PACIFIC INDEMNITY
Broker Portal

Welcome to the Pacific Indemnity Broker Portal

Click each heading to jump to that section within the document

HOW TO ACCESS THE PORTAL

Activating Your Account

When first registered on the Broker Portal, you will receive two emails:

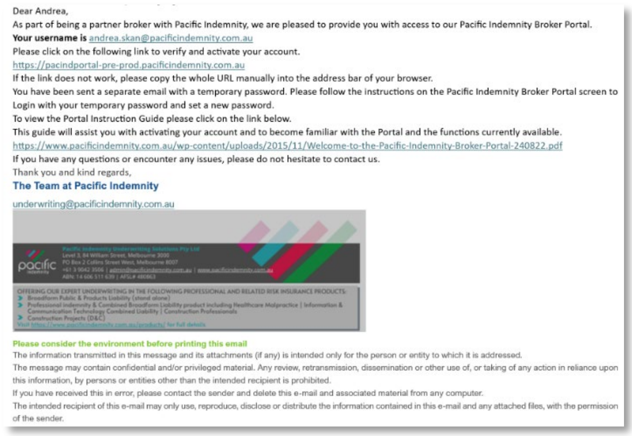
1. Welcome to the Pacific Indemnity Broker Portal email containing a link to the portal and requesting you to verify and activate your account
   - *Bookmark or save as Favourite in your Browser to return easily at any time.*
2. Pacific Indemnity Broker Portal Activation email that contains your temporary password.

Click the link to access the login screen, enter your username and temporary password, click Submit. You will be required to set a new password.

Setting Your Password

When asked to set a new password, enter the New Password you wish to set for the Portal, then re-enter the Password to confirm the password. Click Submit.

Details of Password requirements are provided with clear instructions on screen to assist you.



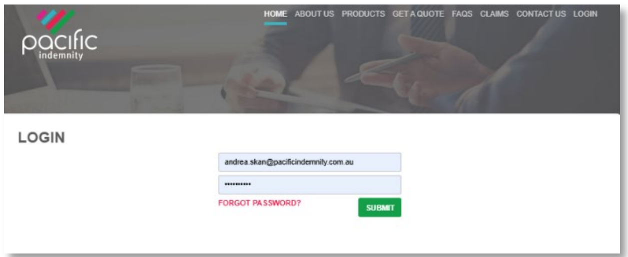
Dear Andrea,
As part of being a partner broker with Pacific Indemnity, we are pleased to provide you with access to our Pacific Indemnity Broker Portal.
Your username is andrea.skan@pacificindemnity.com.au
Please click on the following link to verify and activate your account.
https://pacindportal-pre-prod.pacificindemnity.com.au
If the link does not work, please copy the whole URL manually into the address bar of your browser.
You have been sent a separate email with a temporary password. Please follow the instructions on the Pacific Indemnity Broker Portal screen to Login with your temporary password and set a new password.
To view the Portal Instruction Guide please click on the link below.
This guide will assist you with activating your account and to become familiar with the Portal and the functions currently available.
https://www.pacificindemnity.com.au/wp-content/uploads/2015/11/Welcome-to-the-Pacific-Indemnity-Broker-Portal-240822.pdf
If you have any questions or encounter any issues, please do not hesitate to contact us.
Thank you and kind regards,
The Team at Pacific Indemnity
underwriting@pacificindemnity.com.au

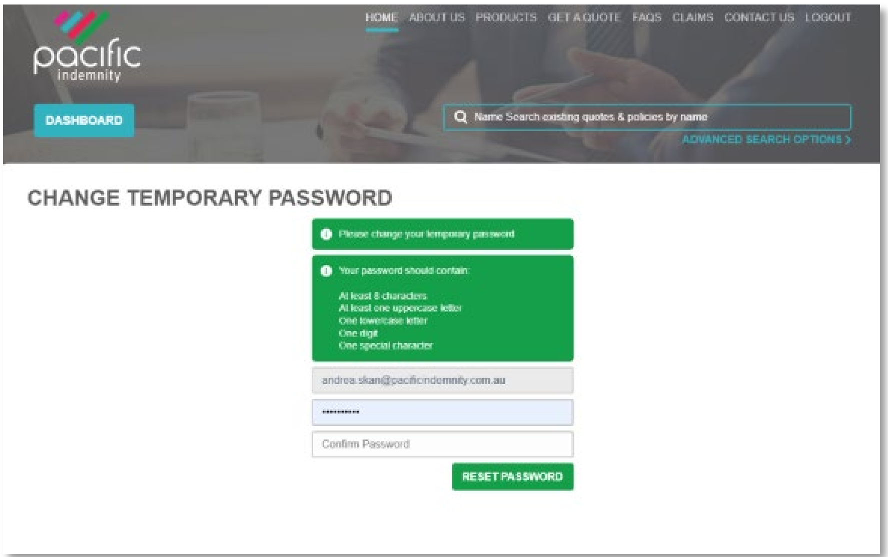
Please consider the environment before printing this email
The information transmitted in this message and its attachments (if any) is intended only for the person or entity to which it is addressed.
The message may contain confidential and/or privileged material. Any review, retransmission, dissemination or other use of, or taking of any action in reliance upon this information, by persons or entities other than the intended recipient is prohibited.
If you have received this in error, please contact the sender and delete this e-mail and associated material from any computer.
The intended recipient of this e-mail may only use, reproduce, disclose or distribute the information contained in this e-mail and any attached files, with the permission of the sender.

Pacific Indemnity Broker Portal Activation
underwriting@pacificindemnity.com.au(underwriting@pacificindemnity.com.au via amazonses.com)
To Andrea Skan
Tue 18/03/2025 8:12 AM

An email was sent to you from Pacific Indemnity with a link to the Broker Portal; please use this link to connect. Then log in using your email address and the temporary password below:

Your username is andrea.skan@pacificindemnity.com.au and **temporary password** is c4|08ZTL





If you successfully set your new password, you will be automatically navigated to the DASHBOARD

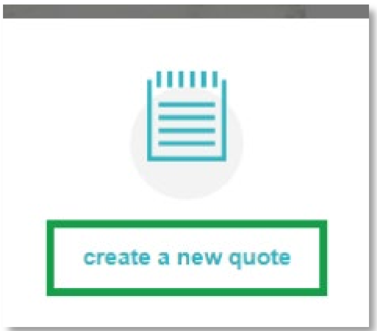
QUICK START GUIDE

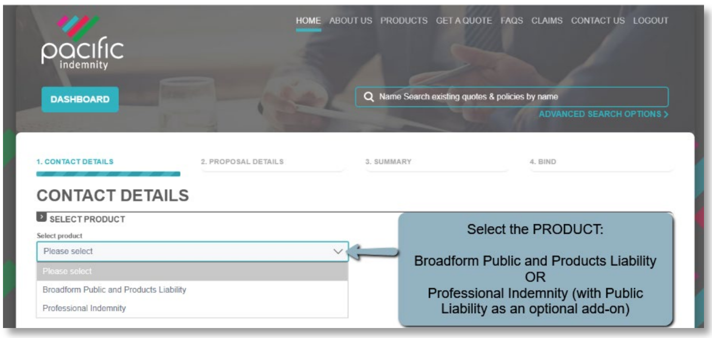
This provides a quick reference as to what the Portal can do and how it works - **Auto Quote, Referred Quotes, Send Link to Client, Binding Cover**. For more detailed instructions, including how to Access the Portal, please click here or click each sub-heading.

