

PLACING PLATFORM LIMITED FREQUENTLY ASKED QUESTIONS



Table of Contents

1	General Platform usage	
1.1	How do I retrieve my username?.....	2
1.2	How do I retrieve my password?	2
1.3	How can I search for a risk?	2
1.4	I've sent the contract via PPL but I've not received the auto-generated email yet?	3
2	Underwriter – Firm Order.....	3
2.1	Where has my Firm Order Acceptance gone?	3
2.2	How do I reassign Risks/Endorsements to agree?.....	4
2.3	How can I get new Line Conditions added to PPL?	4
2.4	How can I change my Underwriting references after I have responded?	5
2.5	Can I amend my settlement information?.....	5
2.6	My subjectivities have expired, what do I do?	5
2.7	I am trying to accept a Firm Order but am unable to submit my response?.....	6
2.8	Do I need to copy my underwriter References to an Endorsement that I create from a bound Firm Order?	6
3	Broker – Firm Order	6
3.1	Can I change an Underwriter in a Firm Order?	6
3.2	How do I select my Lloyd's/Slip lead?	7
3.3	Can I create Firm Order Sections?	7
3.4	Can I edit the MRC after I've sent the Firm Orders?.....	7
3.5	I'm getting 'Inactive Users', why is this?.....	8
3.6	How do I respond as an Offline Market??	8
3.7	Can I increase/reduce an underwriter's line once they've accepted?	8
3.8	How do I action a Subjectivity?.....	9
3.9	I've agreed to meet the Subjectivity Deadline, how do I show it as satisfied on the platform?	10
3.10	What do I do if the Subjectivity Deadline Date has expired?	11
3.11	Can I reject a Line Condition(s)?	11
3.12	I'm unable to Sign and Close, where has the button gone?	12
3.13	How do I print my own endorsement Completion email?	12
3.14	I am trying to Cancel & Replace but am unable to?	12
3.15	I receive an error when using PPL.....	12

PLACING PLATFORM LIMITED FREQUENTLY ASKED QUESTIONS



3.16	I am trying to Cancel/NTU and Endorsement, but the option isn't available?.....	13
4	Broker – Endorsements	13
4.1	Can I add/remove underwriters when creating a new endorsement?	13
5	Underwriter – Endorsements	14
5.1	Endorsement Acceptance not in my Inbox?	14
5.2	Does the Agreed Elsewhere Response on Endorsements respond to the broker?.....	14

1 General Platform Usage

1.1 How do I retrieve my username?

To generate a username reminder, click on the “Forgotten Username?” link from the login page.



FIGURE 1 PPL LOGIN SCREEN

This will prompt you for your **Email Address**.

An email containing your Username will be sent shortly afterwards.

1.2 How do I retrieve my password?

To reset your password, click on the “**Forgotten Password?**” link from the login page (see Figure 1 PPL Login Screen). This will prompt you for your **PPL Username** and an email containing a generic password will be sent shortly afterwards. You will be prompted to update this to a **secure password**.

1.3 How can I search for a risk?

When logged into PPL you can use the search option at the top of the **Placement Summary page**, which will allow you to search on the **insured name, UMR or Insured/layer descriptions**.

PLACING PLATFORM LIMITED FREQUENTLY ASKED QUESTIONS

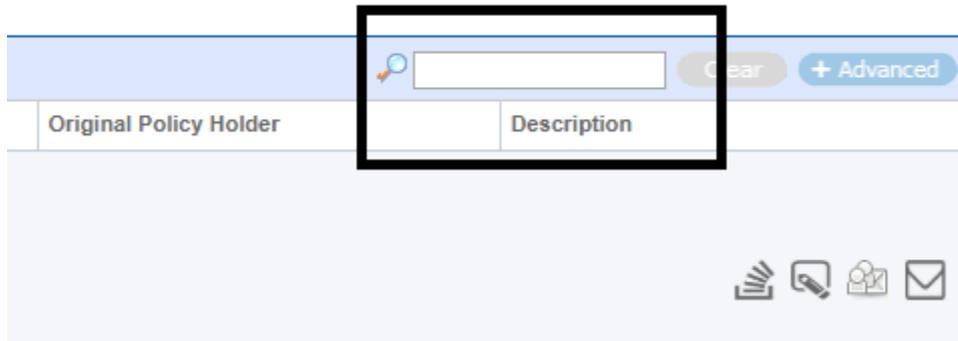


FIGURE 2 SEARCH BOX

1.4 I've sent the contract via PPL but I've not received the auto-generated email yet?

If the email requested from the platform is too large, usually due to the size of the attachments, then it may be delayed or the e-mail might not be received if its size exceeds your mailbox server restrictions.

