Acturis Systems Training

Platform

Technical
Training Academy

FIRST FOR JUSTICE

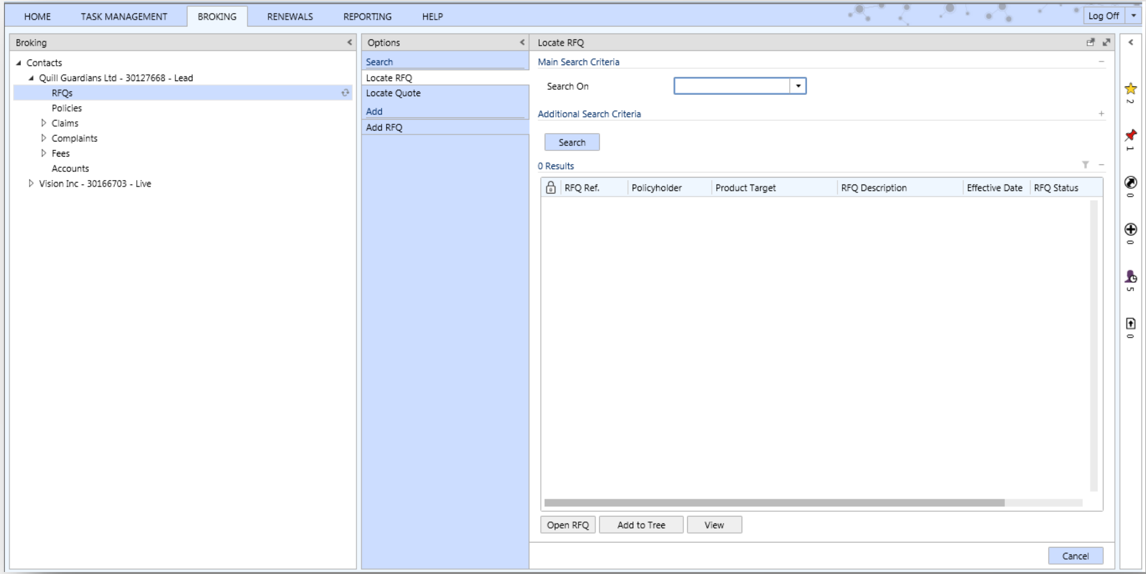
Objectives

By the end of this training session you will be able to:

- Provide a quote for a stand alone Legal Expenses Insurance policy and DAS Loss Assist policy.
- Provide a quote for an add on Legal Expenses Insurance policy
- Action a mid term adjustment for a Legal Expenses Insurance policy
- Cancel a Legal Expenses Insurance policy
- Renew a Legal Expenses Insurance policy

Creating A Stand Alone Policy

To add an RFQ firstly find the customer profile or create a new profile and then select **Add RFQ** from the **Options** column.