START A NEW QUOTE

Click create a new quote:

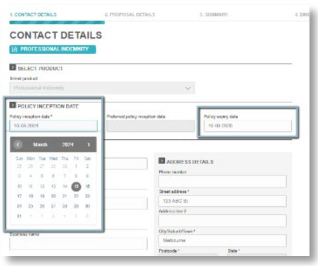
From the drop-down box, select the PRODUCT then click on **CREATE >**





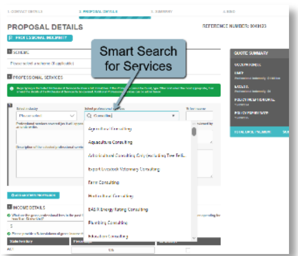
AUTO QUOTES – Once the CONTACT DETAILS and PROPOSAL DETAILS have been entered (see below), a quote indication will be generated. A formal binding quote can be emailed and bound online.

CONTACT DETAILS



- Select the period of insurance
- Enter:
  - ✓ Legal name of Insured
  - ✓ Any additional Legal, Trading, Business and/or Individual Names
  - ✓ ABN
  - ✓ Website
  - ✓ Address Details
- Click **NEXT >**

PROPOSAL DETAILS

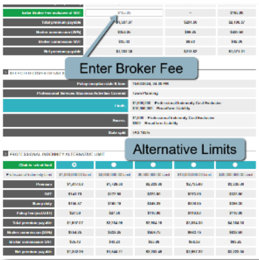


- Complete the proposal
- SEND LINK TO CLIENT for their review (optional)
- Go BACK
- SAVE & EXIT

OR

- Click on **SUBMIT** to progress to the SUMMARY screen

SUMMARY Screen

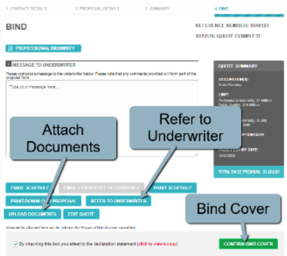


- Enter a Broker Fee (optional)
- Alternative Limits and/or Excesses are available for selection
- Email the Quote Summary
- PRINT/DOWNLOAD PROPOSAL

OR

- Click on **NEXT >** to go to the BIND screen

BIND Screen



Option to:

- EMAIL SCHEDULE
- EMAIL CERTIFICATE OF CURRENCY
- PRINT SCHEDULE
- PRINT/DOWNLOAD PROPOSAL
- Refer to Underwriter
- UPLOAD DOCUMENTS
- EDIT Quote

OR

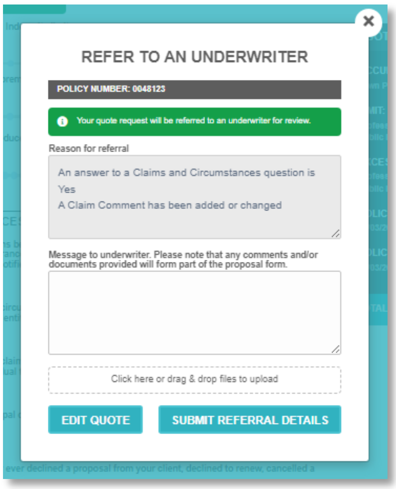
- BIND COVER

REFERRED QUOTES – detail(s) need to be reviewed by an underwriter before a formal response can be provided. If a quote request is accepted, this will appear as "Quote Complete" or "Approved" status in your Dashboard.

You will receive a response within 24 hours (on the next business day).

Floating Quote Summary

Referral Pop-Up



Response Within 24 Hours

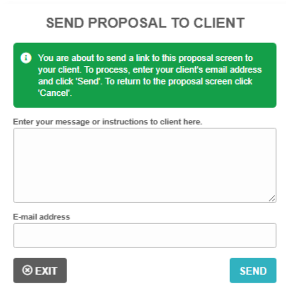
Receive a response from our Pacific Indemnity Underwriters on the next business day

- Accepted & Quote Complete or Approved; or
- Request for more information; or
- Declined to quote

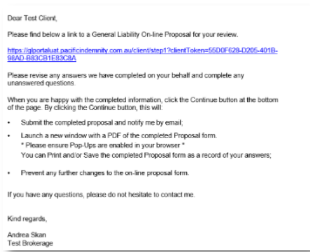
SEND LINK TO CLIENT – a link is sent to the email address nominated by you.

The link is valid for 10 days and allows your client to review and/or change details in the CONTACT DETAILS and PROPOSAL DETAILS screens

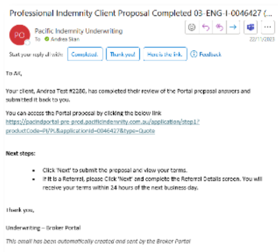
SEND LINK TO CLIENT Pop-Up



Client Receives Link In Email



Client Completes & Returns



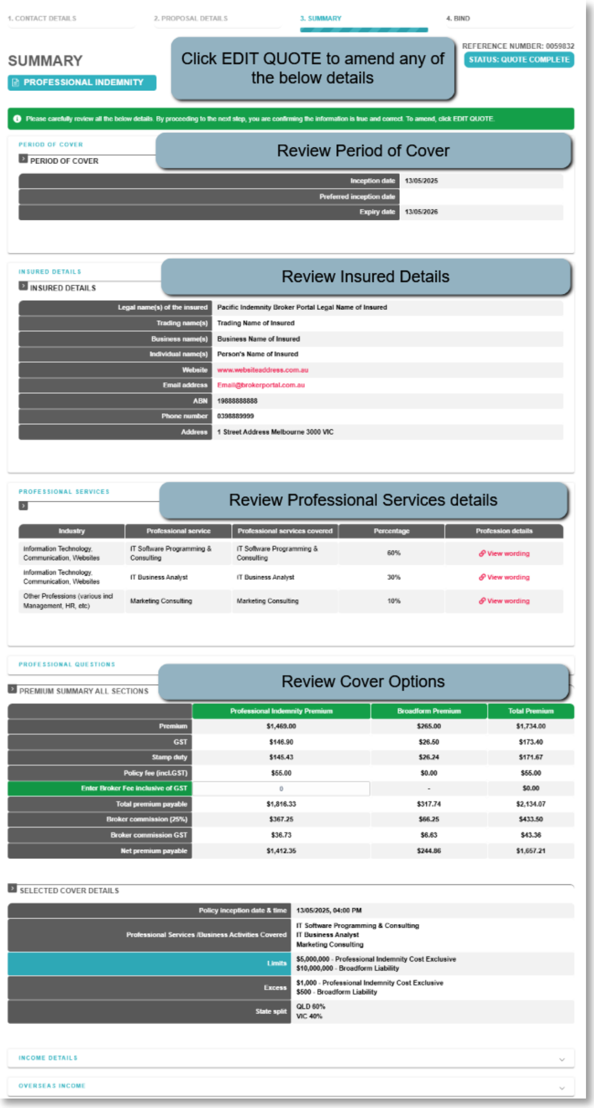
Broker to Submit Proposal to Underwriter

You are advised by email that the proposal is completed and ready to submit for a quote

BINDING COVER - Review the SUMMARY page carefully. By proceeding to the next step, you are confirming the information is true and correct. To amend, click EDIT QUOTE.