If an email isn't received, you are able to download the documentation from the platform. If you select **Email/Print Contract** and then click on the **Print PDF** link below each print option, the document will download instantly.

Printing / Email Options

Print Security Options



FIGURE 3 PRINT DOCUMENT

2 Underwriter – Firm Order

2.1 Where has my Firm Order Acceptance gone?

If you are unable to find a firm order that has been sent it could be because it is with a colleague within a different team.

If you are not able to agree a firm order, but are able to find it, then your account may not have all the correct permissions to do this.

PLACING PLATFORM LIMITED FREQUENTLY ASKED QUESTIONS



2.2 How do I reassign Risks/Endorsements to agree?

There is **no need to reassign a risk** that has not been sent to you directly. Instead, from your dashboard, click on the **team inbox** and you will be able to action any items in there providing you're in the same team as a colleague who has been sent the risk.

	Own	Team
Actions Required	703	876
Quotes Require Response	93	139
Firm Orders Require Response	392	502
Subjectivities Require Response	116	120
Line Conditions Require Response	12	12
Revise Line Proposal Requires Response	4	6
Correction Requests and Notifications	86	86
Firm Order require approval	0	11

FIGURE 4 ENDORSEMENT TEAM LIST

To reassign to a different colleague, you must **select their name** from the available dropdown. You can also type a message to them if required. Once you click **Confirm**, your colleague will receive an alert informing them of the Placement/Programme that you have assigned to them.

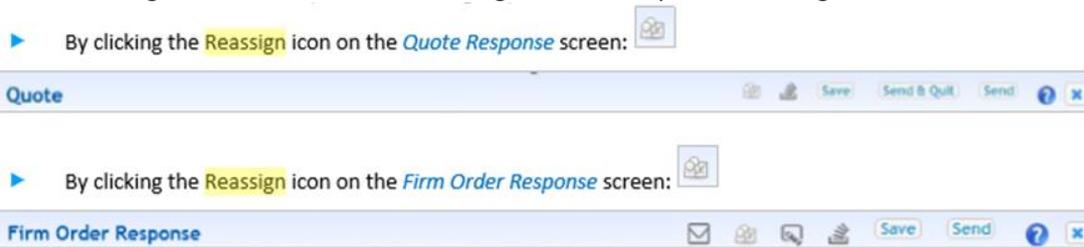


FIGURE 5 REASSIGN OPTIONS

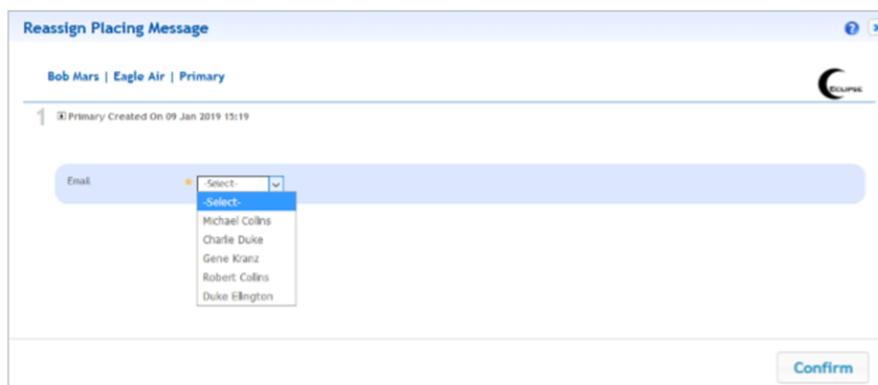


FIGURE 6 REASSIGN PLACING MESSAGE

2.3 How can I get new Line Conditions added to PPL?

You can add new line conditions by contacting the **EBIX helpdesk** via PPLSupport@ebix.com or by calling + 44(0)20 7264 0880

PLACING PLATFORM LIMITED FREQUENTLY ASKED QUESTIONS



2.4 How can I change my Underwriting references after I have responded?

You are able to amend your references post bind at any time. Go to the Placement Overview for the risk and select Manage in the Actions, change your references and then select Send. An alert will be sent to the broker.