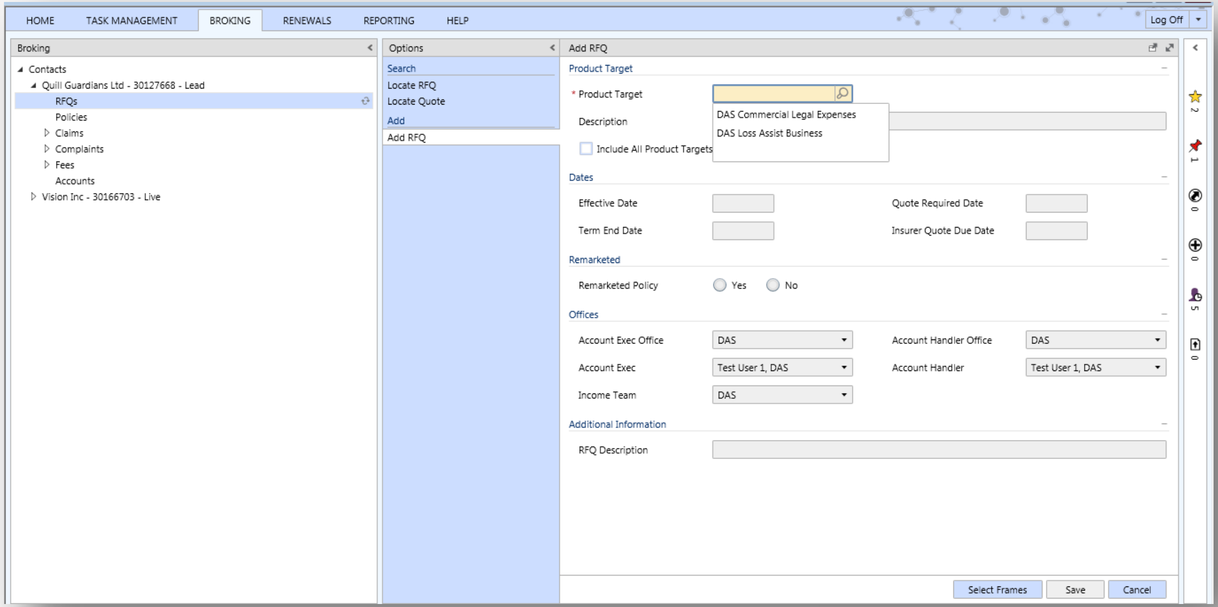


Creating A Stand Alone Policy

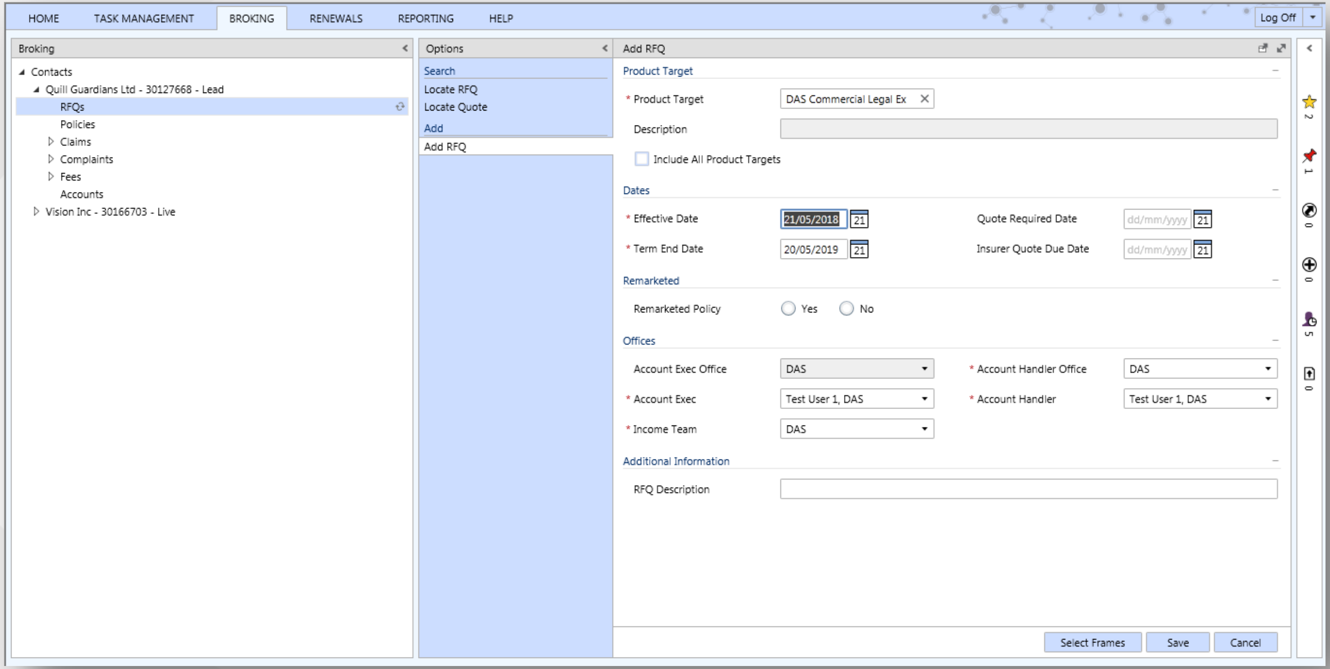
Select the appropriate **Product Type** from the drop down.