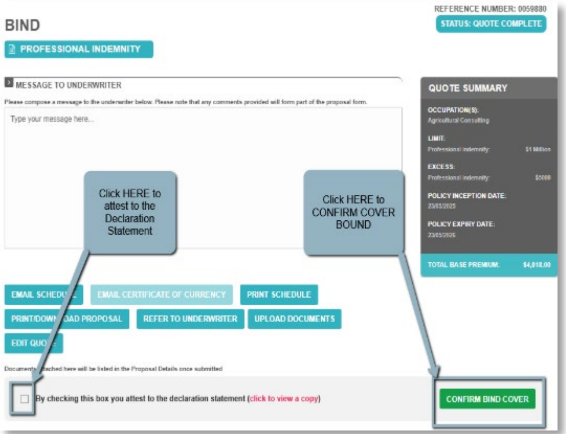
Review Inception and Expiry Date, Cover Details and Options

- Inception Date must be equal to or, no more than 3 months, greater than today's date
- Amend Expiry Date (if the client requires a policy term not equal to 12 months)
- Review Alternative Limits and Excess Options
- Update cover options in PROPOSAL DETAILS or SUMMARY screen
- EDIT QUOTE to amend

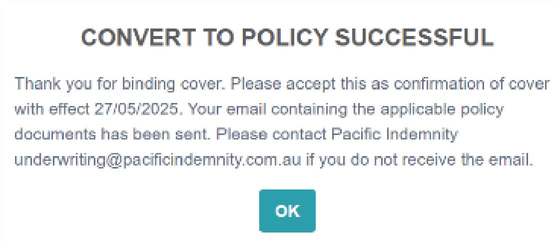


Confirm the Declaration & Bind Cover

- From SUMMARY screen go directly to **BIND** cover screen; OR click on **NEXT >**



- QUOTE SUMMARY shows the cover details
- Click to attest to the Declaration Statement
- Click on **CONFIRM BIND COVER**
- Policy Documents are sent instantly via email



RESENDING POLICY DOCUMENTS

Policies List

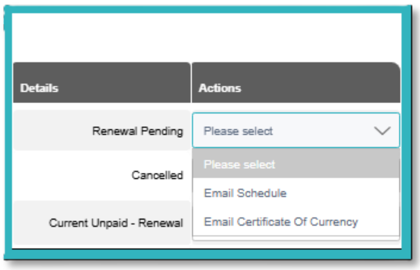
Go to Policies List in the Dashboard

Locate Policy

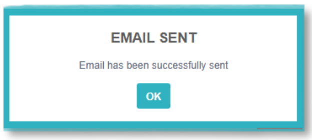
- Locate the Policy in the POLICIES LIST
- The option to Email Schedule, or Email Certificate of Currency, is in the Actions column

Select The Document

- Select the document to be emailed



- Enter the email address
- Confirmation the email has been sent appears in a Pop-up



WHAT SHOULD I DO IF I GET AN ERROR MESSAGE?

On occasion you may receive an error message which may occur for a variety of reasons, including:

- The system is still saving the previous answer - try to Refresh or Reload
- A problem with the internet connection

If none of the above reasons apply, please let us know what you were doing at the time, and we will promptly investigate

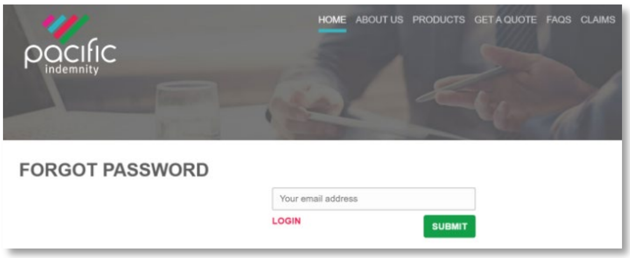
WHO CAN I CONTACT?

- 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 or underwriting@pacificindemnity.com.au and cc your underwriting contact with details of the action you were performing, and any supporting screen shots as these will greatly assist with resolving the problem

Our contact details are:

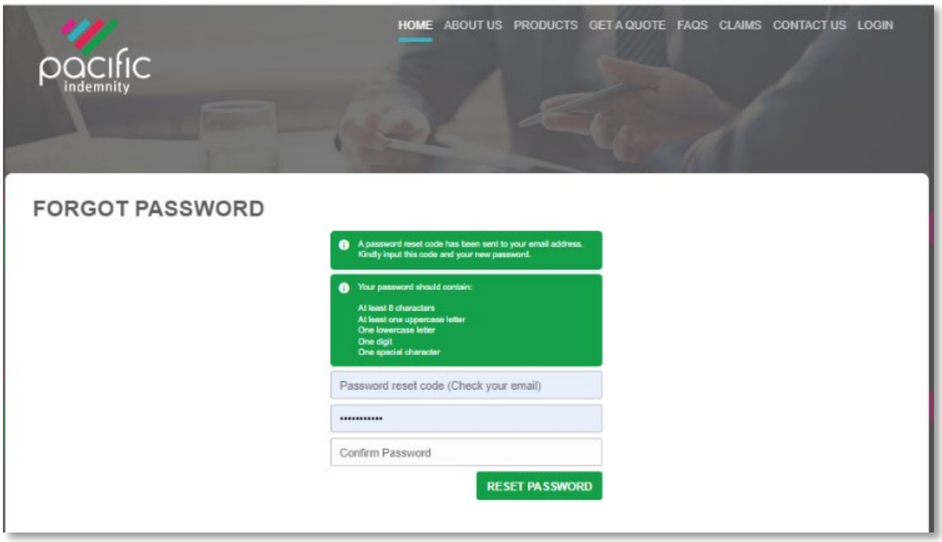
Who	Title	Call	Email
Steven Duckworth	Business Development	0431 796 953	steven.duckworth@pacificindemnity.com.au
Sharmella Perera	Systems & Administration	0478 787 617	sharmella.perera@pacificindemnity.com.au
Veronica Criss	Administration Assistant	0413 057 669	veronica.criss@pacificindemnity.com.au
Melinda Farlow	Senior Underwriter	0418 452 277	melinda.farlow@pacificindemnity.com.au
Oliver Rawnsley	Assistant Underwriter	0411 075 955	oliver.rawnsley@pacificindemnity.com.au
Amanda Fung	Senior Underwriter	0432 226 084	amanda.fung@pacificindemnity.com.au
Simone Oakman	Senior Underwriter	0431 618 869	simone.oakman@pacificindemnity.com.au
Cameron Temby	Senior Underwriter	0411 010 697	cameron.temby@pacificindemnity.com.au
Andrea Skan	Senior Underwriter	0419 237 270	andrea.skan@pacificindemnity.com.au
Rhythm Valera	Senior Liability Underwriter	0421 773 143	rhythm.valera@pacificindemnity.com.au
David Hamilton	Senior Underwriter	0404 801 129	david.hamilton@pacificindemnity.com.au
Jane Aylward	Senior Underwriter	0435 806 755	jane.aylward@pacificindemnity.com.au
Steven Lau	Northern Region Manager	0417 229 520	steven.lau@pacificindemnity.com.au
Edward Rawnsley	Joint - Managing Director	0432 356 554	edward.rawnsley@pacificindemnity.com.au
Greg Hansen	Southern Region Manager	0437 410 810	greg.hansen@pacificindemnity.com.au
Michael Taylor	Senior Liability Underwriter	0401 625 997	michael.taylor@pacificindemnity.com.au
Barry Long	Senior Underwriter	0480 721 384	barry.long@pacificindemnity.com.au

RESETTING YOUR PASSWORD



- On the Login screen click FORGOT PASSWORD?
  Enter your email address and click on **SUBMIT**.