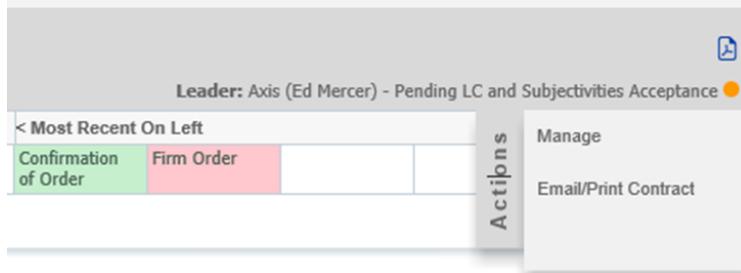


FIGURE 7 MANAGE PLACEMENT

2.5 Can I amend my settlement information?

You can amend settlement details and your references / risks codes at any stage post bind. Go to the Placement Overview for the risk and select **Manage** in the **Actions** slider (see Figure 3 Manage Placement), change the required details and then click on **Send**. An alert will be sent to the broker.

2.6 My subjectivities have expired, what do I do?

If the deadline expires on a subjectivity then you will need to extend this in order to allow the broker to accept these. Go to the Placement Overview for the risk and select **Review Subjectivities/LCs** in the Actions slider.

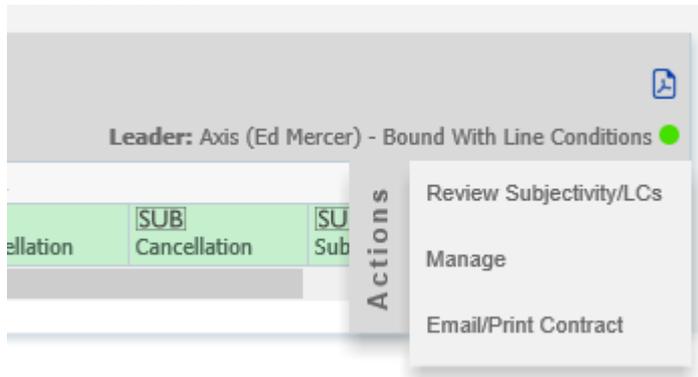


FIGURE 8 REVIEW SUBJECTIVITY/LCS

Then select **Extend Deadline** and **Edit** which is next to the **Deadline** Date. If you select the **Remove Line** when a subjectivity has expired then you will be completely removed from the risk with no option for the broker to add you back in.