DAS Commercial Legal Expenses (Commercial Legal Expenses Insurance Product) or **DAS Loss Assist Business** can be selected for a stand alone policy.

Alternatively by selecting another product you will have the opportunity to add **DAS Commercial Legal Expenses** to your policy.



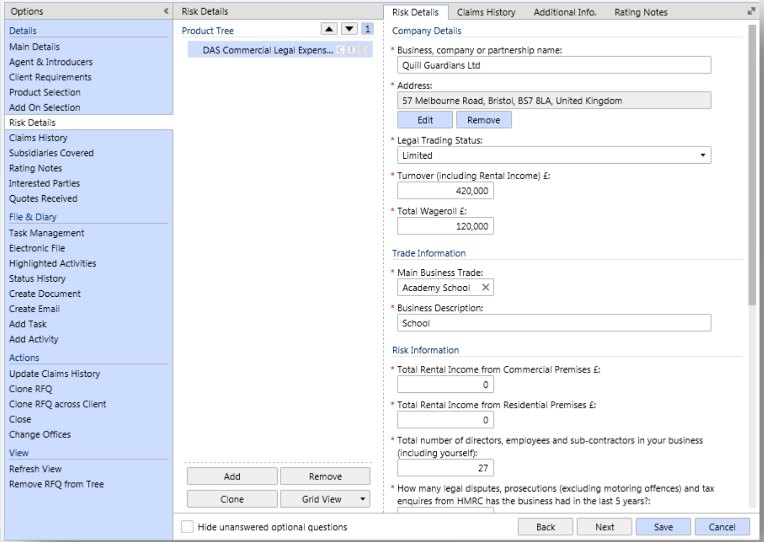
Creating A Stand Alone Policy



Populate the required fields marked with a **red asterisk**.

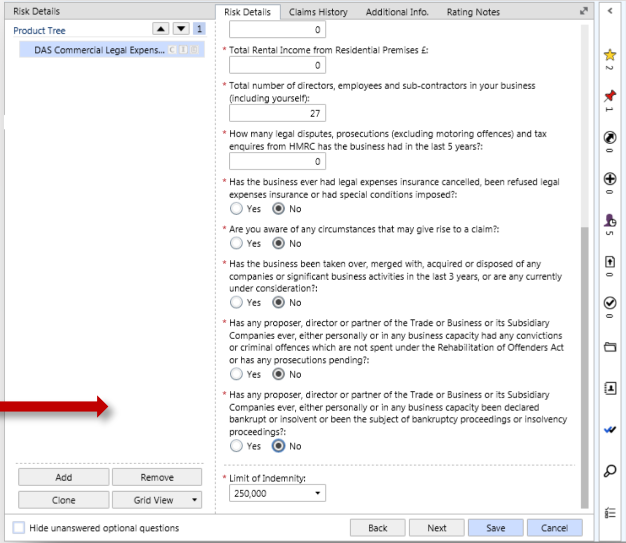
Once the information has been populated and saved, click on **Risk Details** from the the **Options** column.