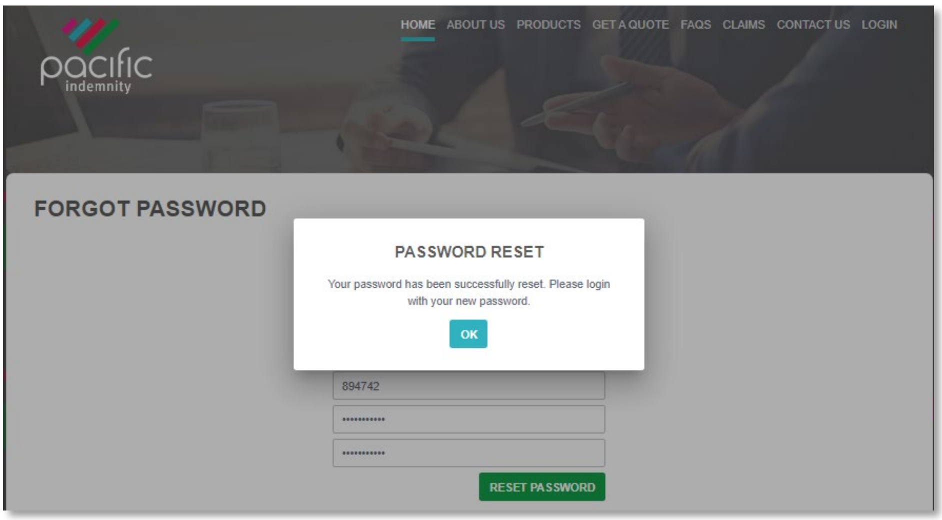
- The screen will progress to the FORGOT PASSWORD screen.



- You will need to enter the Password Reset Code (please check your emails)

- Follow the instructions on screen for Setting a New Password and Re-enter the Password and click RESET PASSWORD

- You will receive a PASSWORD RESET confirmation pop-up.

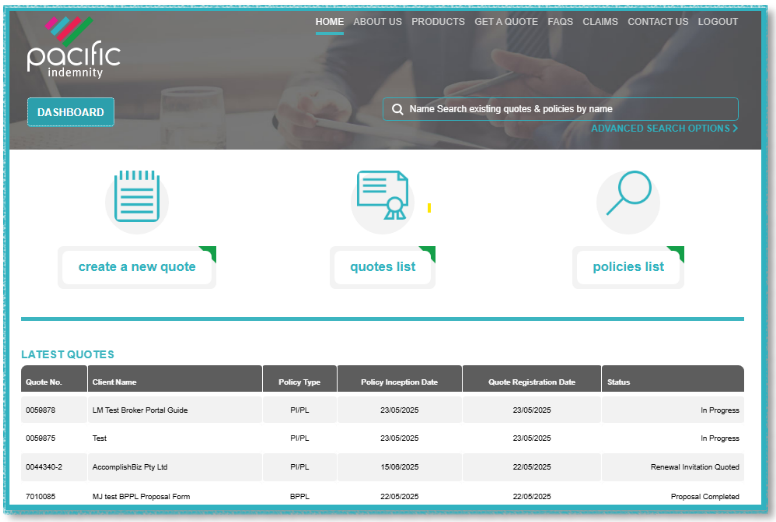


- Log in with your new password.

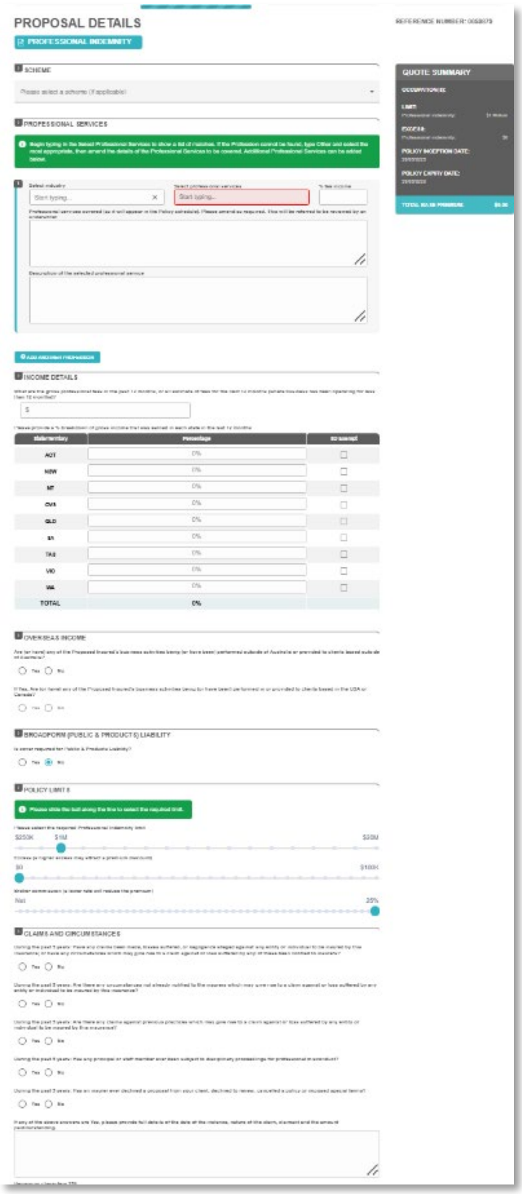
DASHBOARD

This is the Dashboard. Here you can:

- ✓ Create a new quote
- ✓ Search existing Quotes
- ✓ Search existing Policies
- ✓ See a list of Latest Quotes
- ✓ Click anywhere in the row to Open
- ✓ Name Search OR
- ✓ Advanced Search of quotes and policies



NEW BUSINESS QUOTES



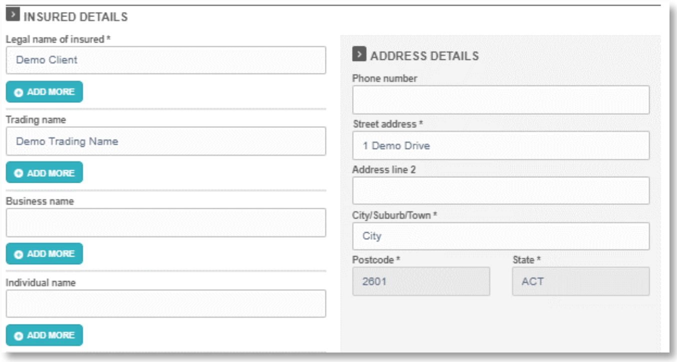
FEATURES:

- All the proposal information is captured in one screen
- There are:
  - ✓ 1,700 ANZSIC classified Business Activities listed, of which over 1,300 of these have the potential to auto-rate
  - ✓ Over 470 Professions with more than half of these having the potential to auto-rate
- Details entered in the proposal are saved every time you move to the next question (therefore no loss of data if you have a break in connection)
- Selection of Policy Inception and Policy Expiry Dates allow you to request common due dates, etc.

PACIFIC INDEMNITY
Broker Portal

CONTACT DETAILS

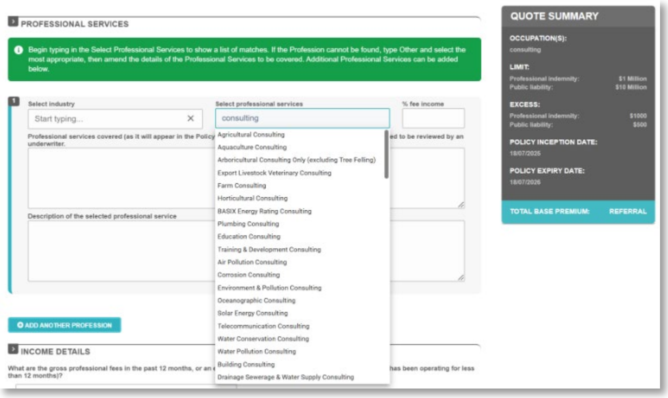
- Complete your client's (Insured's) details, including any Trading, Business or additional names
- Mandatory fields are denoted by an *
- Begin typing the suburb and select from the list to populate the Postcode and State fields



PROFESSIONAL SERVICES and BUSINESS ACTIVITIES

- Smart Search of all available Professional Services (Professional Indemnity) or Business Activities (Broadform (General) Liability)

- Start typing the professional services, or business activity, by entering a phrase that searches all words within the Professional, or Industry, description OR select the relevant professional service/s, or business activity/ies from the drop-down list

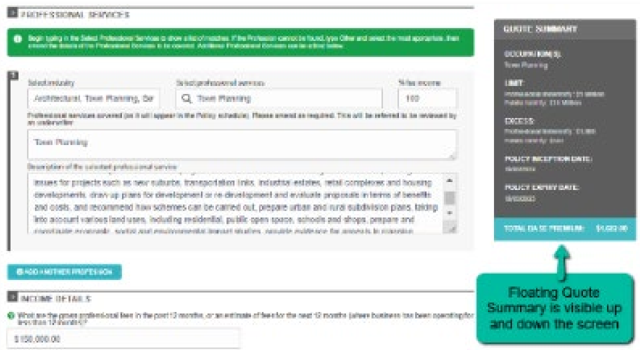


Can't find the Business Activity or Professional Service?