PLACING PLATFORM LIMITED FREQUENTLY ASKED QUESTIONS



5 [-] My Response

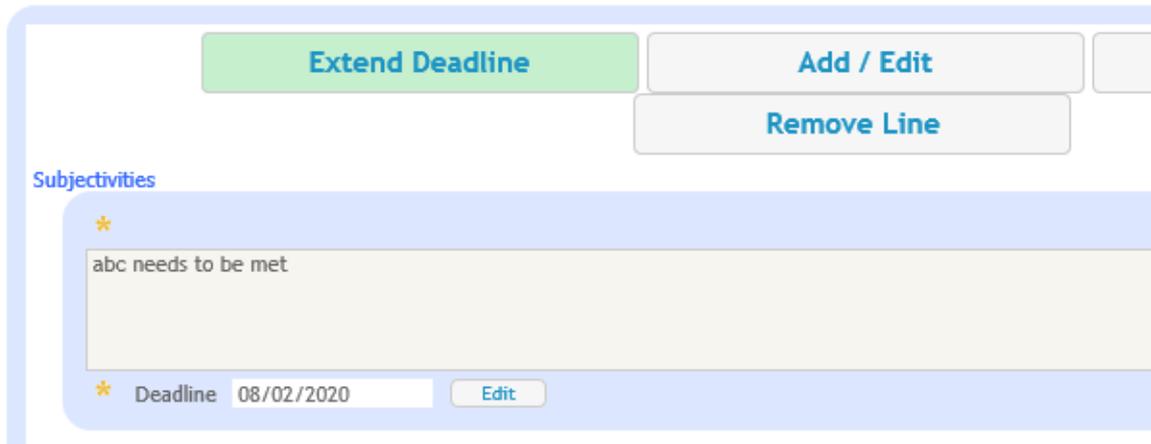


Figure 9 EXTEND DEADLINE AND REMOVE LINE

2.7 I am trying to accept a Firm Order but am unable to submit my response?

If you are working on a laptop, the screen resolution settings may mean you not able to see the submit button. You will need to scroll down to see and use the submit button. Alternatively use the tab button on the keyboard to navigate to this.

2.8 Do I need to copy my underwriter References to an Endorsement that I create from a bound Firm Order?

No. underwriter references entered on the Firm Order are automatically copied from the Firm Order to the Endorsement as it is created.

3 Broker – Firm Order

3.1 Can I change an Underwriter in a Firm Order?

If you need to amend the underwriter on a firm order then make sure there are no firm orders outstanding for the underwriter (by withdrawing). Select **Add/Remove UW** and then along the bottom you will see the **'head and shoulders'** icon to the left of the current underwriter's name. Select the icon and change the contact by typing in their name.

A bound non-lead line can be removed using the Corrections – Cancel Line function.



FIGURE 10 HEAD AND SHOULDERS ICON

PLACING PLATFORM LIMITED FREQUENTLY ASKED QUESTIONS



3.2 How do I select my Lloyd's/Slip lead?

After selecting the stamps for the underwriter there are check boxes enabled to the right which allow you to select the leader type for that stamp.



FIGURE 11 LEADER ROLE SELECTION

If you have multiple different leaders across stamps then when you proceed to the next page you will be asked to select a Bureau Leader.

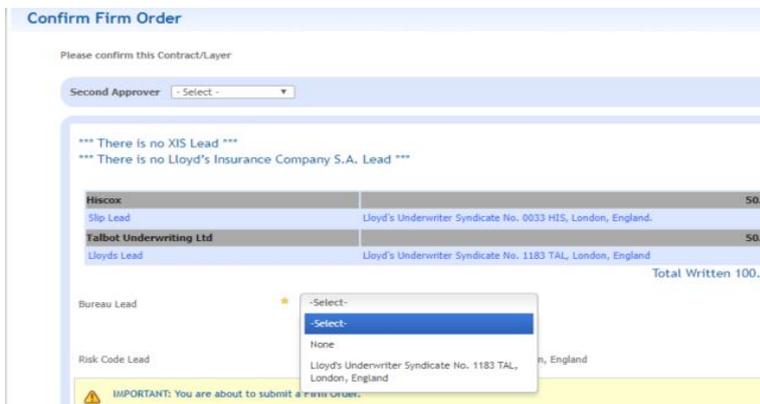


FIGURE 12 SELECT BUREAU LEAD

3.3 Can I create Firm Order Sections?

Yes, you should add your sections onto your firm order prior to submitting the request (although these can be added prior to any underwriters binding the risk). These can be added within the **Prepare Firm Order** screens by selecting the **Add Sections** button.

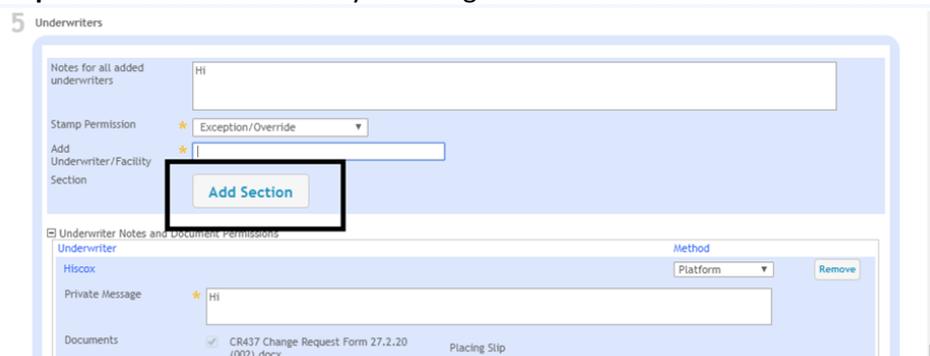


FIGURE 4 ADD SECTION

3.4 Can I edit the MRC after I've sent the Firm Orders?

If there are no bound underwriters you will be able to amend all details on the firm order (including all documentation) except for the UMR. First you will have to **Withdraw** and then select **Edit Contract** in the **Actions** slider.