Creating A Stand Alone Policy



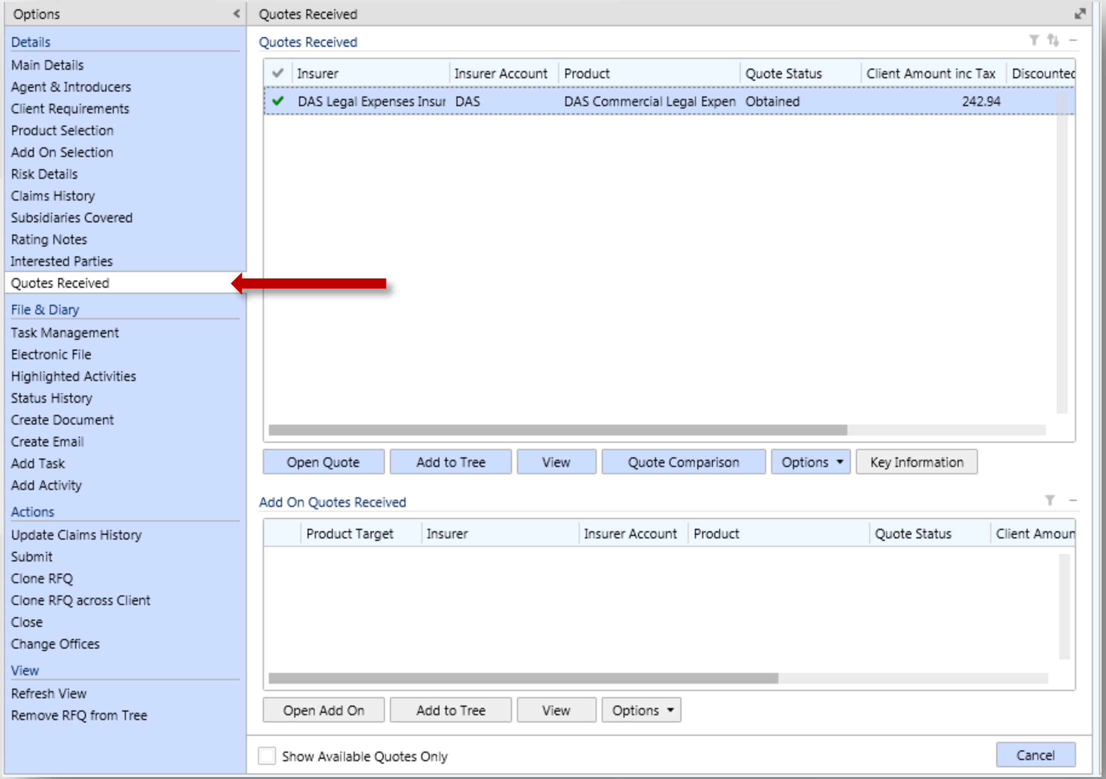
Populate the required fields.

Ensure you scroll down to complete the required fields.



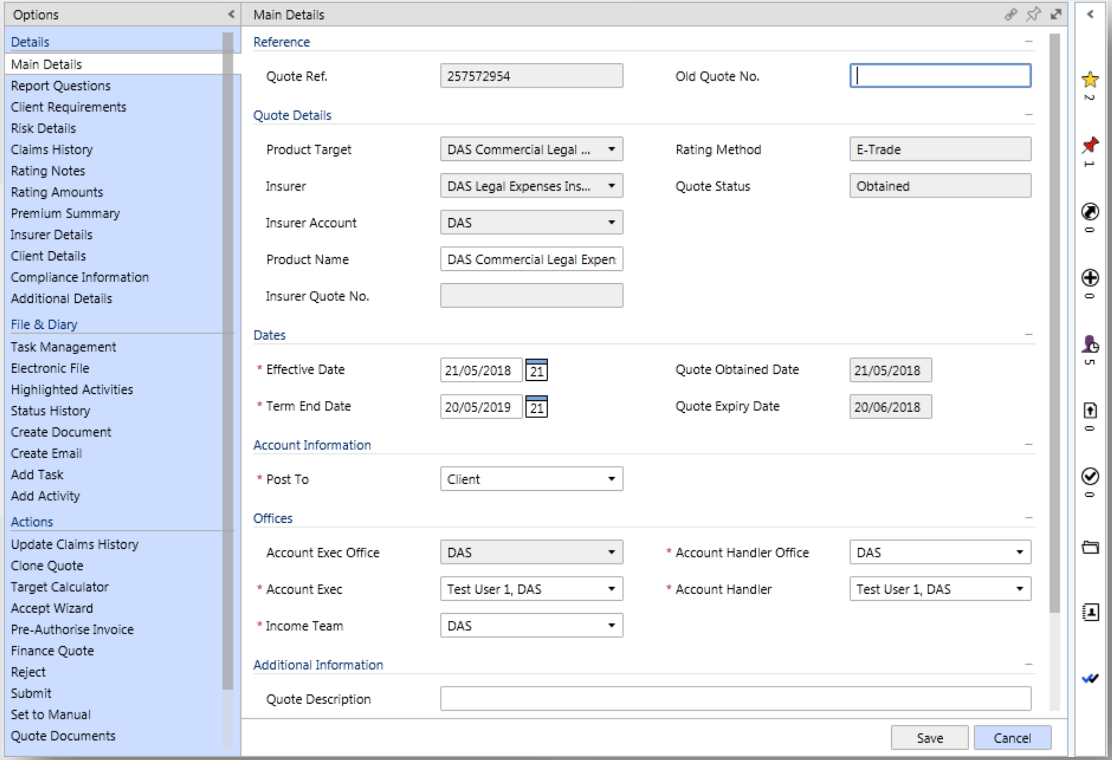
Once completed press **Save** and then **Submit**.

