

# **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.

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 <u>https://portal.pacificindemnity.com.au</u>, or <u>www.pacificindemnity.com.au</u> 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

(1) It is important to have this updated to the correct date at the time of binding cover

#### **Find a Professional Service**

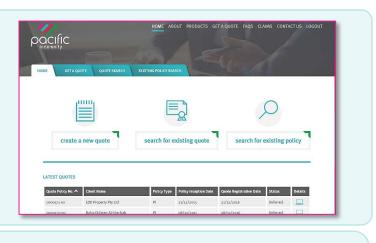
Begin typing to find a match & enter the applicable %'s Click • to Add more Professional Services

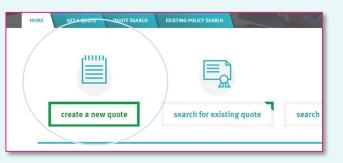
To search within a group of related Professions, select a group in '**Select Group**' to refine your search results

#### **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* 





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During the past 5 years: Has an insurer ever declined a proposal OYes No from your client, declined to renew, cancelled a policy or	© Yes ♥ No Claims and Circumstancer During the past syears: H suffered, or negligence all the ben insured by this insur which may give rise to a d insure the bean notified to insu- notified to the insures who insurance? During the past syears: A partices which may give r by any entity or individual During the past syears: H bean subject to disciplinan disciplinant systems the systems of the systems of the system systems of the systems of the systems of the system systems of the systems of the systems of the system systems of the systems of the systems of the system systems of the systems of the systems of the system systems of the systems of the systems of the system systems of the systems of the systems of the system systems of the systems of the systems of the system systems of the systems of the systems of the systems of the system systems of the	lave any claims been ma neged against any entity ance; or have any circumstan laim against or loss suff urrens? are there any circumstan ich may give rise to a claim sagainst or or individual to be insu- re there any claims against o to be insured by this in las any principal or staff	or individual mstances ered by any of ces not already laim against or ured by this inst previous r loss suffered surance?		
imposed special terms?	© Yes ♥ No Claims and Circumstances During the past 5 years: H suffered, or negligence all to be insured by this insur- which may give rise to a ci- tiese been notified to the insurers whi to suffered by any enthy insurance? During the past 5 years: A During the past 5 years: H been subject to disciplinam insconduct? During the past 5 years: H	sive any claims been me leged against any entily ande; or have any clicumstan and an against or loss suff arrers? The there any clicumstan ich may give rise to a cl ich may claims against a cher any claims against to be insured by this in las any principal or staff ry proceedings for profe as an insurer ever decili	or individual mstances ered by any of ered by any of aim against or ired by this inst previous r loss suffered surance? "member ever essional ned a proposal	© Yes © No © Yes © No	

## 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 the opportunity to enter these 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 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 premiun

## Public (Broadform) Liability cove

Applicable questions will only appear if answered Yes

- Number of Staff
- Office Locations
- Public Liability Limit

## **Claims and Circumstances**



*summary* screen

## **Quote Summary Screen**

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



launch a new window. Please allow pop-ups for this window.

TTOUD + YXAMMUZ + TTOUD A TT	A BIND	e to navigate een pages	Policy Number: 0003052-00
UOTE SUMMARY			Policy Number
	Total(5)	Professional indemnity(5)	Public liability(5)
PREMILIE	1,370.00	5,370.00	
651	137.00	137.00	
STAMP BUT	150.70	150.70	
POLICY FEE (INCL.657)	55.00	55.00	
TOTAL PREMIUM	1,712.70	1,712.70	
BROKER COMMISSION(2015	274.00	274.00	
BROKER COMMISSION 657	37.40	27.40	
PELMIUM PATADL	1411.30	1411139	
ROFESSIONAL INDEMNITY COVER-	\$1 000 000	alternative lir	eloped – View nits and excesses own selection
ROFESSIONAL INDEMNITY COVER: ROFESSIONAL INDEMNITY XCESS:	51 000 000 51000	alternative lir	
ROFESSIONAL INDEMNITY		alternative lir	
ROFESSIONAL INDEMNITY XCESS:		alternative lir via Drop D	
ROFESSIORAL INDEMNITY XEESS: PUBLIC EARLIFTY COVER: PUBLIC EARLIFTY EXCESS: POLICY INCEPTION BATE & TIME:	50000 23/11/2418	alternative lir via Drop D	nits and excesses bown selection
ROFESSIONAL INDEMNITY XCESS: PUBLIC CLARK/ITY COVER: PUBLIC CLARK/ITY COVER:	51000	alternative lir via Drop D	nits and excesses bown selection

## **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

- × / 🔚 pr pacific Pacific Indemnity Proposal form Please review, make changes as required, sign and date. Civil Project Management Pty Ltd Selected Policy Inception Date 30/09/2016 ssional Services Cover aring, Project I Civil Engin Selected Profession(s) Fee Inc Civil Engine Project Management (Cor 20% Total Declaration

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 MpObe attention has been down in the Important Nickie accompanying this Popolal form and Atthet View have read these notions careful and acknowledge mylour understanding of their content by mylour signaturan's bears. The above statements are true, and View have not suppressed or mis-stated any facts and should any information given by melo all the batween the date of this Proposal form and their integrition date of their immance to which this Proposal totations burned batween the state of this Proposal form and their integrition date of their immance to which this Proposal totations burned batween the tetred. When agree that, by submitting this form, the pericoal information live provide to Pacific indemnity Underwriting Solutions' by their the form of otherwise may be collected, budge and solicities for the manners or out in the Pacific

