Broker Portal
Quick Start Guide

Welcome to the Pacific Indemnity Broker Portal

What's in this guide?

How to Access the Portal

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

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?

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

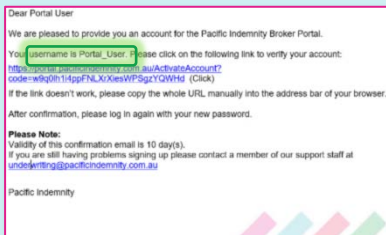- Receive a response to your Referred quotes within 24 hours (of the next business day)

Search your existing Quotes and Policies

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

Accessing the Portal

If you don't currently have access to the broker portal, you can send a request to your Pacific Indemnity Underwriting contact or email admin@pacificindemnity.com.au
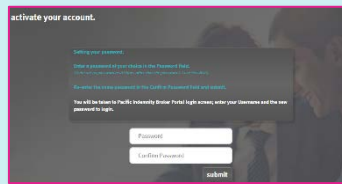
Activating your Account

▶ 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

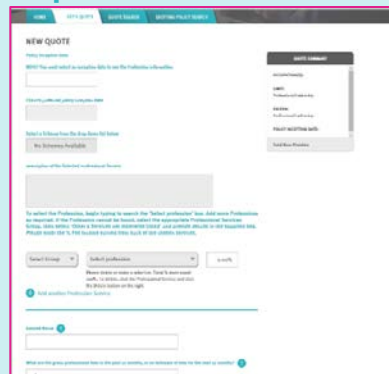**The screen refreshes to show the login screen**

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 your new password.

How does it work?

Auto Quotes – a quote indication is generated. When the final identifying details are entered e.g. other names and address, a formal binding quote can be emailed and can be bound on-line

Proposal Screen

Select:
▶ Inception Date (today or later)
▶ Profession(s)
▶ Limit
▶ Excess

Enter:
▶ Insured Name
▶ Fees
▶ Income per State %

Answer:
▶ Addendum questions (if any)
▶ Overseas Income
▶ Public Liability cover

Click **Next**

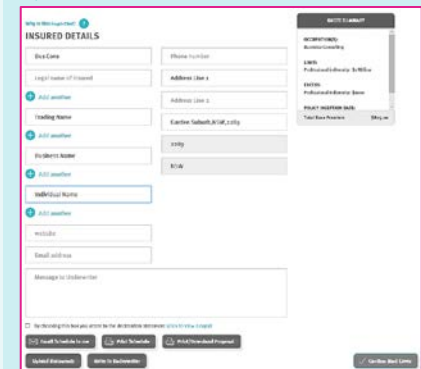### Quote Summary Screen

Review:
▶ Premium
▶ Limit
▶ Excess
▶ Inception Date
▶ Occupation(s)
▶ State(s) of risk
▶ Applicable Endorsements

You can:
▶ Edit quote
▶ Email Summary
▶ Print/Download Proposal
▶ Proceed to Quote & Bind screen

Quote & Bind screen

Enter:
▶ Additional Names (if any)
▶ Address Details

You can:
▶ Email Quote Schedule to you
▶ Print Schedule
▶ Print/Download Proposal
▶ Refer to Underwriter
▶ Bind Cover

To **Refer to an Underwriter** for review:
▶ Add a Message to Underwriter
▶ Upload Documents

Referred Quotes – detail(s) need to be reviewed by an underwriter before a formal response can be provided. If the quote request is accepted, this appears as a Quoted status. You will receive a response within 24 hours on the next business day

Proposal Screen

Select:

- Inception Date (today or later)
- Profession(s)
- Limit
- Excess

Enter:

- Insured Name
- Fees
- Income per State %

Answer:

- Addendum questions (if any)
- Overseas Income
- Public Liability cover

Click Next

Referral Screen

Enter:

- Additional Names (if any)
- Address Details
- s

You can:

- Add a Message to Underwriter
- Upload Document
- Edit quote

Submit Referral Details

Within 24 Hours on next business day

Receive response from a Pacific Indemnity Underwriter

- Accepted & Quoted
  or
- Request for more information
  or
- Declined to quote

Send Link to Client – a link is sent to the email address nominated by you, is valid for 10 days and allows your client to review and/or change details in the proposal screen

Send Link to Client screen

- Enter a message you would like to appear at the top of your client's proposal form
- Enter your client's email address
- Click **Continue**

Client completes & returns

- You will receive an email advising that your client has completed their proposal form
- You can review and amend as required & click **Next**

Submit to receive Auto Quote or Refer to Underwriter

- Follows the processes above, once the proposal is received and submitted by you
- Auto Quotes are available for Binding Cover on-line and immediately receive the policy documents via email

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 ✓ Confirm Bind Cover

▸ Immediately receive the Policy Documents via email

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

▸ Search via **Quote Search**, select **Renewal Quotes**, click **Search**
▸ If changes are required, update the proposal, click **Next** to proceed to the **QUOTE SUMMARY**
▸ If no changes required, click the SUMMARY link at the top of the screen to view the **QUOTE SUMMARY**
▸ Bind Cover if the renewal terms are satisfactory, or talk to us if you would like them reviewed

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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

Print/Download Proposal

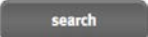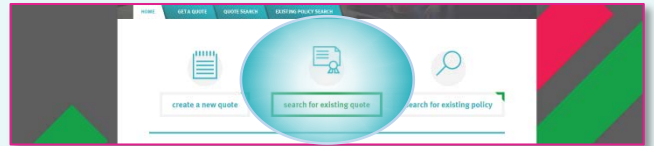This is a record of the answers entered in the Portal proposal page that can be printed and/or saved.

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**

Example of Search Results

▸ Click 🖥 icon to open the proposal page

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**

Would like further details?

Refer to **Welcome to the Pacific Indemnity Broker Portal** – full instructional document