

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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			nber 20				LIMIT:
Su			We Th		Sa	essional Service	Professional indemnity:
28 4	29 5	30 6	31 1 7 8	2 9	3 10		EXCESS: Professional indemnity:
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SAVE CANCEL

Pacific Indemnity Underwriting Solutions Pty Ltd | ABN 14 606 511 639 | AFSL# 480863

Municipal Civil Engineering

to amend the Profession	at Services Covered. TI	his will be Referre	for review by an		OCCUPATION(S): Civil Engineering
Civil Engineering Please answer the speci	fic Professional Service	es questions below			LIMIT: Professional indemnity: \$1 Million
What % of total fees app	ly to Pollution Control S	Systems Design?	0%		EXCESS: Professional Indemnity: \$
What % of total fees app companies e.g. Water, 6 Telecommunication carri	ly to services provided as, Electricity and/or iers?	to Utilities	0%		POLICY INCEPTION DATE:
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Are you or have you or a Entity either (i) engaged share of any Entity engag fabrication?	in, or (ii) have or had a	controlling	© Yes [©] No		
Real estate development The manufacture, sale or or patented production p	distribution of any pro	duct or process	© Yes © No © Yes © No		
Insured Name ?					QUOTE SUMMARY
	nagement Pty Ltd				
					OCCUPATION(S): Civil Engineering Project Management (Construction
What are your gross pro	ofessional fees in the la	ast 12 months? ?			Project Management (Construction Projects)
\$450,000.00					LIMIT: Professional indemnity: \$1 Million
Please provide a % bre	akdown of fee income b	y state and/or terr	itory.		EXCESS:
STATE/TERRITORY	PERCENTAGE	SD EXEMPT?			Professional indemnity: \$2500 Total Base Premium \$2,94
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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 Review your quote to proceed to the Quote

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.

ET A QUOTE -> SUMMARY -> QUO	IL & BIND	e to navigate	Policy Number: 0002567-0
		een pages	
QUOTE SUMMARY			Policy Number
	Total(5)	Professional indemnity(5)	Public liability(\$)
PREMIUN	2,949.00	2,949.00	
ଣା	294-90	294.99	
STAMP DUTY	340.61	340.61	
POLICY FEE (INCL.651)	\$00.00	100.00	
TOTAL PREMIUM	3,694-51	3,694.51	
BROKER COMMISSION(20%)	589.80	589.80	
DROKER COMMISSION 651	58-98	58.98	
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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 d ssional Services Covered Civil Engir eering, Project Manag cted Profession(s) Feel **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

MyCOx strentism has been drawn to the Important Norlice accompanying this Proposal form and Aurther Uwe have read these notices candiday and acknowledge mylicia understanding of their canners by mylicer algoritantive below. The allow statements are hus, and Uwe have not suppressed on the stated and yeas and should any information given by multi-alter between the date of this Proposal form and the inception date of the Impactance to which this Proposal time is the state to the state of the Impocal form and the inception date of the Impactance to which this Proposal while is the state to the Impactance of the Impactance and the Impactance Impactance of the Impactance o

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.

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		EDIT QUOTE \rightarrow SUMMARY \rightarrow QUOTE & BIND		Quote Summary Policy Wallher: 0002567-00 confirms the cover
Complete your client's d	letails, including any	Why is this important? ? INSURED DETAILS		
trading or additional na	mes	Civil Project Management Pty Ltd	Phone number	QUOTE SUMMARY
J		Legal name of insured	Address Line 1*	OCCUPATION(S): civil Engineering
	Mandatory fields*:	+ Add another	Address Line 2	Project Management (Construction Projects)
		Trading name	Suburb*	UMIT: Professional indemnity: \$s Million
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Confirm Bind Cover	The Confirm Bind Cover b	outton becomes a	ctive when you	u have read and tick
	the box to confirm you agi			

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.

CONVERT TO POLICY SUCCESSFUL

Thank you for binding cover. Please accept this as confirmation of cover with effect o9-12-2015. 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.

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

Additional comments			
By checking this box you atto	st to the declaration statem	ent (click to view a copy)	
🖂 Email Schedule to me	🕒 Print Schedule	Upload documents	Refer to Underwriter

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

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*:	оссими	DN(5):
Legal name of Insured Pre-filled from previous screens Address Address Additional Comments Provide any details that may assist with assessment of the Referral Return to the previous screen to edit the details Uptoad documents Uptoad documents Edit quote Click to Upload Documents that could assist with assessment of the risk E.g. CV/Resume, Company Profile, Claim details, Risk Management procedures, completed proposal form, expiring schedule/details etc	CIT ACTORT + RETERAL DETAILS Why this important? INSURED DETAILS (vil Project Management Cit Vil Project Management Cit Add another Cit Management <	Referal under Ss Milion Ssysoo Referred
You will receive the following confirmation that your Referral has been successfully submitted.	SUBMITTED Your Referral has been submitted	ОК
An underwriter will assess and provide a response with	ithin 24 hours, on the next business day	
Your submission will have a ' Referred ' status	LATEST QUOTES Clinel Runa Pulicy Type Pulicy Inseption tonic Quote Registration tonic Quote Pulicy No. A Clinel Runa Pulicy Type Pulicy Inseption tonic Quote Registration tonic concept/con Cleil Project Management Ply1Ad PH gal/gg/and gal/gg/and gal/gg/and	Slatus Detail 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.



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

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15/01/2016

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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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