

Contents

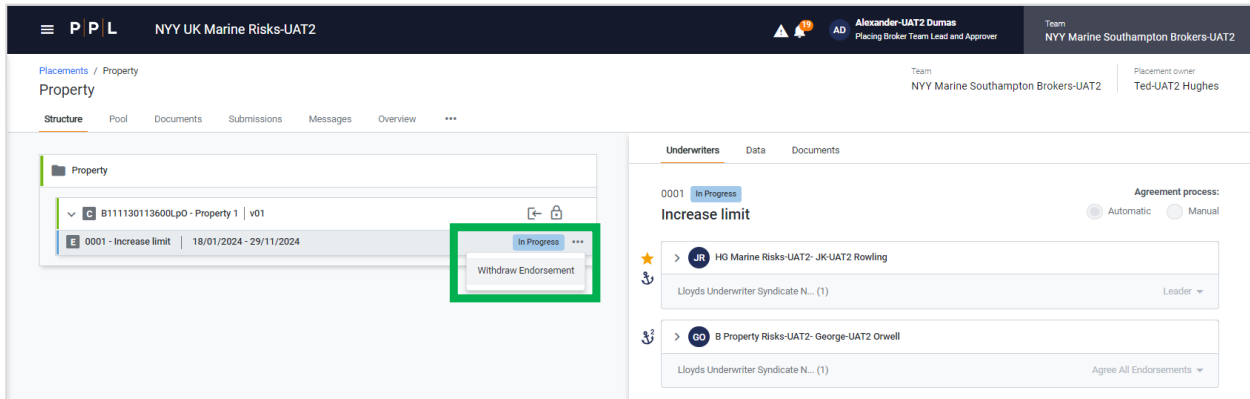
- Brokers – Resubmit Withdrawn Endorsements Using Same Reference..... 2
- Brokers – Endorsements – Removed Underwriters Status 3
- Brokers and Underwriters – Subjectivities on Generated MRC Document..... 3
- Underwriters – Hide Notification Requests from Underwriter Dashboard..... 4
- Underwriters – Save Filters on the Underwriter Dashboard 4
 - Reapply a Previously Saved Filter 5
 - Update an Existing Filter 5
 - Delete a Saved Filter 5
- Underwriters – Dashboard Enhancements..... 6
 - Date/Time Received Column 6
 - Dashboard Drop-Down Field Change..... 6
 - Dashboard Selections Now Remembered 6
- Underwriters – Subjectivity Add Button 7
- Underwriters – Data Tab on Placement Screen..... 7
- Underwriters – New Icons on Overview Tab 8

This document highlights some of the new or improved features available in Release 2.4 (February 2024).

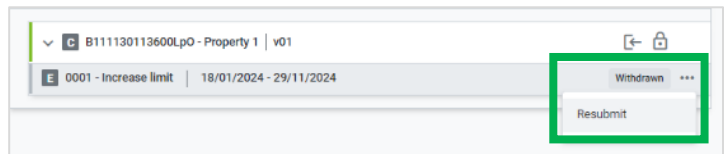
Brokers – Resubmit Withdrawn Endorsements Using Same Reference

When Brokers need to withdraw an endorsement, they can now correct the data or document and resubmit it using the same endorsement reference.

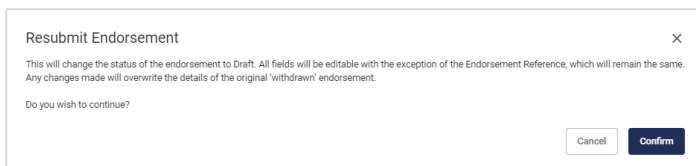
1. On the Structure tab, expand the contract to display the endorsement.
2. On the endorsement, select the ellipsis menu and choose **Withdraw Endorsement**.



3. Select **Confirm** on the message that appears. The status of the endorsement will now be **Withdrawn**.
4. When you're ready to make changes to the endorsement, select the endorsement ellipsis menu and choose **Resubmit**.



5. Read the message that appears and select **Confirm**. You can discard the resubmission before it has been submitted to Underwriters.



6. With the endorsement now back in Draft status, you can now:
 - Select the **Underwriters** tab and change the endorsement roles for the Underwriters.
 - Select the **Data** tab, select **Edit** and make the required changes. The **Endorsement reference** cannot be edited.
 - Select the **Documents** tab and replace the contract endorsement (MRCe) by deleting the existing one and uploading a new one or add/remove the endorsement supporting documents.
7. The Broker can now resubmit the endorsement to Underwriters, using the Endorsement Submission Builder in the normal manner. Any Underwriters whose role has been changed to 'Does Not Apply' will continue to see the withdrawn endorsement details.