PLACING PLATFORM LIMITED FREQUENTLY ASKED QUESTIONS

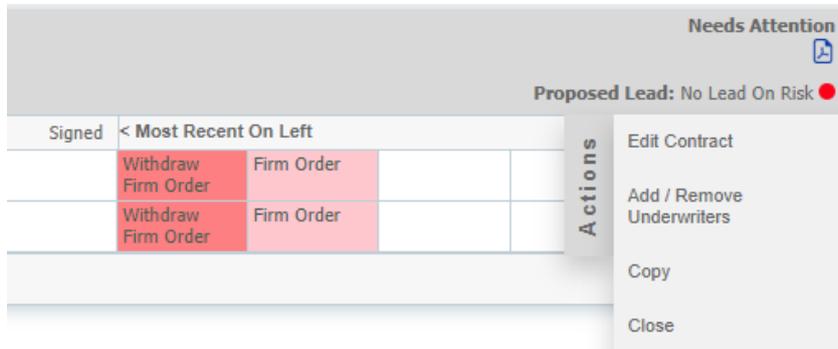


FIGURE 14 EDIT CONTRACT

If any parties are bound then it will be necessary to use either the **Correction function** to make changes or by endorsement.

3.5 I'm getting 'Inactive Users', why is this?

If you see any inactive users on a risk or endorsement then this might be due to the underwriter leaving the company, or not having the access to the stamp that was previously used. If this is the case, please remove the underwriter and add someone else. You might find you can add the same underwriter if their configuration has changed to give them the required stamp access.

3.6 How do I respond as an Offline Market??

When you have added an offline market, you need to enter in their response. To do this go into the **Add/Remove Underwriter** option in the **Action** slider. Then scroll down to the **Underwriter Notes and Document Permissions** section and you will see an **Add Response** button next to the offline market. Select this and you can enter their acceptance or rejection details.

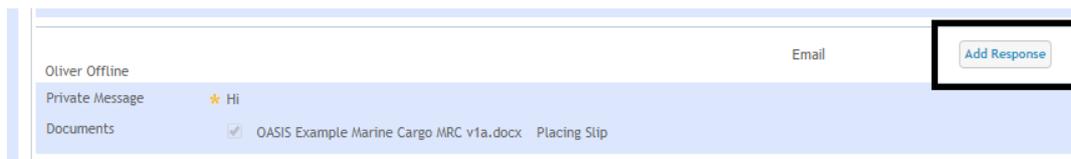


FIGURE 15 ADD RESPONSE BUTTON

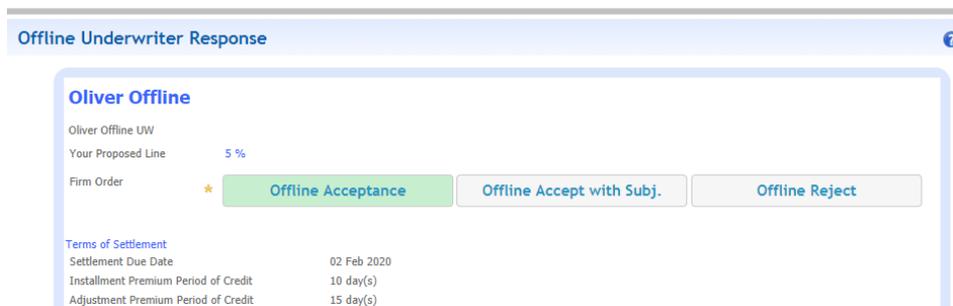


FIGURE 16 SELECT OFFLINE MARKET'S RESPONSE

3.7 Can I increase/reduce an underwriter's line once they've accepted?

PLACING PLATFORM LIMITED FREQUENTLY ASKED QUESTIONS



Yes, before a risk is signed and closed you are able to increase an underwriter's bound line. Click on the **Review Bound Lines** option in the Actions slider, select the **Include** checkbox for the lines you wish to revise and a **Proposed %** box is enabled where you can enter the new line. The underwriter will need to accept this for it to update.