- Select an Industry, then select "*Other...not otherwise listed"* from the bottom of the list and provide the additional details in the box below

FLOATING QUOTE SUMMARY

- Floats' with you on screen as you enter the data
- Shows the Base Premium as you input the data; OR
- Shows Referral immediately if the quote will be required to be referred to an underwriter for review (no Premium will show at this stage)



FEE INCOME BY STATE/TERRITORY

- Tick if your client is exempt from paying stamp duty and click on BROWSE to attach the relevant exemption certificate

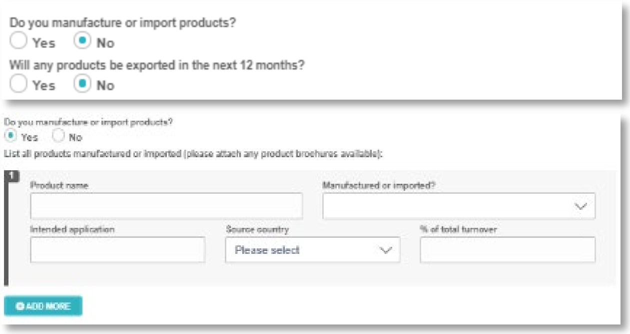
- **NSW Small Business Exemption** from Insurance Duty declaration question will appear when relevant.

  *Click on "**Yes**" if you have received a completed, signed and dated Exemption Declaration. **You do <u>not</u> need to attach the Exemption Declaration.***

DYNAMIC QUESTIONS

Additional tables or questions only appear when relevant to the selected Profession/Industry/Activity selected

Example provided for Manufacture or Import of Products (Broadform Public & Products Liability)



EXCESS SLIDER

Slide to adjust – located in both the PROPOSAL DETAILS and SUMMARY screens

A higher than standard excess will attract a discount

A lower excess may Refer for approval

ADDITIONAL COMMENTS & INFORMATION

- Enter any details that need to be declared and form part of the proposal form information
- Comments received from your client will appear in this box

Attaching Documents

- Drag & Drop, or Click to Browse, to upload documents to the proposal.

OPTIONS AT END OF PROPOSAL

- **BACK** to return to the CONTACT DETAILS page
- **SEND LINK TO CLIENT** (see below)
- **SAVE & EXIT** - Details are saved to return to at a later time
- Click **SUBMIT >** to proceed to the next page

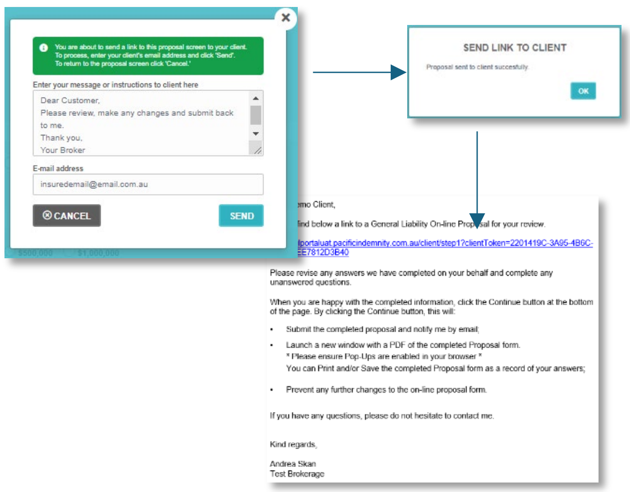
SEND LINK TO CLIENT

SEND LINK TO CLIENT

- An email will be generated that will contain a link for your client to review and edit the proposal details. You can also enter a personalised message to your client here.
- The link will be **valid for 10 days**

Your client can:

- ✓ Choose their Preferred Inception Date
- ✓ Amend proposal answers
- ✓ Save/Print a copy of their proposal when completed



- Your client's answers are **only** submitted to you (not to Pacific Indemnity)
- Once submitted by your client:
  - ✓ Their answers become Read Only
  - ✓ You will be notified via email
  - ✓ You can review and modify before submitting to Pacific Indemnity
- You can see the status of your client's proposal at any stage:

  Your client has not reviewed or returned the proposal to you:

SEARCH RESULTS

Quote Policy No.	Client Name	Policy Type	Policy Inception Date	Quote Registration Date	Status	Actions
0051261	Test [redacted]	PI/PL	20/06/2025	20/06/2025	Proposal Sent	

Your client has reviewed and returned the proposal to you. You will receive an email to notify you of this:

SEARCH RESULTS

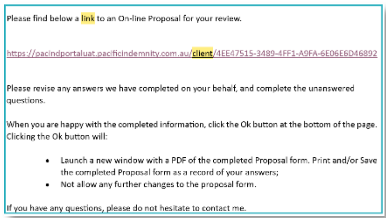
Quote Policy No.	Client Name	Policy Type	Policy Inception Date	Quote Registration Date	Status	Actions
0051457	LM Test for auto quote	PI/PL	17/07/2025	17/07/2025	Proposal Completed	

RETRIEVE PROPOSAL

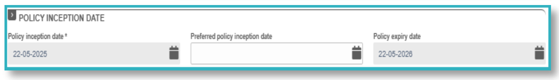
- If you need to withdraw from sending the proposal link to your client, you can click on RETRIEVE QUOTE > in the **SUMMARY** screen. This will allow you to edit the proposal details.

WHAT YOUR CLIENT SEES

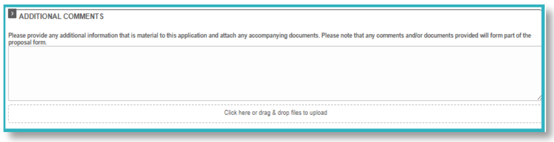
The message entered in the SEND LINK TO CLIENT window shows at the top of the email with your client's link



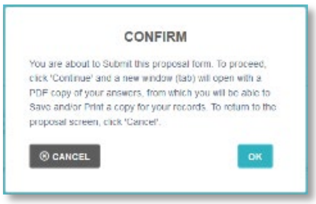
- Your client can elect a Preferred Policy Inception Date

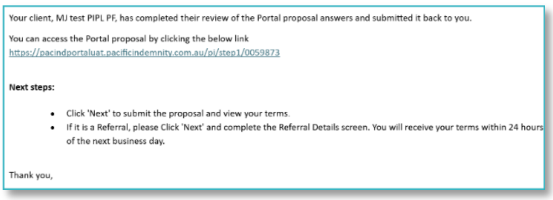


- The Proposal questions mimic those you see in the PROPOSAL DETAILS screen, **excluding** the Broker Commission slider and the floating Quote Summary
- Your client can provide further information in the ADDITIONAL COMMENTS box