Brokers – Endorsements – Removed Underwriters Status

When a Broker creates an endorsement on a contract or section, any Underwriter who has a **Removed from Cover** participation status will be pulled through to the draft endorsement, but their role will automatically be set to **Does Not Apply** and highlighted with an 'X' icon. This will make it easier to identify removed Underwriters.

Underwriters who have removed themselves from cover by mistake can be added back into the market panel via an MTMC endorsement.

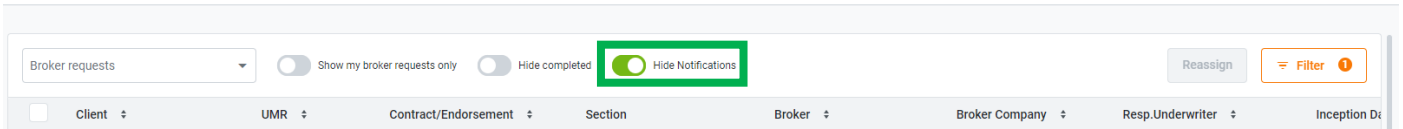
Brokers and Underwriters – Subjectivities on Generated MRC Document

When subjectivities are amended or deleted post-bind, they will not appear in the generated MRC document until they have been agreed by the Broker. This enables all parties to see the true picture at the time of generating the security documents.

Underwriters – Hide Notification Requests from Underwriter Dashboard

Underwriters can now hide notification items in their list of Broker requests by selecting the toggle above the column headings as shown below:

List of broker requests



All requests with a status of 'Notification' will be hidden. Selecting the toggle again will turn it off.

Note: All notifications will still be visible in the Notifications Dashboard (accessed by clicking on the bell icon from the broker Request Dashboard) and it is recommended to use this for managing notifications. Notifications on this dashboard can be marked as read or deleted entirely.

Underwriters – Save Filters on the Underwriter Dashboard

Underwriters can now save up to 20 filters on their list of Broker requests. To do this:

1. On the list of Broker requests, select the **Filter** button.



2. In the Filter screen that appears, select the required field(s) for this filter and enter information or select options to set your criteria e.g. UMR, Broker, Status etc.
3. Scroll to the bottom of the Filter screen and select Save/Update Favourite.
4. Leave the **Save As** field as 'New and enter a **Filter name** (up to 40 characters).
5. Select **Save**.

Note: When saving a favourite filter, the value in the dashboard drop-down (Broker Requests or Approval Requests) is also saved.

6. The list of Broker requests will be filtered, as indicated by the Filter button.



7. Repeat the process for any additional filters.

Note: If the Underwriter sits across multiple teams, the filter can be viewed by the Underwriter across all their teams. The filter(s) won't however be seen by other team members as they are user specific.

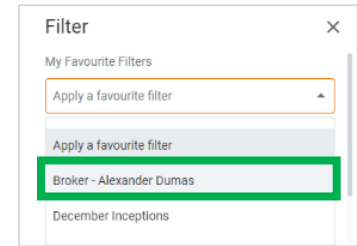
Saved filters will also remember the order of the columns on the dashboard and any toggles that have been applied, for example the Hide notifications toggle.

Reapply a Previously Saved Filter

1. Select the Filter button.
2. Select the **My Favourite Filters** drop-down field and select the required filter.

The selected filter will be applied.

Note: Filters are 'sticky' so any applied ones will remain applied the next time you log in.

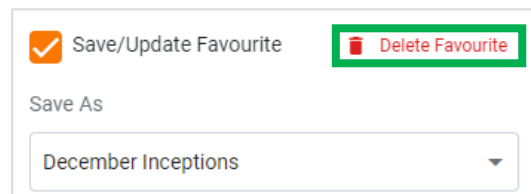


Update an Existing Filter

1. Apply the required filter.
2. Select the Filter button.
3. Make the required changes to the filter criteria then Scroll to the bottom of the Filter screen and select Save/Update Favourite.
4. In the **Save As** field, either select **New** and give the filter a name or select the name of an existing filter.
5. Select **Save**.

Delete a Saved Filter

1. Apply the required filter.
2. Select the Filter button.
3. Select Save/Update Favourite.
4. In the **Save As** field, select the filter to be deleted.
5. Select **Delete Favourite**.