Creating A Stand Alone Policy



Next, open the quote which will take you to the main details screen by clicking on **Quotes Received** under the **Options** column.

Creating A Stand Alone Policy



Once you have retrieved your quote, double click the quote to open it. You can also view the quote documents by clicking 'quote documents' in the options tab, and then visiting the electronic file.

From here you will now be able to accept the policy by selecting on **Accept Wizard** under **Actions** in the **Options** column.

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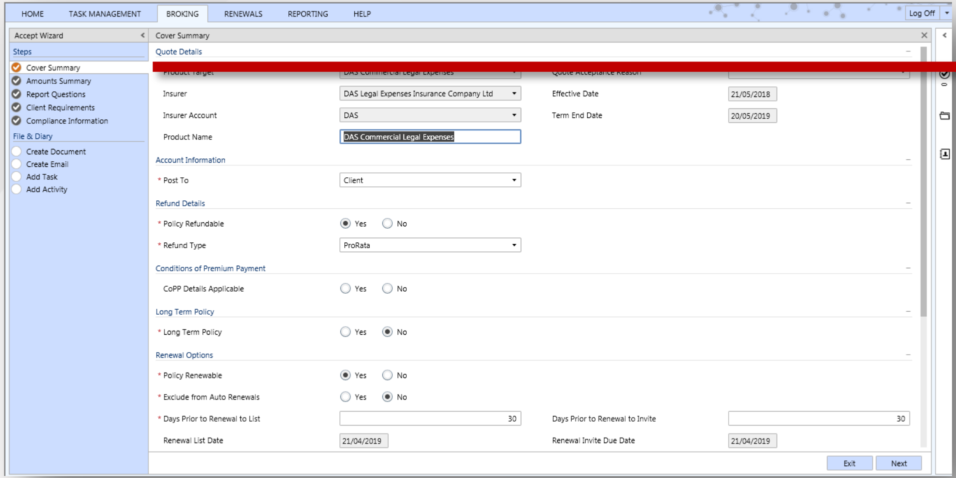
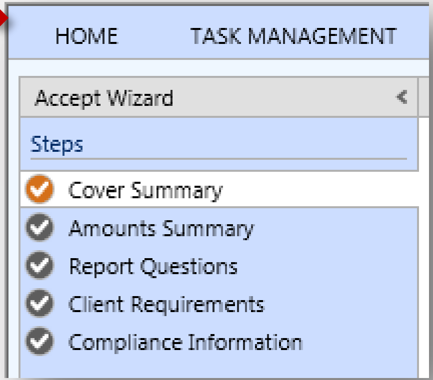
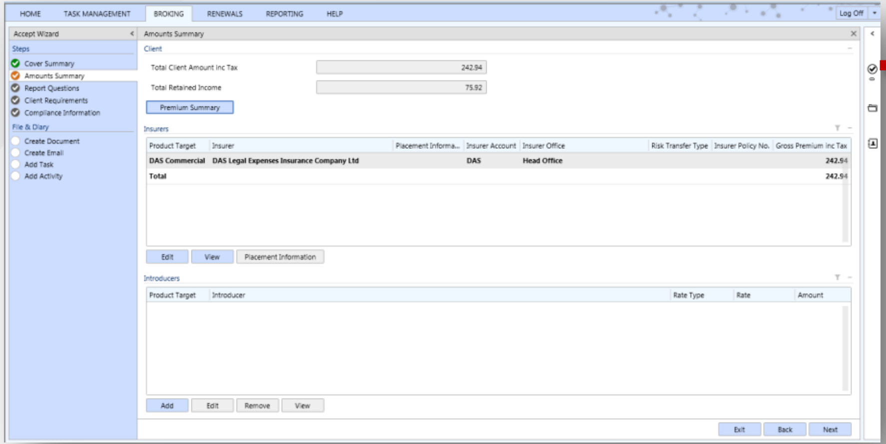
Creating A Stand Alone Policy

