	Senior Underwriter	0431 618 869	simone.oakman@pacificindemnity.com.au
Jun Acance	Director	0401 712 017	jun.acance@pacificindemnity.com.au
Edward Rawnsley	Business Development Director	0432 356 554	edward.rawnsley@pacificindemnity.com.au
Lauren Sephton	Accounts & Administration	0481 158 342	lauren.sephton@pacificindemnity.com.au

How to Access the Portal

- **Activating Your Account**

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.

- **Setting 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

The screen refreshes to show the login screen

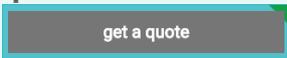
Enter login details

Upon confirmation of setting your password, the login screen will display.

Log in with your username (located in your Activation email) and new password.

- **Accessing the Portal**

The Login screen can be reached via <https://portal.pacificindemnity.com.au>, or www.pacificindemnity.com.au and click the 'get a quote' button

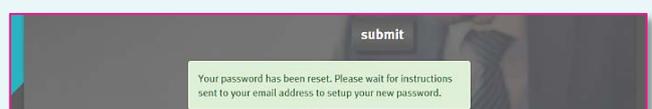
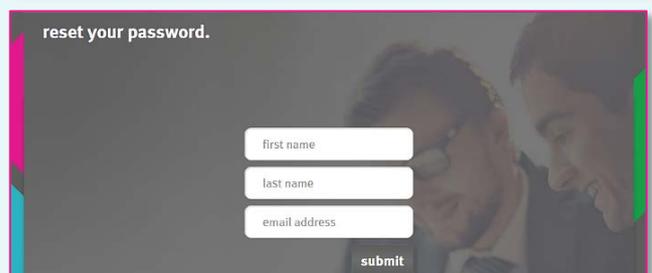
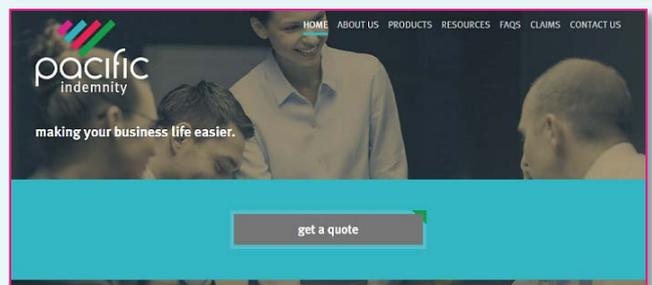
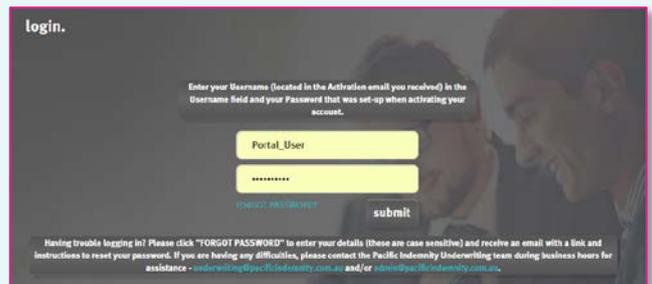
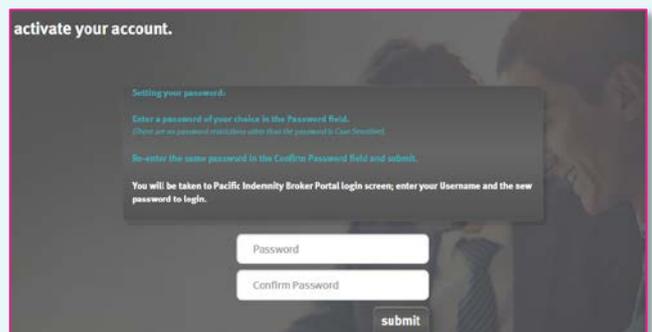
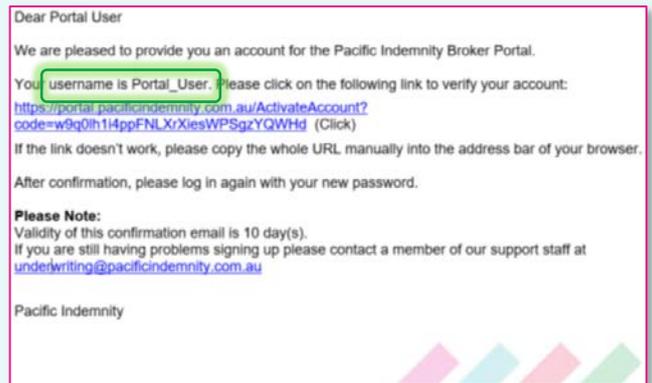


- **Resetting Your Password**

On the Login screen click **FORGOT PASSWORD?**, enter your first name, last name and email address and click **submit** button.