Underwriters – Dashboard Enhancements

In addition to the improved Filter options, other enhancements have been made to the Underwriter Dashboard.

Date/Time Received Column

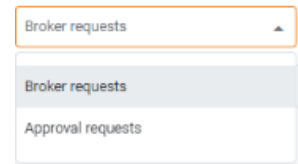
A new **Received Date** column has been added to the right of the Inception Date column, showing both the date and time the request was received:

Contract/Endorsement	Section	Broker	Broker Company	Resp. Underwriter	Inception Date	Received Date	Type	Sub-type	Status
01164726926 Property 3	Property 3	AD Alexander-UAT2 Dumas	NY Y UK Marine Risks-UAT2	BB Bill-UAT2 Bryson	01/12/2023	01/12/2023 - 17:01	Firm Order		Responded
29174841626 Increase limit	Property 2	AD Alexander-UAT2 Dumas	NY Y UK Marine Risks-UAT2	JR JK-UAT2 Rowling	29/11/2023	30/11/2023 - 13:52	Endorsement Firm Order	INCR	Responded
10165917Vxr Increase Limit	Property	AD Alexander-UAT2 Dumas	NY Y UK Marine Risks-UAT2	JR JK-UAT2 Rowling	10/11/2023	10/11/2023 - 17:29	Endorsement Firm Order	INCR	Not Responded
10165917Vxr Property	Property	AD Alexander-UAT2 Dumas	NY Y UK Marine Risks-UAT2	JR JK-UAT2 Rowling	10/11/2023	10/11/2023 - 17:19	Firm Order		Complete
30144143669 C1	C1	AD Alexander-UAT2 Dumas	NY Y UK Marine Risks-UAT2	JR JK-UAT2 Rowling	30/01/2023	30/01/2023 - 14:49	Firm Order		Not Responded

The column can be sorted by clicking the column heading, and the **Filter** also contains options to filter the list using **Received Date – From** and **Received Date – To** fields.

Dashboard Drop-Down Field Change

The main drop-down field on the Underwriter Dashboard now contains the simplified options to switch between **Broker requests** and **Approval requests**. The option to switch between the inception date and received date views for Broker Requests is no longer required as both these columns are now available on the same dashboard.



Dashboard Selections Now Remembered

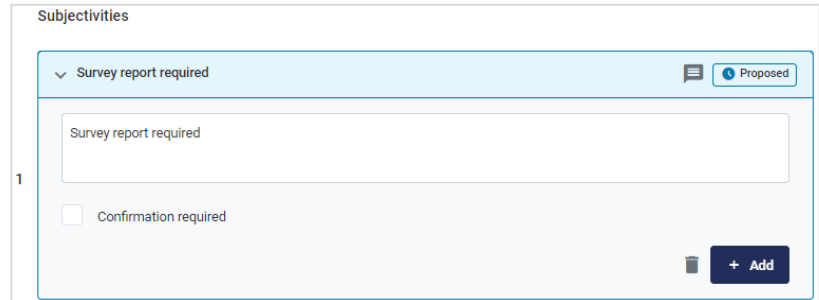
The options mentioned above for filters, sorting and selecting Broker or approval requests are all now 'sticky'. This means that your selections will remain if you navigate away from the screen, or log out and back into Next Gen.

Note: The options mentioned above are applied at user, rather than team level.

Underwriters – Subjectivity Add Button

When adding a subjectivity to a contract or section, Underwriters can now see an **+ Add** button to make adding subjectivities easier.

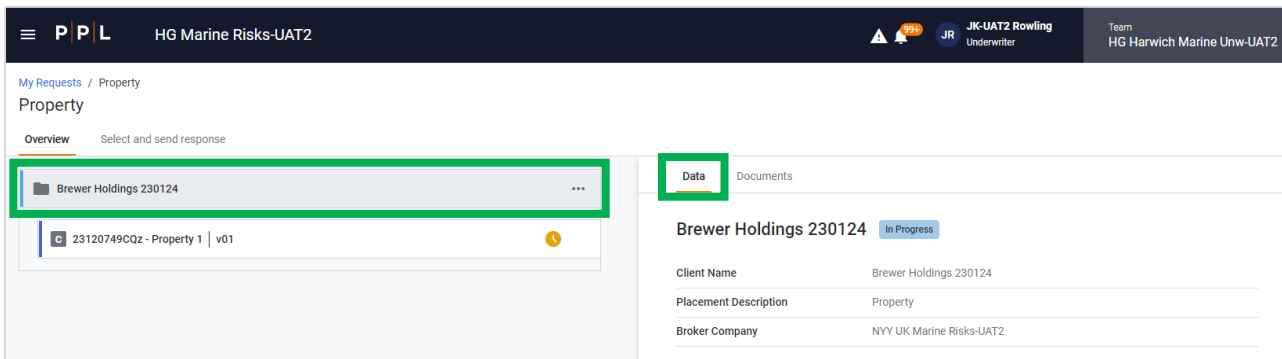
1. On the **Overview** tab, select the contract or section and on the right of the screen select the **Response** tab.
2. Enter your stamp and line details as normal.
3. Select **+ Add new subjectivity**.
4. As you start entering the subjectivity details the **+ Add** button will appear.
5. Select **+ Add**. The status of the subjectivity will change to **Proposed**.
6. Add further subjectivities as required or save your response.