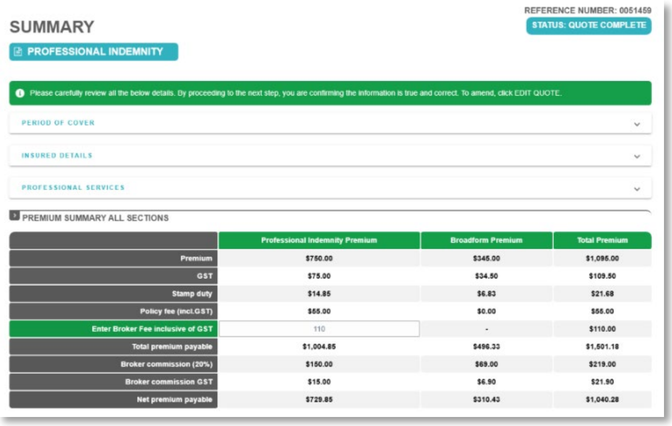
- When SUBMIT > is clicked:
  - ✓ A confirmation message appears
  - ✓ The answers become Read Only
  - ✓ A new window launches with a PDF file your client can Save or Print
  - ✓ You will be notified via email
  - ✓ You can review and modify before submitting to Pacific Indemnity





SUMMARY SCREEN

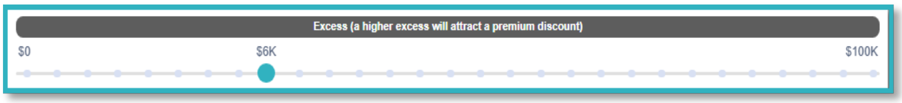
This screen summarises your quote in an easy-to-read page.



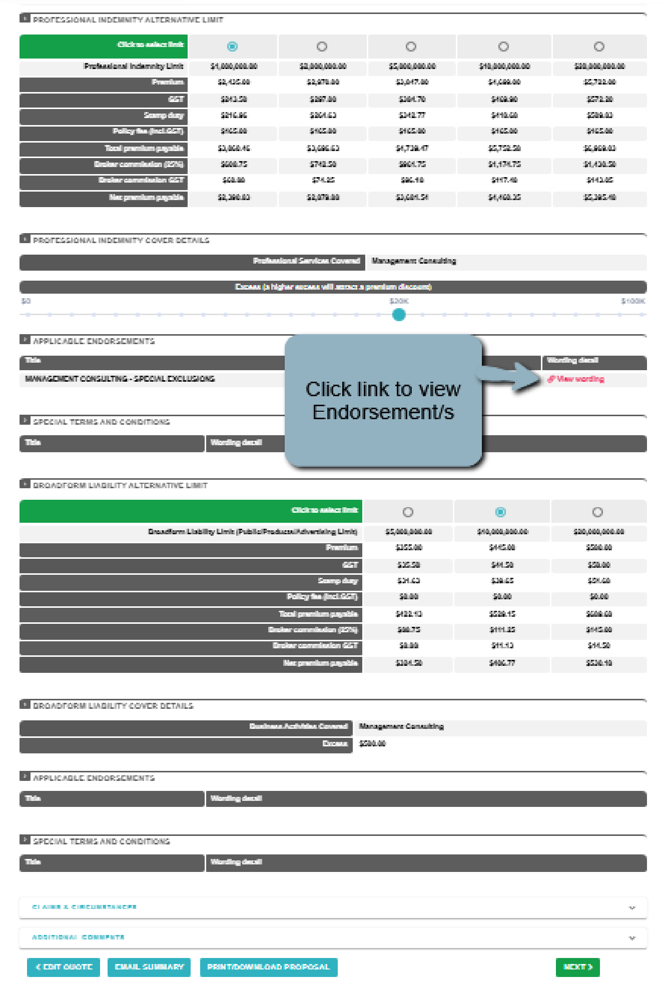
From here you can:

- Review all the answers provided in the PROPOSAL DETAILS screen
- Review REFERRAL REASONS (where applicable)
- Select the Limit option you require (including for Broadform Liability, if included with Professional Indemnity)
- Enter a Broker Fee *(inclusive of GST) to appear in your quote

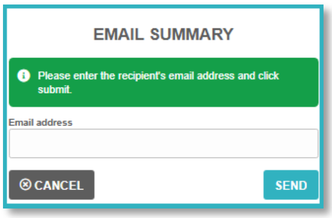
  **Not included as part of the Net Premium Payable as this is not collected by Pacific Indemnity.*
- Select alternate Excess (by using the slider) and see the premium update



- View the Applicable Endorsements and/or Special Terms & Conditions if applied



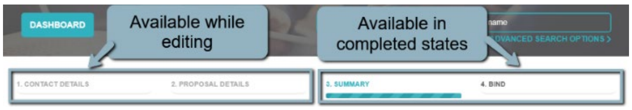
- < EDIT QUOTE to return to the CONTACT DETAILS screen to edit the details if required
- EMAIL SUMMARY is used to email a Quote summary to a nominated email address



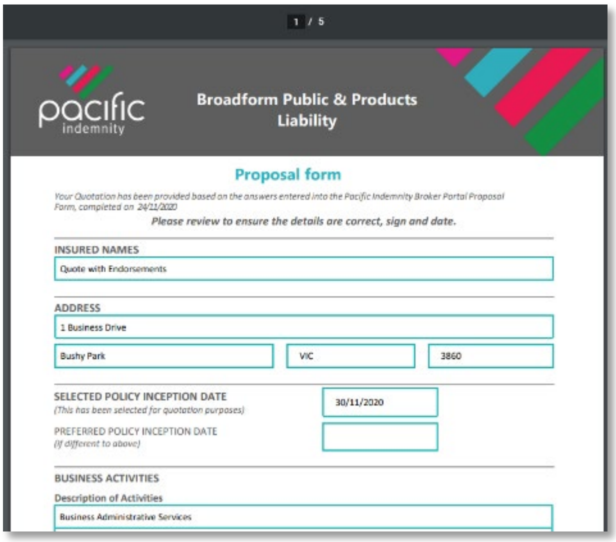
- PRINT/DOWNLOAD PROPOSAL will launch a new window with a PDF record of the portal Proposal answers. Please allow pop-ups for this website.
- NEXT > proceeds to the next screen for a formal quote and the ability to BIND Cover.

NAVIGATION AT THE TOP OF THE PAGE

Once the proposal details are completed and a quote is available, the screen headers can be used to navigate between the pages.



PRINT/DOWNLOAD PROPOSAL

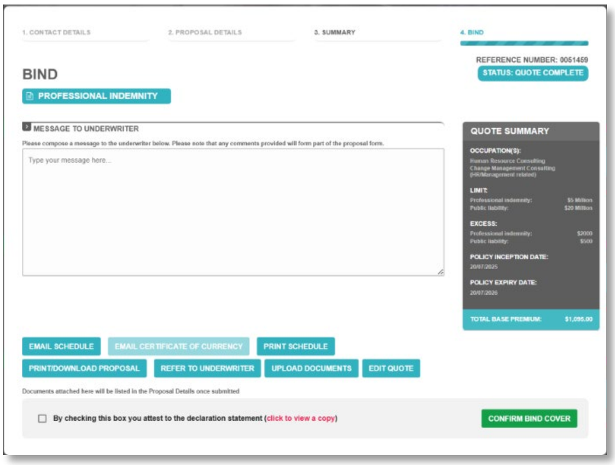


This is a record of the answers entered in the Portal Proposal Details screen that can be printed and/or saved.