You will receive a confirmation message on screen and an email to complete the password reset.

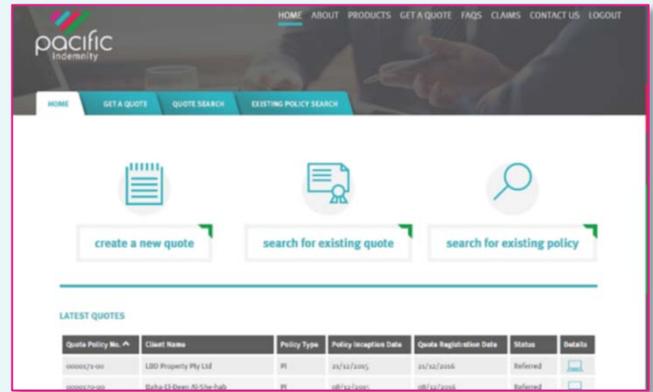
The activation email will contain a link to reset your password. Please follow the **Activating Your Account** instructions above.



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



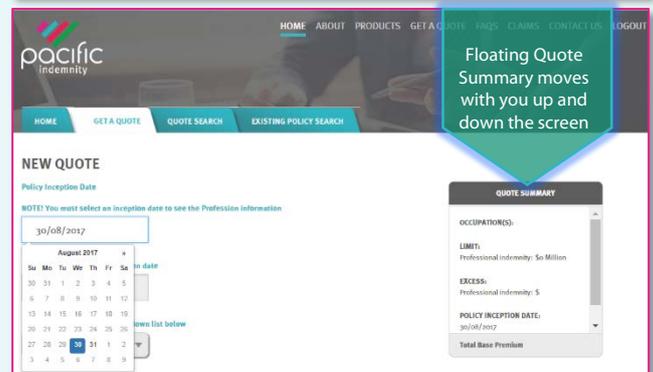
New Business Quotes

- All the proposal information is captured in the one screen
- There are over 400 Professional Services listed, of which approx. 250 will auto-rate
- All Professions can be selected in the one proposal page
- Additional entities and Trading Names can be entered at the finalised quote stage



Features

- **The floating Quote Summary** 'floats' with you on screen as you enter the data
 - ▶ shows the Base Premium as you input the data, OR
 - ▶ shows **Referred** immediately if the quote will refer to an underwriter for review (no Premium)



- **Scheme Selection** when scheme arrangements have been negotiated.

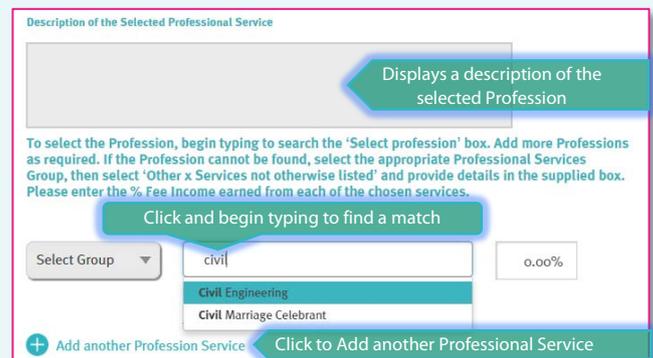
Your schemes are only visible by your staff and will rate the risk according to the Scheme rates, terms and conditions



- **Smart Search ALL available Professions** in ALL Groups by entering a phrase that searches all words within the Profession description

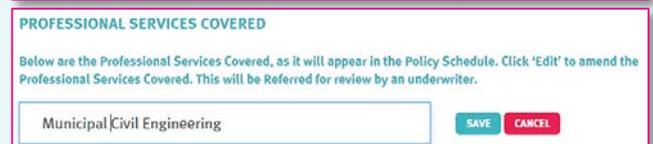
Can't find the Profession? Select a Profession Group, then 'Other x Services not otherwise listed' and enter details in the box provided

