

Broker Administrator - Placing Facilities Training Course Outline



The Aim of the Broker Administrator - Placing Facilities Training Course is to familiarise delegates with the PPL platform, and for delegates to gain practical experience of using the system. The course is an instructor led course of 2.5 hours in length. A break will be scheduled during the training. Delegates will be provided with laptops to facilitate hands on experience as they work through set scenarios.

At the end of the course, delegates will be able to:

- Navigate around the Dashboard
- Record Facility Placements on the platform which have been agreed elsewhere, using the Backload function
- Understand how to make changes to Facilities that have been registered by Backload
- Create, review and respond to Facility Firm Order Placements, including how to create Layers and Sections, if applicable
- Calculate lines, sign and close Facility Placements
- Create a Declaration
- Create an endorsement to the Facility Placement

The Learning Programme is shown below

Step	Content	Method of Learning	Approximate Timings
Introduction	<ul style="list-style-type: none"> • Introduction to Course and background of PPL • Aim/Learning Outcomes • Log in • Dashboard Navigation 	Trainer demonstration and PowerPoint presentation	20mins
Facility Firm Order	<ul style="list-style-type: none"> • Overview of all features and links • Record Facilities which have been agreed elsewhere, by using the Backload method • Create New Facility Firm Order on the platform adding Sections and Layers if applicable • How to review and action Underwriter responses to Firm Orders submitted on the platform, including line conditions and subjectivities • How to share additional information post Firm Order submission to Underwriters • Calculate lines, sign and close facility 	Delegates hands on practical / Trainer demonstration	1 hour
Declarations	<ul style="list-style-type: none"> • Create new Declaration Quote • Create new Declaration Firm Order 	Delegates hands on practical / Trainer demonstration	30mins

Endorsements	<ul style="list-style-type: none"> • Overview of all features and links • Create a new Endorsement request to a facility • Review Underwriter responses to endorsements to facilities submitted on the platform 	Delegates hands on practical/ Trainer demonstration	20mins
Close	<ul style="list-style-type: none"> • Any further questions • Feedback survey completion 	Discussion	10mins