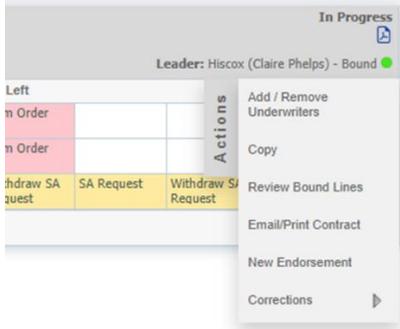


FIGURE 17 REVIEW BOUND LINES

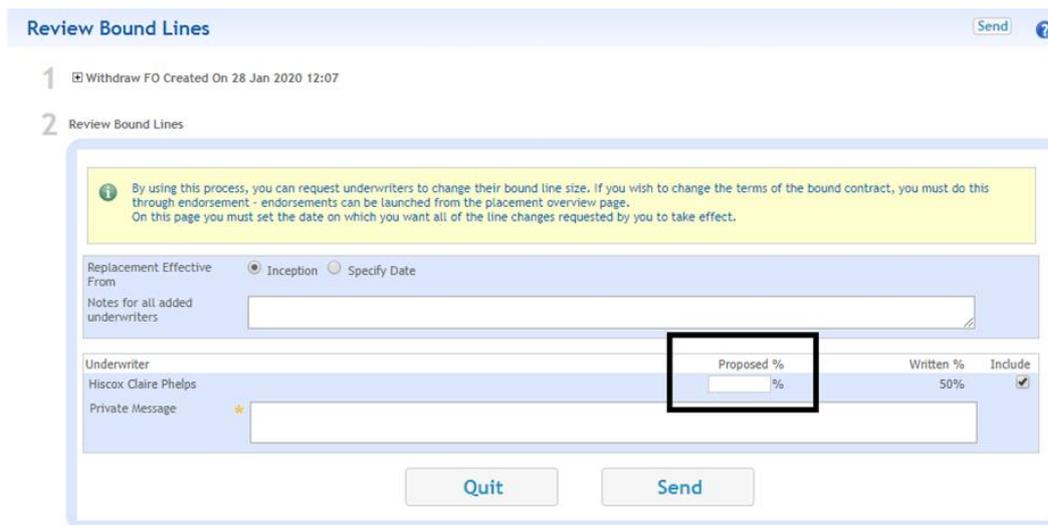


FIGURE 18 ENTER REVISED LINE

An underwriter's line may be reduced if the placement is over-subscribed, as part of the broker's sign & close process.

3.8 How do I action a Subjectivity?

As a broker you can **“Accept”** the subjectivity, **“Negotiate”** to request the underwriter to amend the subjectivity or **“Reject”**, which will remove the underwriter's line on the Firm Order.

The underwriter is not bound on the risk until the broker accepts the subjectivity conditions imposed.

PLACING PLATFORM LIMITED FREQUENTLY ASKED QUESTIONS



To action the Subjectivity locate the relevant underwriter in in the Placement Overview, and click into the link that says “**Subjectivities/LCs**” and the **Firm Order Confirmation with Subjectivities** page will be displayed.

Firm Order Resubmission Reference: B9875070220205 Description: Con desc						
Underwriter	Proposed	Written	Calculated	Signed	< Most Recent On Left	
Atrium	15%	15%			Confirmation of Order	Firm Order Resubmis
Ayis	10%	10%			LC	LC
Subjectivities/LCs					Conditional	Condition
Beazley	20%				LC	Firm Order
Subjectivities/LCs					Conditional	
MSCOX	30%	30%			[SUB]	[SUB]
Subjectivities/LCs					Subjectivity	Subjectivi
Talbot Underwriting Ltd	5%				[SUB]	Firm Order
Subjectivities/LCs					Conditional	
Tokio Marine Kiln Syndicates	30%				Firm Order	
Total	110%	55%				