This includes a declaration statement for you to gain your client's sign-off on the information provided

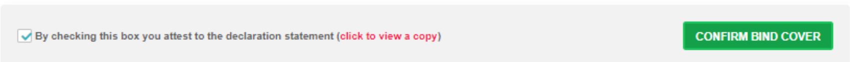
*You are **not** required to send this completed form to Pacific Indemnity*

BIND COVER

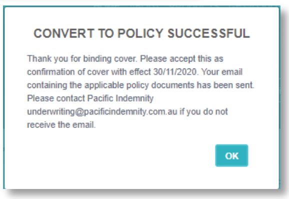


Options on this screen:

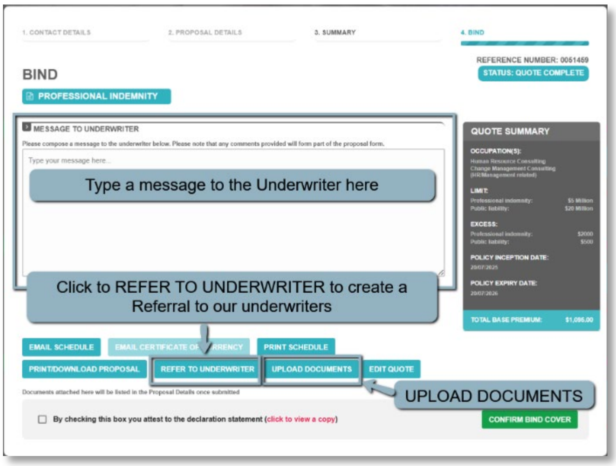
- Type a message to the underwriter for review;
- EMAIL SCHEDULE to Email the quote to a nominated email address;
- PRINT SCHEDULE to launch the quote schedule in a new window to Print or Save the quote to your files;
- PRINT/DOWNLOAD PROPOSAL to launch a new window with a PDF record of the portal Proposal answers (see the Print/Download Proposal section above);
- UPLOAD DOCUMENTS to attach any supporting documents, e.g. CV/Resume, Company Profile, Contract Details, Existing Insurer's schedule, Completed Proposal form, etc;
- REFER TO UNDERWRITER to Refer the risk to an Underwriter to review. Reasons may be:
  - the automatically generated terms are not competitive or require amending
  - additional information has been supplied e.g. company profile, contract details etc;
- 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 OR MESSAGE THE UNDERWRITER



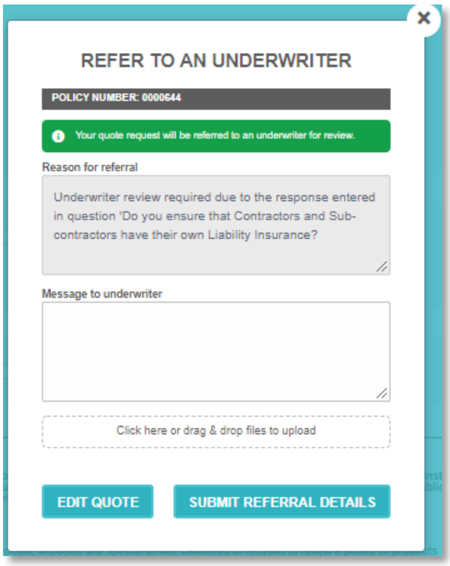
In the **BIND** screen you can elect to Refer your quote to an underwriter to review the automatically generated terms.

Reasons you may choose to Refer or Message:

- Enter a **MESSAGE TO UNDERWRITER** in the box provided with the message or information you would like the Underwriter to take into consideration when assessing the risk
- You may have additional information that you wish to attach to the submission via **UPLOAD DOCUMENTS** (ex. a company profile, contract details etc)

REFERRED QUOTES

When a quote requires referral to an underwriter, the following **REFER TO AN UNDERWRITER** screen will display:



- Reasons for referral are displayed in the Referral pop-up and subsequently on the SUMMARY screen

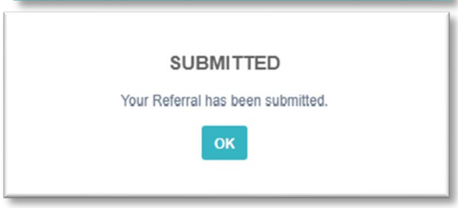
Other options available from this screen:

- EDIT QUOTE to return to the previous screen and edit the proposal information
- **Click or drag & drop files to upload** to assist with assessment of the risk

  (for example: Company Profile, claim/circumstance details, Risk Management procedures, completed proposal form, expiring schedule/details etc)

- Enter a **Message to Underwriter**, to provide any further information you feel could assist with assessment
- Click SUBMIT REFERRAL DETAILS to submit the Referral for review

  You will receive confirmation that your Referral has been successfully submitted.



An underwriter will assess and provide a response within 24 hours, on the next business day.

Your submission will have a '**Referred**' status in the Dashboard:

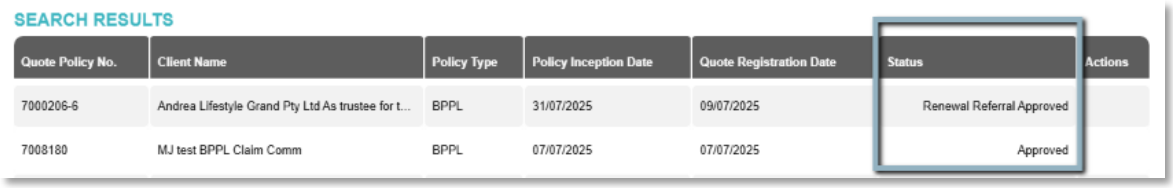
SEARCH RESULTS

Quote Policy No.	Client Name	Policy Type	Policy Inception Date	Quote Registration Date	Status	Actions
0051454-1	[redacted]	PI/PL	16/07/2026	16/07/2025	Renewal Referred	
7008211	[redacted]	BPPL	15/07/2025	15/07/2025	Referred	

APPROVED QUOTES

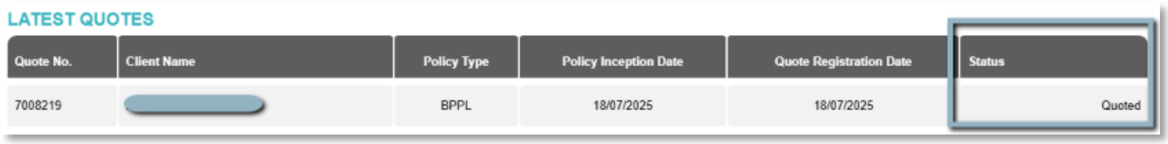
In the DASHBOARD, when a Referred quote has been Approved it will appear with a status of **Approved or Renewal Approved** for renewals

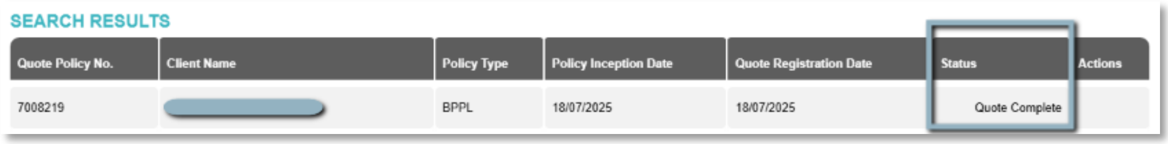
- Click anywhere in the row to open to the **CONTACT DETAILS** page, proceed through the PROPOSAL DETAILS which is editable to make any further changes, then SUBMIT to continue to the SUMMARY page



These may also be released as Quoted and will appear with a status of **Quoted** or **Renewal Quoted** for renewals. You can also use the Advanced Search to search for Quote Complete or Renewal Quoted. The underwriter may also issue the quote to you via email.