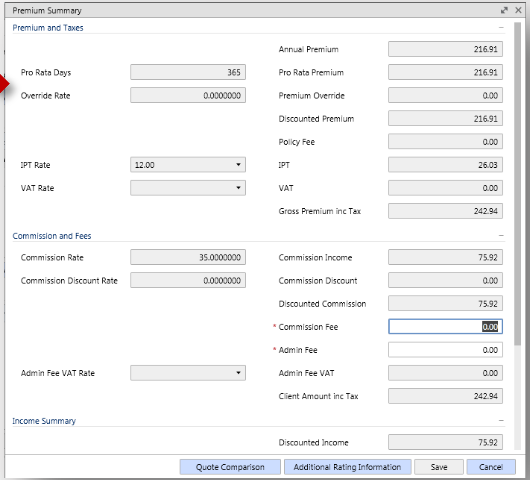




From here you will run through the **Accept Wizard**. This will replace the Options column whilst running through the completion of the policy. As each section is complete a tick under the Accept Wizard steps will highlight in **green**. The section currently being worked on will highlight in **orange**.

Creating A Stand Alone Policy

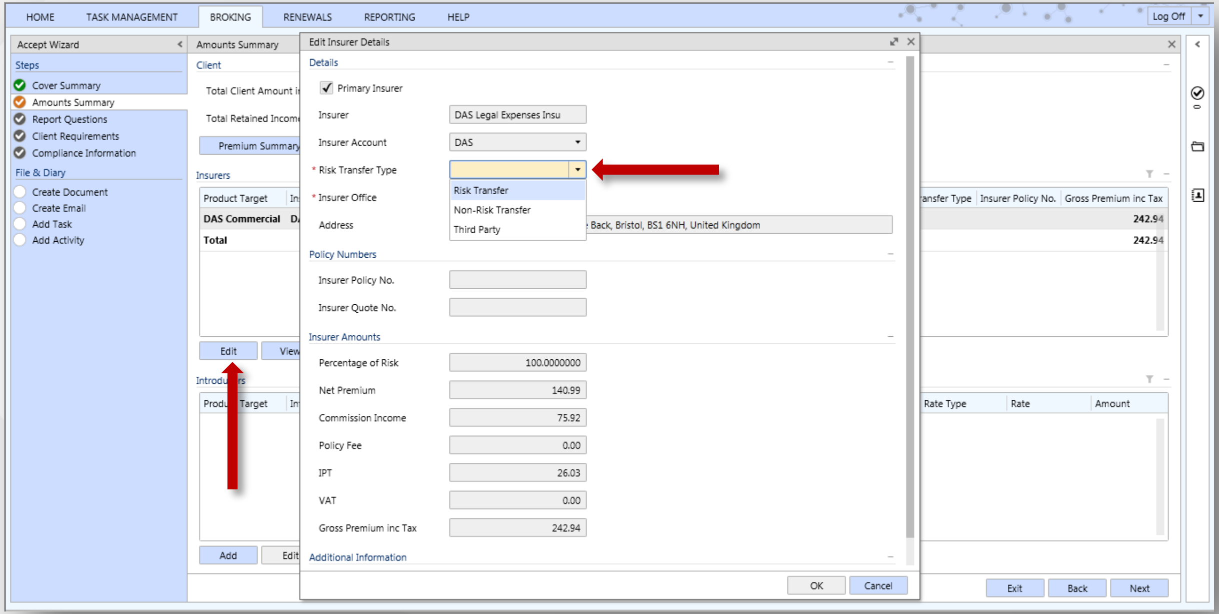




Under the following section **Amounts Summary** (second step in the Accept Wizard) you may wish to click on 'Premium Summary' to change the commission or fee, remembering to save any amendments. Alternatively you can cancel the screen without making any amends.