FIGURE 5 SUBJECTIVITIES/LCS LINK

Firm Order Confirmation with Subjectivities/LCs

Business Type: Direct

2 Message from Underwriter

Accepted with Subjectivities / LCs Off Cover from Inception
Proposed Line: 20.00% Written Line: 20.00%

Stamp	Reference	Description	Leader Type	Written Line
Lloyd's Underwriter Syndicate No. 0033 HIS, London, England.	ffh,jfh,j			Not responded

3 Subjectivities and Line Conditions

Subjectivities	Open
Ensure sprinklers and fire alarms fitted within 30 days	Open

4 My Response

Accept Negotiate Reject

FIGURE 6 FIRM ORDER CONFIRMATION WITH SUBJECTIVITIES

In section 3, you will be able to identify which subjectivity has been set. Review the information which should contain;

- The condition to be met and by whom
- Terms that apply until the condition is met
- Consequences if the subjectivity is not met
- Deadline date if applicable.

Select the appropriate response button (If you select **Negotiate** or **Reject** you will have to add a note for the underwriter), enter your password and then select **Send**.

3.9 I've agreed to meet the Subjectivity Deadline, how do I show it as satisfied on the platform?

PLACING PLATFORM LIMITED FREQUENTLY ASKED QUESTIONS



In order to satisfy a subjectivity with a deadline date, select the “**Subjectivities/LCs**” link, and then select the **Satisfied** checkbox. You can then attach documents and write a note to the underwriter.

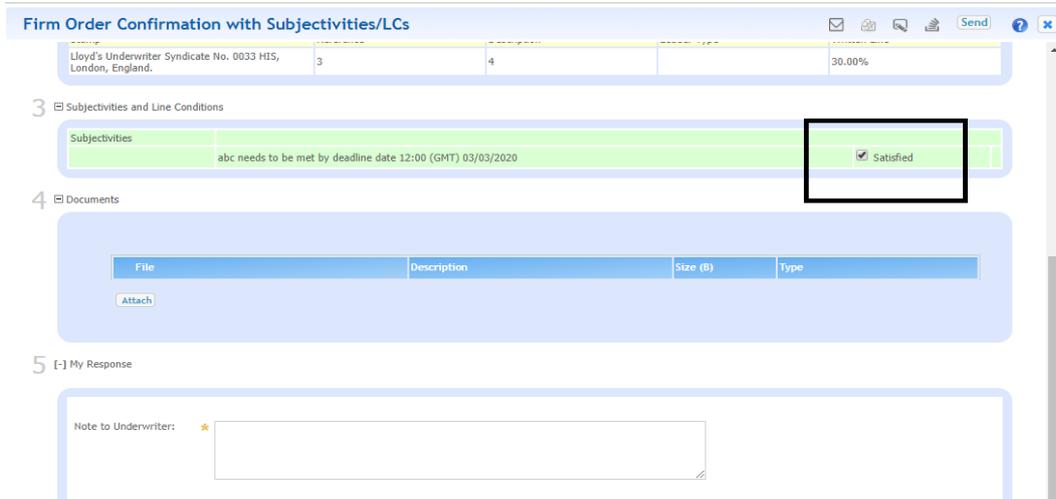


FIGURE 21 SATISFIED SUBJECTIVITIES

3.10 What do I do if the Subjectivity Deadline Date has expired?

Underwriters have the ability to record a subjectivity deadline date in the Platform using a subjectivity calendar. If this has been selected there will be “**Deadline date: DD/MM/YYYY**” displayed to the right-hand side of the subjectivity wording.

This date is monitored by the Platform and will trigger email notifications if it has not been satisfied 5 days prior to the deadline date. If the deadline date elapses then it will be down to the underwriter to extend these subjectivity deadline dates in order for you to be able to satisfy these. A deadline expiry reminder will continue to be sent daily thereafter until satisfied. If not satisfied, the broker will receive a message the day after expiry confirming it has expired.



FIGURE 22 SUBJECTIVITIES DEADLINE DATE

3.11 Can I reject a Line Condition(s)?

Yes, once the underwriter has accepted a firm order with line conditions you can reject. Select ‘**Subjectivities/LC’s**’ in the Placement Overview and then select the appropriate response.

Remember if you reject then you’ll need to send the firm order out again.