The **Description of the Selected Professional Service** box displays a description of the selected Profession



- **Editable Professional Services Covered**

- ▶ Hover your mouse over the field to show the Edit button
- ▶ Click in the box and make your changes
- ▶ Click Save
- ▶ This will be Refer to an underwriter for approval



- **Addendum questions appear** that are specific to the selected professions

- **Fee Income by State/Territory**

- ▶ Tick your client is exempt from paying stamp duty and BROWSE to attach the relevant exemption certificate
- ▶ **NSW Small Business Exemption** from Insurance Duty declaration question will appear when relevant.

Only click Yes if you have received a completed, signed and dated Exemption Declaration.

- **Professional Indemnity Limit, Excess and Broker Commission sliders** (slide to adjust)

- ▶ A higher than standard excess will attract a discount
- ▶ A lower excess will Refer for approval
- ▶ Reducing your commission will reduce the premium
- ▶ Alternative Limits & Excess boxes – for those Requested by your client using the client link

- **Public (Broadform) Liability**

- ▶ Questions appear if answered Yes
 - Number of staff
 - How many office locations
 - Limit
 - The excess is \$500 - the default for this Liability cover

- **Additional Information**

- ▶ Enter any details that need to be declared and form part of the proposal form information
- ▶ Comments received from your client will appear in this box

- **Exit without saving**

- ▶ Note if you have not proceeded to any other page or sent a link to your client, **all proposal information entered will be lost**

- **Send link to client** (see below)

- Click **Next** to proceed to the next page

Send link to client

 Send link to client

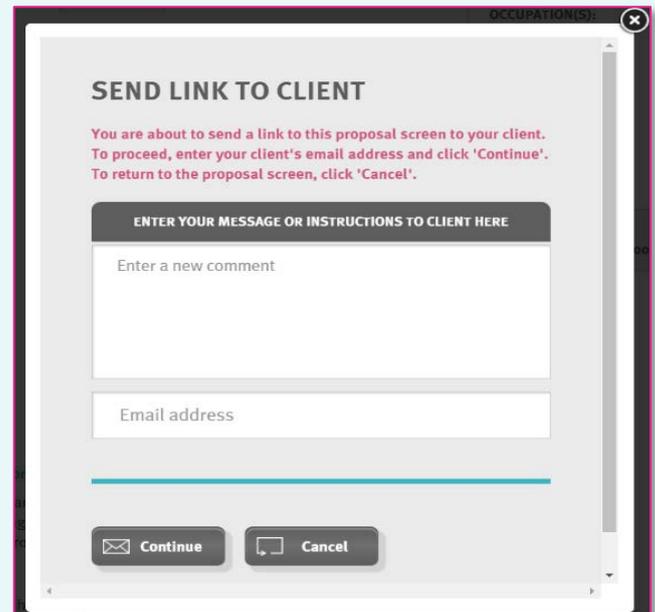
- This emails a link to your client to review and edit the proposal details
- The link will be valid for 10 days
- Your client can:
 - ▶ Choose their Preferred Inception Date
 - ▶ Save/Print a copy of their proposal when completed
 - ▶ Request Alternative Limits and Excess
- Your client's answers are **only** submitted to you (not Pacific Indemnity)
- Once submitted by the client:
 - ▶ Their answers become Read Only
 - ▶ You will be notified via email
 - ▶ You can review and modify before submitting to Pacific Indemnity
- You can see the status of your client's proposal at any stage:

Proposal Sent 

Your client has not reviewed or returned the proposal to you

Proposal Complete 

Your client has reviewed and returned the proposal to you. You will receive an email to notify you of this.



EMAIL SUCCESSFUL

Proposal sent to client successfully.

