

### Getting started

**Before completing** the onboarding form, please:

- Download the latest available version on our website; *and*
- Enable the dynamic content of the form

**SECURITY WARNING** Macros have been disabled. Enable Content

**SECURITY WARNING** Automatic update of links has been disabled Enable Content

The form contains dynamic content so that you only need to respond to questions that are relevant to you.

Follow your progress **while completing** the form

**Checklist**

Overall Onboarding progress	76%
<small>This list will automatically update to reflect your answers in the following tabs:</small>	
Your Company Details	100%
<small>Thank you for completing this section.</small>	
Your Lines	100%
<small>Thank you for completing this section.</small>	
Your Stamps	80%
<small>Thank you for completing this section.</small>	
Your User Details	25%
<small>Thank you for completing this section.</small>	

All sections turn green once complete

### 4 steps to complete the form (4 types of information we need to know)



#### 1 Your Company Details

In addition to your **general company information**, such as your registered company name, address and logo, you need to provide the following **9 points of contact**. We understand that some contacts may be the same for different roles:

##### 1. PPL Approvers

Approvers will authorise the setup of new users, if required, authorise changes to your company details or approve the configuration of new stamps - we encourage the nomination of two approvers.

##### 2. PPL Sponsor

Someone who champions and actively promotes the use of PPL within your organisation.

##### 3. PPL C-Suite

This is a senior C-level Director (CEO, CIO, COO,...) who supports the implementation of PPL in your organisation. From time to time, we organise events, such as the PPL C-Suite Breakfast where we invite your C-Suite contact and discuss various topics relevant to electronic placement.

##### 4. PPL Point of Contact

The day-to-day conduit to the PPL Team for onboarding, configuration, training and other general inquiries.

##### 5. Finance Manager

We direct all our invoicing queries and send our invoices to the Finance Manager.

##### 6. Publicity contact

The publicity contact will be listed on the PPL website alongside all the other publicity contacts. You agree that other firms may contact the Publicity Contact in relation to PPL.

##### 7. Business as usual contact (BAU)

The contact for BAU and Service Management queries.

##### 8. Data Protection Officer (DPO)

The DPO contact will be the contact for GDPR queries.

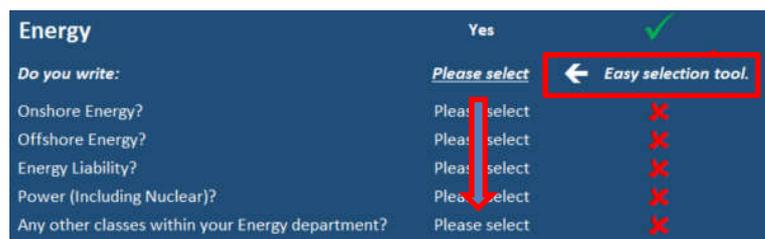
##### 9. In-house Trainer

If you have in-house training facilities, the in-house trainer is invited, from time to time, to courses ahead of significant releases.

#### 2 Your Lines

You need to tell us the **Lines and Classes of Business you write** to help us understand your company and the markets you wish to be connected to.

Our **Easy selection tool** enables you to cascade your response down to save you time



Energy	Yes
<i>Do you write:</i>	<i>Please select</i> <span style="border: 2px solid red; padding: 2px;">← Easy selection tool.</span>
Onshore Energy?	Please select <input checked="" type="checkbox"/>
Offshore Energy?	Please select <input checked="" type="checkbox"/>
Energy Liability?	Please select <input checked="" type="checkbox"/>
Power (Including Nuclear)?	Please select <input checked="" type="checkbox"/>
Any other classes within your Energy department?	Please select <input checked="" type="checkbox"/>

### 3 Your Stamps

#### Section 1: Your Stamps setup

**No:**

The stamp number is only used to help you assign stamps to full-binding users “**Your User Details**”.

**Display Name (max. 250):**

The stamp display name usually reflects the wet stamp. The number of characters allowed is limited to 250. There are a few rules that govern the setup of company, syndicate, consortium, coverholder or non-standard stamps. Please contact [PPEnquiries@loyds.com](mailto:PPEnquiries@loyds.com) if you are unsure of if you need additional guidance with the setup of your stamps.

**DUNS:**

We need to know the DUNS number pertaining to your stamps’ legal entity. If you are unsure of your DUNS number, please refer to the dun&bradstreet website <https://www.dnb.co.uk/duns-number.html>

**Stamps identifiers:**

Lloyd’s code, Lloyd’s Brussels (LBS) code, LORS code, LIRMA code and/or ILU code are all unique identifiers that we use to setup your stamps on PPL.

**Permitted Territory:**

When brokers select their carriers, they are presented with a territory stamp permission field. This enables them to filter the stamp list they are presented with. If a reinsurance broker does not need to apply a permission, they can override the filter. [For more information on Permitted Territories, please refer to Section 3: Key to Permitted Territory on your onboarding form](#)

#### Section 2: PPL / SDC Integration

- If you have signed up to SDC, are an SDC subscriber and wish to send messages to SDC via PPL, you can select your SDC configuration preference (A, B or C);
- If you are not signed up to SDC or if you are signed up but prefer to send your messages to SDC manually, select option D – nothing is sent to SDC.

Full configuration preferences are listed on the onboarding form.

#### Section 3: Key to Permitted Territory

There are 6 options available:

1. Worldwide;
2. EEA & UK;
3. Worldwide & UK but excluding EEA;
4. UK only;
5. EEA only; or
6. Worldwide incl EEA but excluding UK.

Please refer to this section on the form for full Permitted Territory details.

### 4 Your User Details

In this section you need to **list your teams**, your **users and their roles**, as well as the team(s) each user belong to.

You can setup **as many teams as you like** and **users can belong to multiple teams**. Users who will need an overarching view of several or all teams, because they place business from multiple teams or for MI purposes for instance, will need to be members of all the teams they need to see.

#### Teams

**1. Team Name:**

The team name can be a Line of Business (Marine Team) or a Location (London)

**2. Team Email:**

Add if your team has an email address. Not all teams have a team email.

**3. Team visible to brokers:**

If the team is visible to brokers, brokers have the **ability to send quotes to a team** rather than an individual user. **Firm order, declarations and endorsements are always sent to individual users.**

**4. Cover Written:**

We need details of the cover(s) placed by the team even if the team name is self-explanatory.

**5. Email Notification:**

Quote Email notifications can be sent to a team, to an individual user or to both.

#### Users

**Roles:**

**1. Full-Binding:**

Able to edit and send quotes/firm-order/endorsement responses.

**2. Read-Only:**

Cannot edit or send responses, but all can be viewed.

**Extra Roles**

**1. Internal Approver:**

Allows an underwriter to **select a user with the internal approver extra role to review the risk** before sending to the market.

**2. Super user:**

Super users can have the Full-Binding or Read-Only primary role. The Super user extra role provides **additional visibility** in that super users belongs to all teams.

Super users also have the **ability to download their PPL company configuration.**