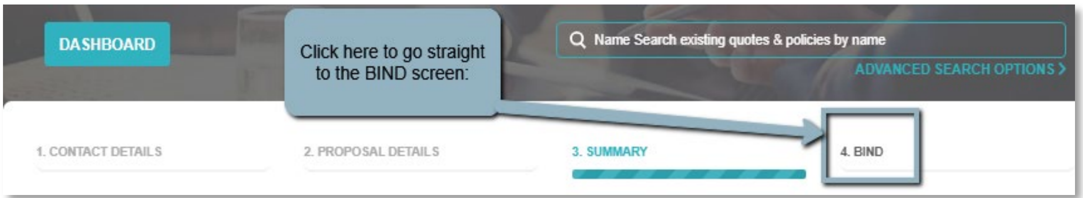
- Click anywhere in the row to open to the **SUMMARY** page





From the **SUMMARY** you have 5 options:

1. Click BIND at the top of the page to take you directly to the BIND screen:



Scroll to the bottom of the page and click one of the following:

RENEWAL QUOTES

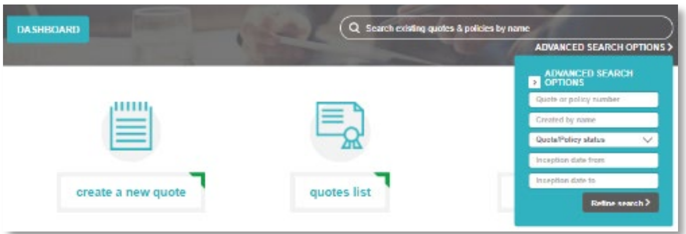
Renewal quotes can be viewed and transacted on the Portal (subject to qualifying criteria)

When a Renewal Invitation has been released accompanied with the Renewal quotation terms, the quote can be viewed and bound on the Portal. Search for Renewal Invitation Quoted via ADVANCED SEARCH OPTIONS.

SEARCH RESULTS

Quote Policy No.	Client Name	Policy Type	Policy Inception Date	Quote Registration Date	Status	Actions
0001960-7		PI/PL	30/08/2025	17/05/2025	Renewal Invitation Quoted	

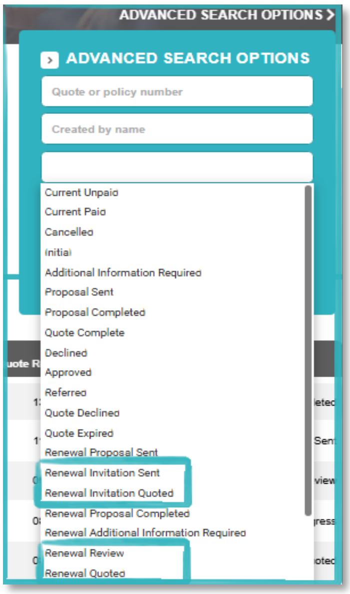
Locating Your Renewals



- In the DASHBOARD, use the Name Search bar at the top, or
- Click ADVANCED SEARCH OPTIONS
- Type the Policy Number OR make a selection in the Quote/Policy status option:

Select from:

- ✓ Renewal Invitation Sent (Invitation has been issued but not Auto Quoted)
- ✓ Renewal Review (Underwriter is reviewing)
- ✓ Renewal Quoted or Renewal Invitation Quoted (Renewal has been quoted)



- ENTER or click **Refine search** to see the Search Results

Example for Renewals Quoted:

SEARCH RESULTS

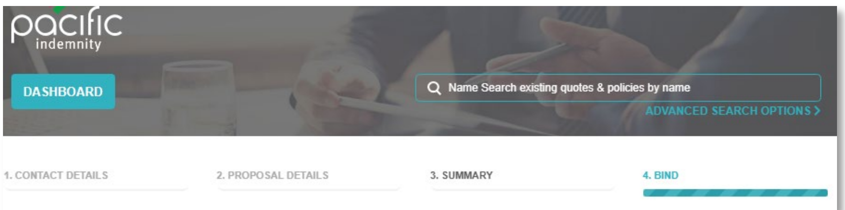
Quote Policy No.	Client Name	Policy Type	Policy Inception Date	Quote Registration Date	Status	Actions
7010080-1	LMPE Test for BPPL endorsement title	BPPL	19/05/2026	19/05/2025	Renewal Quoted	
0059824-1	MJ test WF status	PI/PL	09/05/2026	09/05/2025	Renewal Quoted	
7010078-1	MJ testing BPPL ext	BPPL	07/05/2026	07/05/2025	Renewal Quoted	

SHORTCUT TO BIND SCREEN

For completed Quotes and/or Renewal Quotes

To quickly move to the BIND screen for completed Quotes and/or Renewal Quotes :

- Click anywhere in the row to open the SUMMARY page from the Search Results
- Click **4. BIND** link in the list across the top of the page



HOW TO SEARCH

NAME SEARCH - Use the Search bar at the top to search by name

- Enter the name and the search begins instantly
- The search results are shown below

ADVANCED SEARCH OPTIONS >

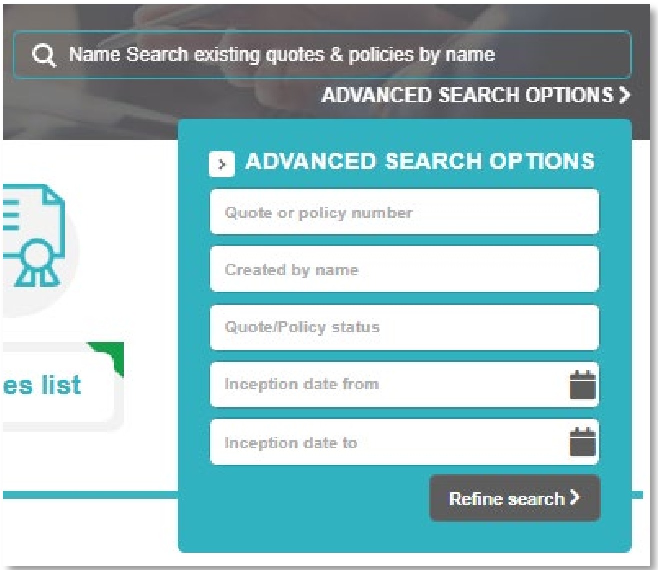
Click ADVANCED SEARCH OPTIONS > to search by:

- **Quote or policy number** (enter an * before and after the policy number to search any policy period e.g. to search policy 0000311, enter *311*)
- **Created by name** = the person who created the quote
- **Quote/Policy status**
- **Inception date from**
- **Inception date to**

Press ENTER or Click Refine search >

Click on any column or row to open the proposal pages

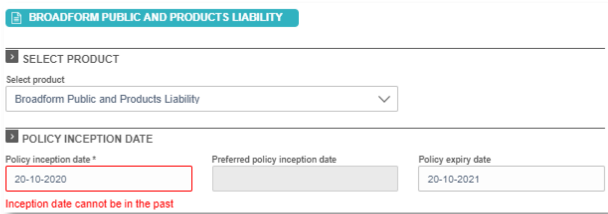
Return to DASHBOARD to clear the Search



EXPIRED QUOTES

If a quote has expired (including a renewal quote that is past the inception date of the new policy period) and you want to make it an active quote again:

- Open the expired quote or renewal quote:
  Scroll to the bottom of the Summary page and click on < EDIT QUOTE
- You will be required to adjust the Inception date to a valid date > or = 30 days from today's date
- **By clicking the** NEXT > **button, at the bottom of the Contact Details page, you are confirming the details are true and correct and this will create a valid quote for binding**
- Review the proposal information (if required) and click SUBMIT > to get an updated Binding Quote



RESENDING POLICY DOCUMENTS

- Go to **policies list**, OR
- Use the **ADVANCED SEARCH OPTION** to find the required policy:
- Accessing policies via this list allows you to email the policy Schedule and/or Certificate of Currency to the nominated email address:

In the Actions column, select from the drop down