Note: Subjectivities also have a number appearing to the left of them for easier identification.

Underwriters – Data Tab on Placement Screen

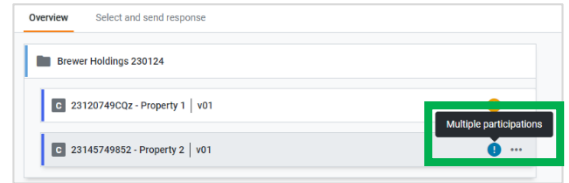
On the Overview tab of a placement, Underwriters can now select the Placement level on the left of the screen, then the new **Data** tab on the right of the screen. This enables you to see the **Client Name**, **Placement Description**, and **Broker Company** without referring to the MRC.



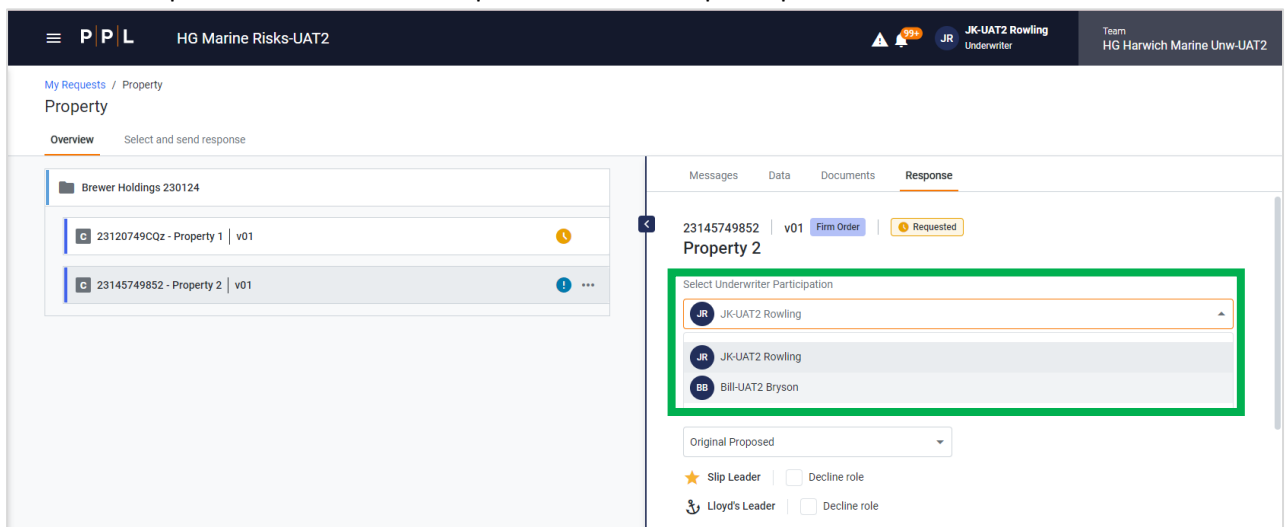
Underwriters – New Icons on Overview Tab

New icons will now be displayed on the Overview tab, on the relevant levels (nodes) of the Placement. This makes it easier for Underwriters to see when there's **Multiple Participation** , **Line Conditions**  or **Subjectivities**  present on a contract or section.

1. If the Underwriter's team has multiple participation on a contract, section or endorsement, the **Multiple Participation** icon will appear on the node on the left of the screen.



2. Select the **Response** tab. The **Select Underwriter Participation** field will appear if there's multiple participation.
3. Select the drop-down and select the required Underwriter participation.



4. If the Underwriter adds Line Conditions and/or Subjectivities to a contract or section, when they save their response the relevant icon(s) will appear on the node on the left of the screen.