OK

What your client sees

The message entered in the SEND LINK TO CLIENT window shows at the top of the proposal screen

- Your client can elect a [Preferred Policy Inception Date](#)
- The proposal questions are exactly the same, **excluding** the Schemes selection, Broker Commission slider and the floating Quote Summary
- Your client has the ability to provide further information in the ADDITIONAL INFORMATION box
- When  is clicked:
 - ▶ A confirmation message appears
 - ▶ The answers become Read Only
 - ▶ A new window launches with a PDF file they can Save or Print
 - ▶ You will be notified via email
 - ▶ You can review and modify before submitting to Pacific Indemnity

Message/Instructions from your Broker

A comment to your client

QUOTE DETAIL

Selected Policy Inception Date (this has been selected by your broker for quotation purposes)

28/03/2018

Preferred Policy Inception Date(if different to above)

ADDITIONAL INFORMATION

28/03/2018 09:05 Portal User A comment to your client

Enter a new comment

 Next

CONFIRM

You are about to Submit this proposal form. To proceed, click 'Continue' and a new window (tab) will open with a PDF copy of your answers, from which you will be able to Save and/or Print a copy for your records. To return to the proposal screen, click 'Cancel'.

Continue

Cancel

What should I do if I get an Error Message?

On occasion we receive a LOADING ERROR message which may occur for a variety of reasons:

- ▶ Your **session has timed out** – log out and in again
- ▶ You have selected **two of the same Profession** – this is most common when selecting two of the ‘Other’ category
- ▶ A document being attached is **over 10MB** in file size

LOADING ERROR

An error has occurred whilst loading. This may be due to a break in connection or your session has timed out. Please try again by refreshing your screen (F5 or reload your browser) and logging in again.

If this error persists after trying the above, please contact Pacific Indemnity via email admin@pacificindemnity.com.au with details of when this occurred or the action you were performing, and cc your Pacific Indemnity underwriting contact. Thank you.

[OK](#)

Quote Summary Screen

This screen summarises your quote in an easy to read page.

From here you can:

- ▶ [Edit quote](#) to return to the proposal screen to edit the details
- ▶ [Email summary](#) Emails an Indicative Quote summary to your email address
- ▶ [Next](#) proceeds to the next screen for a formal quote and the ability to Bind Cover
- ▶ [Print/Download Proposal](#) will launch a new window with a PDF record of the portal proposal answers. **Please allow pop-ups for this website.**

Policy Number: **03-MED-1-0010499**

Click here to navigate between pages

Policy Number

QUOTE SUMMARY

	Total(\$)	Professional Indemnity(\$)	Public Liability(\$)
PREMIUM	1,686.00	1,496.00	190.00
GST	168.60	149.60	19.00
STAMP DUTY	185.46	164.56	20.90
POLICY FEE (INCL.GST)	55.00	55.00	0.00
TOTAL PREMIUM	2,095.06	1,865.16	229.90
BROKER COMMISSION(+GST)	337.20	299.20	38.00
BROKER COMMISSION GST	33.72	29.92	3.80
PREMIUM PAYABLE	1,724.14	1,536.04	188.10

PROFESSIONAL INDEMNITY COVER: \$4,000,000
 PROFESSIONAL INDEMNITY EXCESS: \$1,000
 PUBLIC LIABILITY COVER: \$5,000,000
 PUBLIC LIABILITY EXCESS: \$500
 POLICY INCEPTION DATE & TIME: 30/09/2017
 OCCUPATIONS: OCCUPATIONAL HEALTH AND SAFETY (OHS) CONSULTING
 BUSINESS OPERATES IN: QLD 50% / SA 50%

APPLICABLE ENDORSEMENTS

Title	Working Link
MEDICAL PRACTITIONER EXCLUSION	Working Link

Click icon to view Special Conditions

[Edit quote](#) [Email summary](#) [Next](#) [Print/Download Proposal](#)

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

Print/Download Proposal

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 as ‘To be completed by your Broker’ until the details are entered in the **Quote & Bind** screen

This includes a declaration statement 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*

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 27/09/2017

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

Insured Name

Address
 To be completed by your Broker

Selected Policy Inception Date
(This has been selected for quotation purposes)

Preferred Policy Inception Date (if different to above)

Professional Services Covered

Selected Profession(s) **Fee Income %**
 Civil Engineering 80%

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 alter 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:

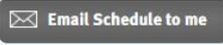
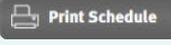
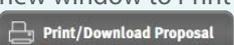
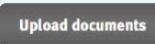
Bind Cover

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

Mandatory fields are denoted by an *

- Insured name is pre-filled from proposal screen
- Begin typing the suburb and select from the list to populate the Postcode and State fields