PLACING PLATFORM LIMITED FREQUENTLY ASKED QUESTIONS



4 [-] My Response



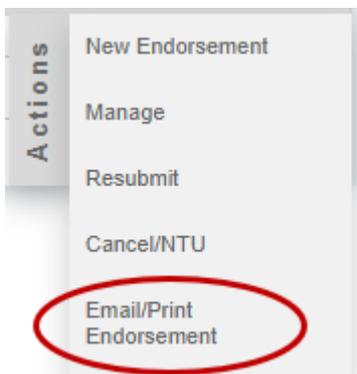
FIGURE 23 SUBJECTIVITY/LINE CONDITION RESPONSE

3.12 I'm unable to Sign and Close, where has the button gone?

If the **calculate lines** and **sign and close** option are not showing then you will need to check that there are no outstanding line conditions or any offline responses needing to be entered before you can close. Alternatively, you'll need to have a calculated line of 100% or below.

3.13 How do I print my own endorsement Completion email?

Since 3.17 went live you can now click on Email/Print Endorsement option from the Actions tab when in the endorsement placement overview.



3.14 I am trying to Cancel & Replace but am unable to?

The Cancel & Replace function is available throughout the Firm Order process, subject to configurable permissions set by your organisation, along with other standard restrictions imposed by the platform (see the "Information" tab in the Corrections options for further detail). Therefore, the C&R option will only be available for selection when permitted to use.

3.15 I receive an error when using PPL

Are there multiple tabs open? If so this can cause unexpected issues on the browser. You can read in two tabs but not write in two tabs.

PLACING PLATFORM LIMITED FREQUENTLY ASKED QUESTIONS



3.16 I am trying to Cancel/NTU and Endorsement, but the option isn't available?

This option is only available until a certain point in the process. If your Endorsement is completed with all parties bound, then the *cancel / NTU and resubmit options will no longer be available in this particular scenario.

You would need to raise a further endorsement to supersede this one.

4 Broker – Endorsements

4.1 Can I add/remove underwriters when creating a new endorsement?

Yes, when creating an endorsement, you will have the option to add and remove underwriters towards the bottom of the page.

4 Markets Search for and then select an underwriter to be added

Add Underwriter *

An Agreement Practice must be entered before the Participant Function(s) can be selected Select the 'minus' symbol to remove a market

Underwriter	* Reference	* Participant Function	* Method	Hold	Action
Lloyd's Underwriter Syndicate No. 0033 HIS, London, England. (Claire Phelps)	dafvdafv <input type="text"/> +	<input type="text"/>	Platform <input type="text"/>	<input type="checkbox"/>	-
Lloyd's Underwriter Syndicate No. 1183 TAL, London, England (Vince Vega)	sgfngdhn <input type="text"/> +	<input type="text"/>	Platform <input type="text"/>	<input checked="" type="checkbox"/>	-

FIGURE 24 ENDORSEMENT - ADD AND REMOVE UNDERWRITERS

5 Underwriter – Endorsements

5.1 Endorsement Acceptance not in my Inbox?

If you save an endorsement response it will no longer appear in your inbox and your response will not have been sent to the broker. To send your response you will need to go to your homepage and then click on the Draft button in the endorsement section.



Figure 24 Endorsement Drafts

From here you will be able to search for the endorsement, open it and accept it by selecting **Manage** in the Action slider.

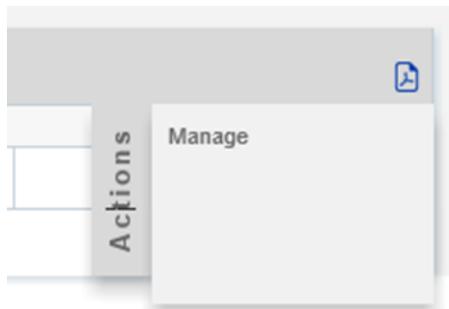


FIGURE 25 MANAGE DRAFT ENDORSEMENT

5.2 Does the Agreed Elsewhere Response on Endorsements respond to the broker?

When using the agreed elsewhere option this does not send a response to the broker. Instead this removes the endorsement from your inbox however you are still able to locate this but not able to respond to it. To get this reinstated you will need to contact the helpdesk.