

Amend a Facility when one of the stamps is disabled

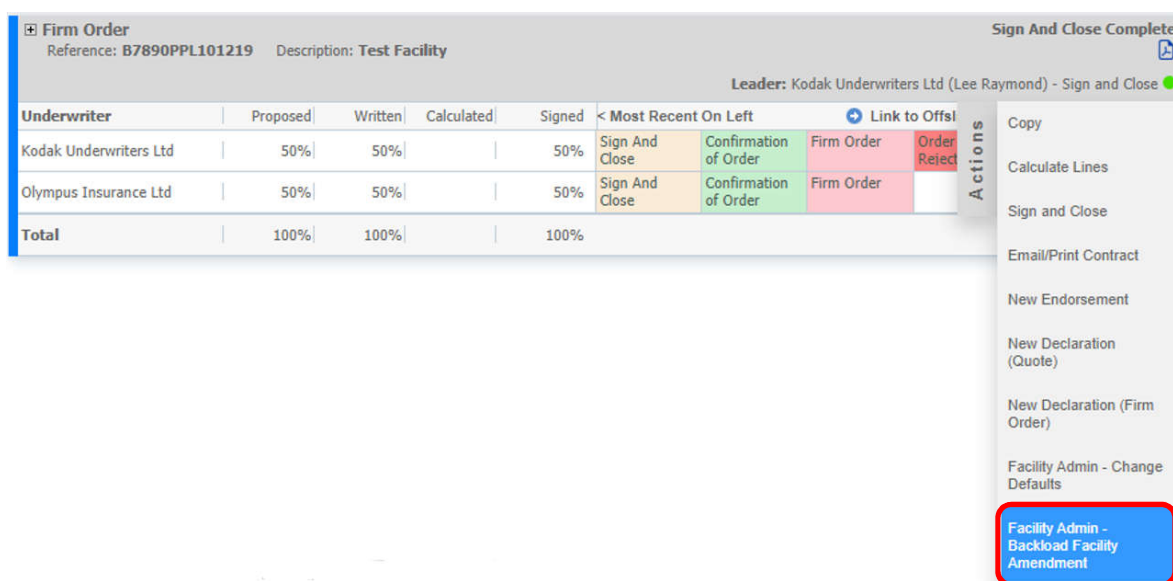
Guidelines

Question

How can I replace a disabled stamp with an active stamp on a facility?

Answer

The stamp can be amended on the Facility by invoking the **Facility Admin - Backload Facility Amendment** functionality. This functionality is available in the “Actions” menu to brokers with the “Facility Admin” additional role.



Firm Order
Reference: B7890PPL101219 Description: Test Facility
Leader: Kodak Underwriters Ltd (Lee Raymond) - Sign and Close

Underwriter	Proposed	Written	Calculated	Signed	Sign And Close	Confirmation of Order	Firm Order	Order Reject
Kodak Underwriters Ltd	50%	50%		50%	Sign And Close	Confirmation of Order	Firm Order	Order Reject
Olympus Insurance Ltd	50%	50%		50%	Sign And Close	Confirmation of Order	Firm Order	
Total	100%	100%		100%				

Actions

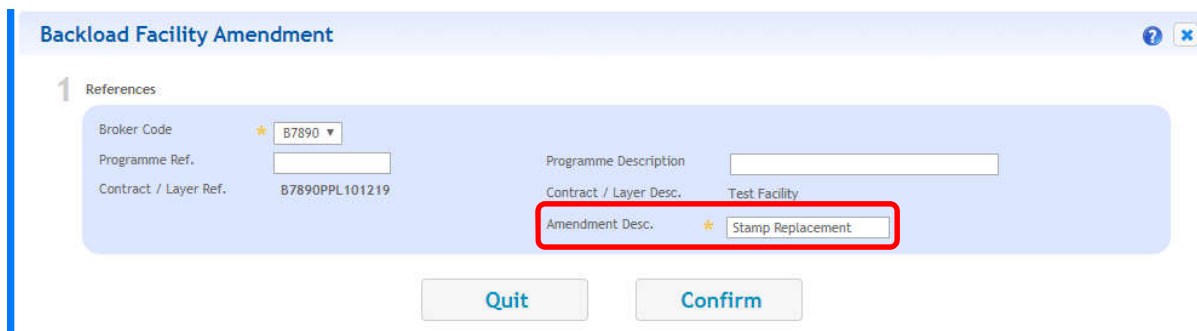
- Copy
- Calculate Lines
- Sign and Close
- Email/Print Contract
- New Endorsement
- New Declaration (Quote)
- New Declaration (Firm Order)
- Facility Admin - Change Defaults
- Facility Admin - Backload Facility Amendment**

Backload Facility Amendment

When invoked (via the **Facility Admin – Backload Facility Amendment** action in the *Placement Overview* screen) the *Backload Facility Amendment* screen is opened.

