

# **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.

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.

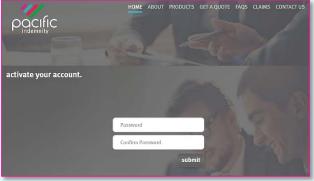
You can also reach the login screen via https://portal.pacificindemnity.com.au, or www.pacificindemnity.com.au and click the 'get a quote' button

# Forgot Password?

- 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

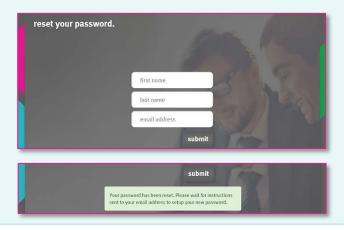
You will receive an activation email to reset your password. Please follow the 'Activating Your Account' steps above.











# 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* 

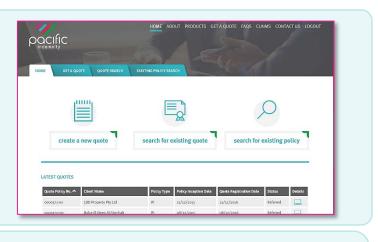
### **Find a Professional Service**

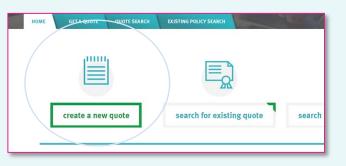
Begin typing to find a match & enter the applicable percentages Click 🛨 to Add more Professional Services

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





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SAVE CANCEL

Municipal Civil Engineering

to amend the Professio	nal Services Covered. Th	us will be Referre	EDIT		Civil Engineering
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Civil Project Ma	nagement Pty Ltd				OCCUPATION(S): Civil Engineering
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#### 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. In 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 Limi** Slide the ball along the line to adjust the limi

## **Professional Indemnity Excess**

*Slide the ball to adjust the excess* A **higher** than standard will attract a discoun-A **lower** excess will Refer

### Broker Commission

Adjusting the commission will vary the premiun

## Public (Broadform) Liability cove

Applicable questions will only appear if answered Yes

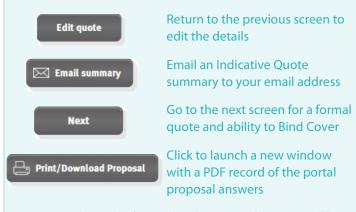
- Number of Staff
- Office Locations
- Public Liability Limit

**Claims and Circumstances** 

Click Click

## **Quote Summary Screen**

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



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

QUOTE SUMMARY Total(5) PREMIUM 200000	r pages —	
Total(5)		
		Policy Number
INCOME.	Professional indemnity(5)	Public liability(5)
2,949.00	2,949.00	
637 294-90	294.90	
STAMP DUTY 340.61	340.61	
POLICY FEE (INCLESST) 500.00	100.00	
T0794 PR740104 3,694-51	3,694-51	
BROKER COMMISSION(20%) 589.80	589.80	
DROKER COMMESSION 65T 58.98	58.98	
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PROFESSIONAL INDEMNITY	To be Devel	oned – View
COVER: \$1 000 000		ts and excesses
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PUBLIC LIABILITY COVER:		
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POLICY INCEPTION DATE & TIME: 30/09/2016		
OCCUPATION(S): CIVIL ENGINEERING, PROJECT MANAG		
BUSINESS OPERATES IN: SA 50 % I TAS 50 %		Click icon to view
		pecial Conditions
APPLICABLE ENDORSEMENTS		
Title		Wording link
PROJECT/CONSTRUCTION MANAGERS		
Edit quote 🖂 Email summary Next	Print/Download Proposal	

## **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 × / E preview pacific Pacific Indemnity Proposal form Please review, make changes as required, sign and date. Civil Project Management Pty Ltd Selected Policy Inception Date (This has been selected for quotation purp 30/09/2016 Preferred Policy Incention Date (if ssional Services Covered Civil Engir eering, Project Manag cted Profession(s) Fee **Civil Engineering** 80% roject Managem 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

MyClor attention has been drawn to the Important Natice accompanying this Propinal form and further Uwe have read these notices candidly and acknowledge myclou understanding of their canters by myclou algoritative below. The allow statements are true, and Uwe have not suppressed on instandia vity cash doubd any information given by mice allow their the state of the Proposal form and the inception date of the Impact algoritation with the Shapesal mice the state statement the date of the Proposal form and the inception date of the Impact and the Shapesal mice the state by the statement of the Impact and the Impact and the Impact and the Impact of the Impact and the Impact and the Impact and the Impact and the Impact of the Impact and Impac

We also continue that the undersigned is bare surfactives to act for and on behalf of all persons who may be entitled to inderends, under any policy which may be issued pursuant to this Proposal form and three complete this Proposal form on their behalf.

company/ practice/business.

