pacific news
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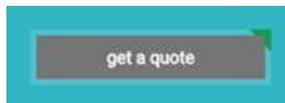
Welcome to Pacific Indemnity's first email newsletter.
This newsletter is focused on the most recent changes and updates to the Broker Portal.

get a quote

New

Updates and Changes

Last night we had an update to our systems and implemented a few changes to the Broker Portal system. Below are the details regarding the changes.

Send a link to your client

Send link to client

When you complete a Portal proposal form, you have the option to **send a link to your client** via email. The link will be valid for 10 days.
This gives you the opportunity to have your client review the detail in the proposal form and submit their confirmation of answers back to you before submitting it to Pacific Indemnity. You can see that 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.

Scheme Selection

Select scheme

We now have the facility to load Scheme arrangements into our system. These Schemes can also be selected from the Broker Portal.
If you negotiate a Scheme arrangement with us, this Scheme will only be visible for selection by your staff and will rate the risk according to the Scheme rates, terms and conditions.

Overseas Income

New Question:
Overseas Income

We have added a new question to assist with gathering information about any overseas work undertaken by your client. This information can then be used to further negotiate any widening of the Jurisdiction cover.
Note: the default Jurisdiction cover is Worldwide excluding USA and Canada

Renewals on the Broker Portal

search for existing quote

Quote Selection
Renewal Quotes

Renewal quotes can now be viewed and transacted on the Portal, subject to qualifying criteria. Where a renewal quote has been released, this is now visible and may be bound on the Portal.
Quick Tip!

GET A QUOTE → SUMMARY → QUOTE & BIND →

The quickest and easiest way to view a summary of the renewal* terms is by clicking on the SUMMARY link that appears at the top of the screen when you open the proposal. You can also go directly to the QUOTE & BIND screen to:

▸ Send yourself the Quote Schedule, accompanied by the Policy Wording and Summary of Cover
▸ View or Print the Quote Schedule *(make sure Pop-Ups are enabled for this site to launch a new window)*
▸ Get a copy of the Proposal answers *(make sure Pop-Ups are enabled for this site to launch a new window)*

* This also applies to New Business quotes.

Other New Proposal Sections & Details

Alternative Limits & Excess section

There are new sections in the proposal to allow you (and your client) to request alternative limits and excess options. This is most useful if a quote has been Referred for review.

Alternative PI limits requested - Please adjust the PI Limit slider above to see the applicable Premium for the below requested limits (if not Referred)

$0	$0	$0

Client Preferred Inception Date

Client's preferred policy inception date

31/05/2017

When you send a link to your client, your client has the option request an inception date to begin their policy. This date shows when the proposal has been submitted back to you.
You can then update the Selected Policy Inception Date to ensure you quote is linked to this date.

Referral Reasons

Referral reasons ?

If your Proposal has been Referred to an underwriter for review, the Referral reasons are now available to be viewed in the REFERRAL DETAILS screen.

Click the ▼ to roll-down to see the reasons

Referral reasons ? ▲

1. An answer to a Claims and Circumstances question is Yes
2. Provision of Professional Services - Accounting (Audit)
3. The chosen PI Excess is below the standard excess

Did you know???

The Broker Portal can **auto-rate over 250 Professions**, which means you can get a quote and bind a policy within minutes

You can **change the Professional Services** that will appear on the Schedule – *this will need approval from an underwriter, which will be reviewed as soon as possible (within 24 hours, at the latest)*

How do I change the Professional Services Covered?

After you have selected all the Professional Services to be covered under the policy, scroll to section called 'PROFESSIONAL SERVICES COVERED' and hover your cursor over the Professional Services you wish to alter, click the 'EDIT' button that appears on the right and type the required Professional Services.
Click 'SAVE' that appears on the right. You can also delete other Profession names that appear if your preferred description covers all the services selected.

Forgotten Your Password?

Username

Password

FORGOT PASSWORD?   submit

Click **FORGOT PASSWORD?**, enter and submit the requested details to get an email to reset your password

Don't have a Portal login?

Click **CONTACT US** or Email the following details to underwriting@pacificindemnity.com.au:

- ‣ Your Full Name
- ‣ Brokerage Name & branch (if relevant)
- ‣ Email address
- ‣ Contact Phone Number

Want to know more?

Visit our website…

[HOME](#)   [ABOUT US](#)   [PRODUCTS](#)   [RESOURCES](#)   [FAQs](#)   [CLAIMS](#)   [CONTACT US](#)

Thank you and kind regards,

The Team at Pacific Indemnity

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Please note the best way to contact us is via our mobile phones

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