Other options on this screen

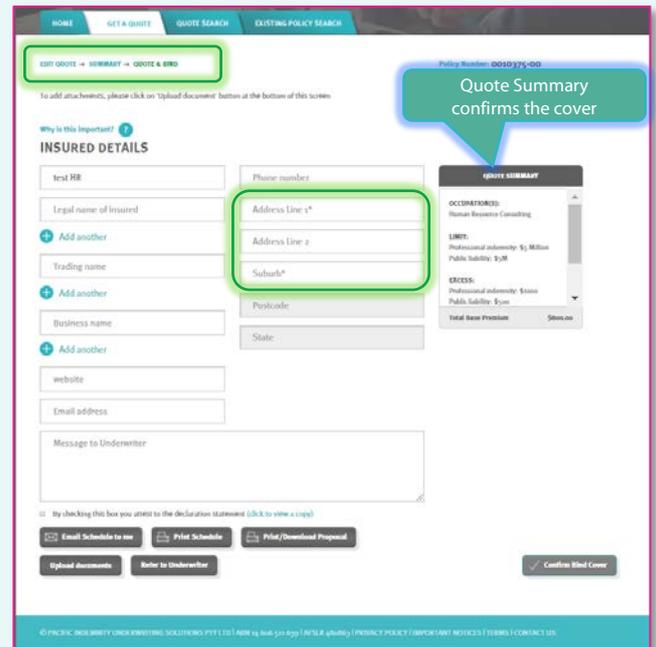
- ▶  **Email Schedule to me** to Email the quote to your Inbox
- ▶  **Print Schedule** to launch the quote schedule in a new window to Print or Save the quote to your files
- ▶  **Print/Download Proposal** to launch a new window with a PDF record of the portal Proposal answers (see the Print/Download Proposal section)
- ▶  **Upload documents** to attach 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** to Refer the risk to an Underwriter to review. Reasons may be:
 - the automatically generated terms are not competitive or require amending
 - additional information has been supplied e.g. CV/Resume, company profile, contract details etc

 **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**

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

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.



The screenshot shows the 'INSURED DETAILS' section of the Bind Cover screen. It includes fields for 'First Name', 'Legal name of insured', 'Trading name', 'Business name', 'Website', and 'Email address'. There are also fields for 'Phone numbers', 'Address Line 1*', 'Address Line 2', 'Suburb*', 'Postcode', and 'State'. A 'Message to Underwriter' text area is at the bottom. A green box highlights the address fields, and a callout bubble says 'Quote Summary confirms the cover'. A 'Confirm Bind Cover' button is visible at the bottom right.

Refer or Message the Underwriter

You can elect to Refer your quote to an underwriter to review the automatically generated terms.

Reasons you may choose to Refer:

- ▶ You have additional information e.g. a CV / Resume, company profile, contract details etc, you may like to attach to the submission via **Upload Documents**
- ▶ For a Renewal Transfer to provide the Expiring Policy Schedule and last completed Proposal form **via Upload Documents**
- ▶ Enter **Additional comments** in the box provided with the message or information you would like the Underwriter to consider

You can find this functionality in the **Quote & Bind** screen



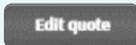
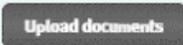
The screenshot shows the 'Message to Underwriter' section. It features a large text box for the message, a checkbox for the declaration statement, and buttons for 'Email Schedule to me', 'Print Schedule', 'Print/Download Proposal', 'Upload documents', and 'Refer to Underwriter'. A green box highlights the message text box.

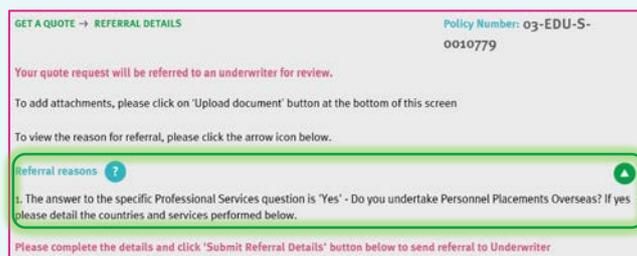
Referred Quotes

When a quote requires referral to an underwriter, the following **Referral Details** screen will display

- **Referral Reasons** can be visible by clicking 
- Complete the INSURED DETAILS including address, any trading or additional legal, business or individual's names (mandatory fields are denoted by an *)

Other options available from this screen:

- ▶  to return to the previous screen and edit the proposal information
- ▶ Click  to select documents from your file system to 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
- ▶ Enter a **Message to Underwriter**, to provide any further information you feel could assist with assessment, or information regarding a Renewal transfer
- ▶ Click  to submit the Referral for review



GET A QUOTE → REFERRAL DETAILS Policy Number: 03-EDU-S-0010779

Your quote request will be referred to an underwriter for review.