LET (DOTE -> SUMMARY -> QUOTE LETTO Why is this leapstory ?
INSURED DETAILS
Civil Project Management Pty Ltd Phone number QUOTE SUMMARY
Legal name of insured Address Line 1* CCUPATION(S): Cold Ingenering
Add another Add another Address Line 2 Project Maragement (construction Project)
Trading name Suburb* UMMT: Professional indentity: 55 Million
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By checking this box you attest to the declaration statement (click to view a copy)
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Quote number:         Account number:         Account name:           0002567-00         0310000490         Test Brokerage
Professional Indemnity Policy
Named Insured: Chill Project Management Pty Ltd Address: 365 Days Drive, Long Reach, Taomana, 7253, AUSTRALIA

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 **Ouote & Bind** screen

CONVERT TO POLICY SUCCESSFUL Thank you for binding cover. Please accept this as confirmation of cover with effect 09-12-2015. Your email containing the applicable policy documents has been sent. Please contact Pacific Indemnity underwriting@pacificindemnity.com.au if you do not receive the email.
ок
Additional comments

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**

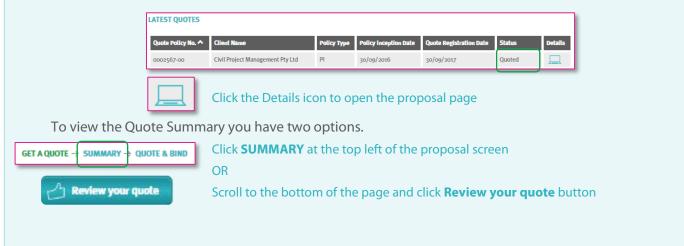
When a quote requires referral to an underwriter, the following **Referral Details** screen will display

Complete the Insured's details, including any trading or additional names

Mandatory fields*:		OCCUPATION(5):
Mandatory neids*:         Legal name of Insured         Pre-filled from previous screens         Address         Address <th>GETA GUOTE → REFERAL DETAILS Your quote request will be referred to an underwriter for review. Please petails' botton below With is this important? INSURED DETAILS (vill Project Management Legal name of insured Add another Trading name Add another Add another Musiness name Add another Musiness name Add another Musines Add Another Add Another Musines Add Another Add Another Add</th> <th>CLOTE SUMMARY  CCUPATION(5); Cril Engineering Project Masgement (Construction Project Masgement (Construction Professional indemnity: 5: Million EXCESS: Professional indemnity: 5: Sysoo Total Base Premium Referred</th>	GETA GUOTE → REFERAL DETAILS Your quote request will be referred to an underwriter for review. Please petails' botton below With is this important? INSURED DETAILS (vill Project Management Legal name of insured Add another Trading name Add another Add another Musiness name Add another Musiness name Add another Musines Add Another Add Another Musines Add Another Add	CLOTE SUMMARY  CCUPATION(5); Cril Engineering Project Masgement (Construction Project Masgement (Construction Professional indemnity: 5: Million EXCESS: Professional indemnity: 5: Sysoo Total Base Premium Referred
<b>Submit Referral Details</b> Click to submit the Referral for review You will receive the following confirmation that your Referral has been successfully submitted.	Edit quote Submit Referral Details Upload de	cueds OK
An underwriter will assess and provide a response wi	thin 24 hours, on the next bu	siness day
Your submission will have a ' <b>Referred</b> ' status	LATEST QUOTES Quote Pulicy No. A Client Name Pulicy Type Pulicy coccept/a coccept/a Chill Region Management Rey Lind Pil grology	toreption Carle Quote Registration Carle Statum Entrals

# **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.



HOME GET A QUOTE QUOTE SEARCH EXISTING POLICY SEARCH	
create a new quote search for existing quote search for existing policy	

# Search for existing quote

Search Parameters include:

- Quote number
- Insured Name
- Created by = the broker who created the quote

SEARCH RESULTS

Quote Policy No.

0000513-00

0000442-00

0000407-00

Plan

OH&S Guru

ElectMech Engineering Pty Ltd

People's Welfare Association Inc

Test Insured Pty Ltd

• Quote Registration Date - from and to

OR leave blank to see all

search

Click

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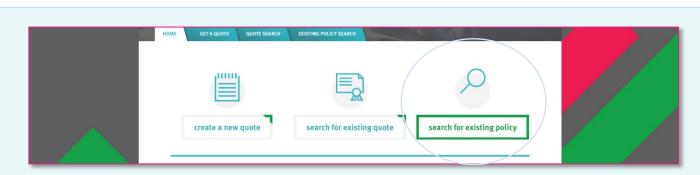
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Expired Quote



PI/PL

PI/PL

PI/PL

PI/PL

01/02/2016

21/01/2016

01/02/2016

14/01/2016

# 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	sei
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