Indemnity Privacy Policy including for processing this application and providing me/us with cover. 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 the Proposal form and View complete this Procesal form on

To be signed by the Chairman/President/Managing Partner/Managing Director/Principal of the association/partnership/

Name

Quote & Bind Screen	HOME GETA COUTE QUOTE SEARCH EXISTING POLICY SEARCH
Complete your client's details, including any	Why is this important?  Confirms the cover INSURED DETAILS
trading or additional names	testing Phone number COURT SUMMARY
dualing of dualitonia names	Legal name of insured Address Une 1* Concest Testing & Investigation
Mandatory fields*:	Add another      Address Line 2      HMR7      Industriant indexety: 5     HR8      Trading name      Suburb*      KX0554      Indexety 5
	Add another     Postcode     Postcode
Legal name of Insured	Business name State State
(pre-filled from previous screens)	Add another  website
Address	Email address
Begin typing the suburb and select from the	Additional comments
list to populate the Postcode and State fields	
Email Schedule to me Email the quote to your Inbox	
Click to launch the quote in a new window	o pacinic micrower uno investine solutions any columna des su say farice among i meaner period i meaner period among i meaner period i meaner
	1/3
Click to launch a new window with a PDF record of the portal Proposal answers with a PDF	POCIFIC Quote Schedule
record of the portal proposal answers	Quote number:         Account number:         Account name:           0002567-00         0310000490         Test Brokerage
	Professional Indemnity Policy Named Insured: Civil Project Management Phy Ltd Address: 3450 Days Drive, Long Reach, Taxmania, 7258, AUSTRALIA
By checking this box yo	

✓ 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.

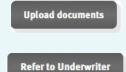
# **Refer to Underwriter**

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

CONVERT TO POLICY SUCCESSFUL	
Thank you for binding cover. Please accept this as confirmation of cover with el 09-12-2015. Your email containing the applicable policy documents has been so Please contact Pacific Indemnity underwriting@pacificindemnity.com.au if you not receive the email.	ent.
	ок
Additional comments	
By checking this box you attest to the declaration statement (click to view a copy)         Image: Schedule to me       Image: Schedule to me         Image: Schedule to me	

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(S):
	Legal name of Insured	GET A QUOTE → REFERRAL DETAILS	Policy Number: 0002567-00
	Pre-filled from previous screens	Your quote request will be referred to an underwriter for Details' button below	review. Please complete the details and click 'Submit Referral QUOTE SUMMARY
	Address	Why is this important? ?	OCCUPATION(S):
	<b>Additional Comments</b>	Civil Project Management Phone m	Civil Engineering Project Management (Construction Umber Projects)
P	rovide any details that may assist with	Legal name of insured 365 Day	IS Drive Professional indemnity: \$1 Million
	assessment of the Referral	+ Add another Address	EXCESS: Line 2 Professional indemnity: \$2500
Edit quote	Return to the previous screen to edit the details	Trading name	Total Base Premium Referred
	the details	Add another	
	Click to <b>Upload Documents</b> that	Business name TAS	
	could assist with assessment of the	Add another	
Upload documents	risk up to 10MB in file size	website	
	E.g. CV/Resume, Company Profile,	Email address	
	Claim details, Risk Management procedures, completed proposal	Additional comments	Provide any further details or comments
	form, expiring schedule/details etc		to assist with
🖂 Submit Referral Details	Click to submit the Referral for review	Edit quote Submit Referrat Details	Assessing the referral
You will receiv	ve the following confirmation that	SUBMITTED	
your Referral ł	nas been successfully submitted.		
		Your Referral has been submitted	
		3	ок
An underwrite	er will assess and provide a response wit	hin 24 hours, on the ne	xt business day
Your submissi	on will have a ' <b>Referred</b> ' status	LATEST QUOTES	
		Quote Policy No.          Clinet Name         Policy           cocccyfr/coc         Civil Project Management Phylad         Pl	r Type Policy Inception Date Quote Registration Date Status D 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. A Client Name Policy 1	ype Policy Inception Date	Quote Registration Date	Status	Details			
0002567-00 Civil Project Management Pty Ltd Pl	30/09/2016	30/09/2017	Quoted				
	Click the Det	ails icon to op	en the p	roposa	l page		
To view the Quote Summary yo	u have two o	ptions.					
GET A QUOTE - SUMMARY - QUOTE & BIND	Click SUMM	<b>ARY</b> at the top	left of t	he prop	osal screen		
	OR						
A Review your quote	Scroll to the l	bottom of the	page an	nd click	Review you	<b>r quote</b> buttor	ı

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
- Quote Registration Date from and to

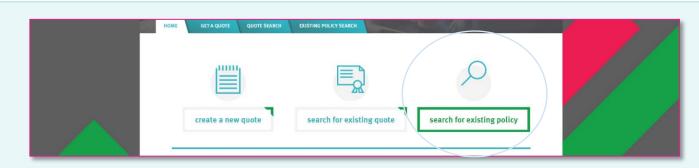
OR leave blank to see all

search

Click

EARCH INFORMATION Jote Number		DATE INFORMATIO	N		
sured name	Q	uote Registration Date from			
eated by	9	uote Registration Date to		dear search	
EARCH RESULTS					
Quote Policy No. Insured Name	Policy Type Policy	Inception Date Quot	e Registration Date	Created by	Status

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 厂
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

search

Click

Insured name		Inception Date from		
Created by		Inception Date to	dear search	í.
				l