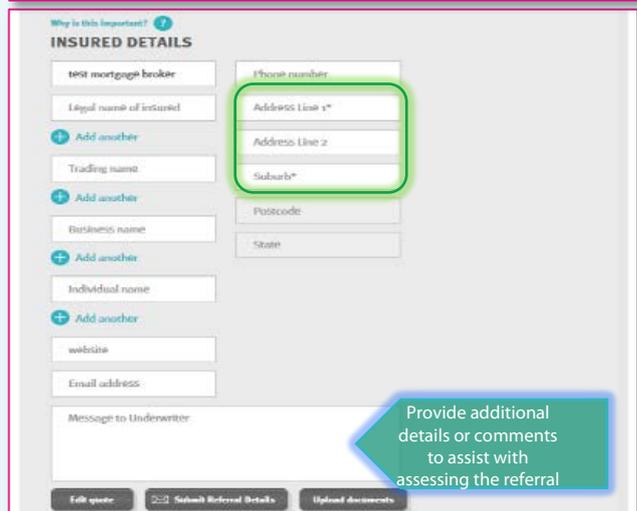
To add attachments, please click on 'Upload document' button at the bottom of this screen

To view the reason for referral, please click the arrow icon below.

Referral reasons  

1. The answer to the specific Professional Services question is 'Yes' - Do you undertake Personnel Placements Overseas? If yes please detail the countries and services performed below.

Please complete the details and click 'Submit Referral Details' button below to send referral to Underwriter



INSURED DETAILS

next mortgage broker Phone number

Legal name of insured Address Line 1*

 Add another Address Line 2

Trading name Suburb*

 Add another Postcode

Business name State

 Add another

Individual name

 Add another

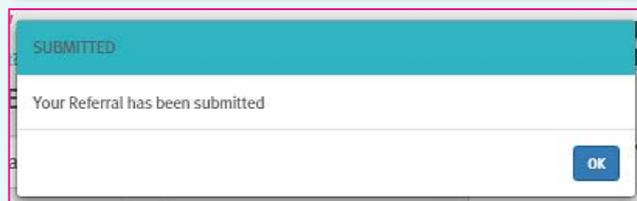
website

Email address

Message to Underwriter

Provide additional details or comments to assist with assessing the referral



SUBMITTED

Your Referral has been submitted



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	

You will receive 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.

- ▶ Click  icon to open the proposal page

To view the **Quote Summary** you have two options.

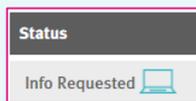
- ▶ Click    at the top left of the proposal screen
- OR
- ▶ Scroll to the bottom of the page and click  button

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	

Additional Information Requested

These quotes have a status of **Info Requested**

- You can type the response in the ADDITIONAL INFORMATION box
- You can  from your file system
- You can  to have them provide the further details and submit back to you



ADDITIONAL INFORMATION

38/03/2018 08:03 System Additional information has been requested by your Underwriter

Enter a new comment

Exit without saving




To provide supporting documents, click "Include Attachment" button above, to launch the referral screen where you can upload documents.

Renewal Quotes

Renewal quotes can be viewed and transacted on the Portal, subject to qualifying criteria

When a Renewal Invitation has been released and Auto-Quoted, the quote can be viewed and bound on the Portal



Locating Your Renewals

- In the Home screen, Click **search existing quotes**
- Enter any one of the quote details
 - Quote Number (is same as the expiring policy number)
 - Insured Name
 - Created by (broker who created the quote)
- Select **Renewal Quotes** from the Quote Selection drop-down
- Click **search** 

HOME GET A QUOTE QUOTE SEARCH EXISTING POLICY SEARCH

SEARCH INFORMATION

Quote Number:

Insured name:

Created by:

Quote Selection: Renewal Quotes

DATE INFORMATION

Inception Date from:

Inception Date to:

clear

search

SEARCH RESULTS

Quote Policy No.	Insured Name	Policy Type	Inception Date	Quote Registration Date	Broker	Status	Expiring Policy No.
002229-01	Test APIM	P/PL	08/06/2018	08/03/2018	Andrea Test	Renewal Review 	002229-00
002229-01	Scheme Sduty Two	P/PL	08/06/2018	08/03/2018	AK.Belita	Renewal Review 	002229-00
002228-01	Stamp Duty	P/PL	08/06/2018	08/03/2018	Andrea Skan	Renewal Quoted 	002228-00

Viewing the Quote Summary (see Quote Summary Screen below)

- Click the **Renewal Quoted** status to take you to the **QUOTE DETAIL** screen
- Click the **SUMMARY** link that appears at the top of the screen to view the **QUOTE SUMMARY**; or
- Click the **QUOTE & BIND** link to go directly to the Quote & Bind screen where you can:
 - Email the Quote Schedule to your Inbox, accompanied by the Policy Wording and Summary of Cover
 - View or Print the Quote Schedule (ensure **Pop-Ups are enabled for this site** to launch a new window)
 - Get a copy of the Proposal answers (ensure **Pop-Ups are enabled for this site** to launch a new window)
 - Bind Cover

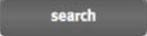
All the above functions apply to New Business quotes also

Search for existing quotes and renewals

Search Parameters include:

- Quote Number
- Insured name
- Created by = the person who created the quote
- Inception Date - from and to
- Quote Selection = New Business and/or Renewal Quotes

OR leave blank to see all

Click 



SEARCH INFORMATION

Quote Number

Insured name

Created by

Quote Selection
 Renewal Quotes

DATE INFORMATION

Inception Date from

Inception Date to

SEARCH RESULTS

Quote Policy No.	Insured Name	Policy Type	Inception Date	Quote Registration Date	Broker	Status	Expiring Policy No.
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Example of Search Results

- ▶ Click  icon to open the proposal page

SEARCH RESULTS

Quote Policy No.	Insured Name	Policy Type	Inception Date	Quote Registration Date	Broker	Status	Expiring Policy No.
0012267-00	MyName@4Years	PI/PL	20/02/2018	27/02/2018	Portal User	In Progress	
0012266-00	Silvia Meru	PI/PL	13/04/2018	16/03/2018	Portal User	Proposal Sent	
0012265-00	Jan Kwan	PI/PL	18/03/2018	16/03/2018	Portal User	In Progress	
0012264-01	Test Building Inspection Proposal	PI/PL	16/02/2018	16/02/2018	Andrea Test	Renewal Review	0012264-00
0012263-00	Silvia Meru	PI/PL	16/02/2018	23/02/2018	Portal User	Proposal Complete	
0012262-00	Scheme Commissions	PI/PL	29/02/2018	23/02/2018	Portal User	In Progress	
0012261-00		PI/PL	23/02/2018	23/02/2018		In Progress	
0012260-00	xxxx	PI/PL	27/02/2018	23/02/2018	Portal User	Referred	
0012259-01	Regression Test	PI/PL	22/02/2018	22/02/2018	AK Gritta	Renewal Review	0012259-00
0012258-01	Testing Comp.	PI/PL	22/02/2018	22/02/2018	AK Gritta	Renewal Review	0012258-00

Expired Quotes

If a quote has expired, or a renewal quote is past the inception date of the new policy period:

- ▶ The links to SUMMARY and QUOTE & BIND will no longer be active
- ▶ Click **Next** at the base of the page, the **Policy Inception Date** will be highlighted to be changed to a valid date of today or in the future – **policies cannot be back-dated**
- ▶ Update the **Policy Inception Date**, review the remainder of the proposal information (if required) and click  to get an updated Binding Quote

GET A QUOTE → SUMMARY → QUOTE & BIND

QUOTE DETAIL

Policy Inception Date

NOTE! You must select an inception date to see the Profession information

14/01/2018

Search for existing policy

Use this to search for Active (bound) Policies

Search Parameters include:

- Policy Number
- Insured name
- Created by = the person who created the quote
- Inception Date - from and to

OR leave blank to see all

Click 



SEARCH INFORMATION

Policy Number

Insured name

Created by

DATE INFORMATION

Inception Date from

Inception Date to

SEARCH RESULTS

Policy No.	Insured Name	Policy Type	Policy Inception Date	Expiry Date	Created by	Status
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