Amending a Facility creates a new Facility version.

You must provide a mandatory **Amendment Description**, after which clicking Confirm will take you to the *Backload Facility* screen.



Backload Facility Amendment

1 References

Broker Code: B7890

Programme Ref.: []

Contract / Layer Ref.: B7890PPL101219

Programme Description: []

Contract / Layer Desc.: Test Facility

Amendment Desc.: Stamp Replacement

Buttons: Quit, Confirm

- ❶ On the *Backload Facility* screen, scroll down to Stamps under Section 5 Underwriters and reset the inactive stamp to remove the UW response
- ❷ If the stamp being replaced is in a different organisation, Add Underwriter and select the appropriate stamp

Backload Facility

5 Underwriters

Stamp Permission ★ Exception/Override ▼

❷ Add Underwriter/Facility

Section:

Underwriter Notes and Document Permissions

Underwriter

Kodak Underwriters Ltd Backload Edit Response Reset

Documents

- PPL Test MRC 2018.doc Placing Slip
- Loss Record.xls Loss Record
- Insurable Values.xls Insurable Values

Olympus Insurance Ltd Backload Edit Response Reset

Documents

- PPL Test MRC 2018.doc Placing Slip
- Loss Record.xls Loss Record
- Insurable Values.xls Insurable Values

Stamps

Open Market Total Written 100.000000 % Include

Bound : Kodak Underwriters Ltd (Lee Raymond)	Edit Response	Reset	50%	<input checked="" type="checkbox"/>
Stamps	Slip Lead	Lloyd's Lead	XIS Lead	LIC S.A. Lead
<input checked="" type="checkbox"/> Lloyd's Underwriter Syndicate No. 2341 KOD, London, England	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Bound : Olympus Insurance Ltd (Howard Paley)	Edit Response	❶ Reset	50%	<input type="checkbox"/>
Stamps	Slip Lead	Lloyd's Lead	XIS Lead	LIC S.A. Lead
<input checked="" type="checkbox"/> Lloyd's Underwriter Syndicate No. 1234 OLY, London, England	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		

Save Save & Quit

Reset Backload for Olympus Insurance Ltd

Please select 'Reset' to proceed

⚠ Please note.
By proceeding, all risk codes and associated references will be removed.
For a Lloyd's leader, all risk codes and associated references will be removed for the following markets.
Settlement Terms will be removed if the section Underwriter is a Bureau lead.
If applied at Underwriter level, only the section Underwriter response and Broker request for the section will be deleted.
If applied at Company level, the whole Company is reset back to draft (for every applicable section).

Quit ❶ Reset

- ③ Add response for the replaced organisation/stamp to mark this has been agreed by the carrier;
- ④ Save and quit

Stamps

Open Market		Total Written 100.000000 %	Include
Bound: Kodak Underwriters Ltd (Lee Raymond)	Edit Response Reset	50%	<input type="checkbox"/>
Stamps	Slip Lead Lloyd's Lead XIS Lead LIC S.A. Lead		
<input checked="" type="checkbox"/> Lloyd's Underwriter Syndicate No. 2341 KOD, London, England	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>		
Firm Order: Olympus Insurance Ltd (Georgina Breese)	Add Response Reset	50%	<input checked="" type="checkbox"/>
Stamps	Slip Lead Lloyd's Lead XIS Lead LIC S.A. Lead		
<input checked="" type="checkbox"/> Lloyd's Insurance Company S.A. OLY 5432; Reinsured by Lloyd's syndicate OLY 1234	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>		

[Save](#) [④ Save & Quit](#)

Finally, the amendments need to be:

- Signed and closed; and
- Published.

Once the Backload Facility has been published, it will become active and will be visible to the Facility Panel.

Should you wish to alert all Underwriters participating on the Facility Panel, please select Publish and Notify. To publish without sending notifications, please select Publish.

Please refer to the **Functional User Guide for Brokers**:

- Section 5.3.5 [Backload Facility Amendment](#) for full details on how to amend a facility;

Please always contact Ebix Support for assistance:

PPLSupport@ebix.com or on

+44 (0)207 264 0880

Monday - Friday 08:00 - 20:00

UK Time except UK Bank Holidays