Creating A Stand Alone Policy

You will also need to click on **Edit** under the **Product Target** which will allow an additional pop up to open.



Select **Risk Transfer** from the Risk Transfer Type drop down.

Once selected, press ok and the pop up will close automatically. From here, select **Next**.

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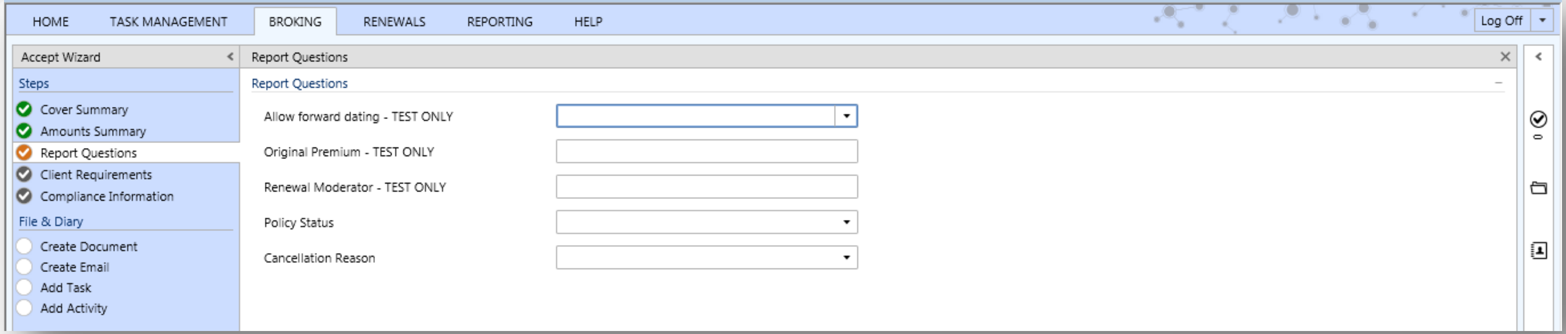
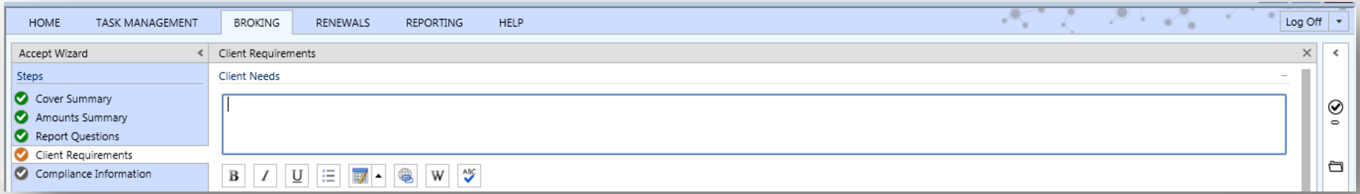
Creating A Stand Alone Policy

Complete the following screen as per your standard process.



Same again on the Client Requirements screen, click Next.



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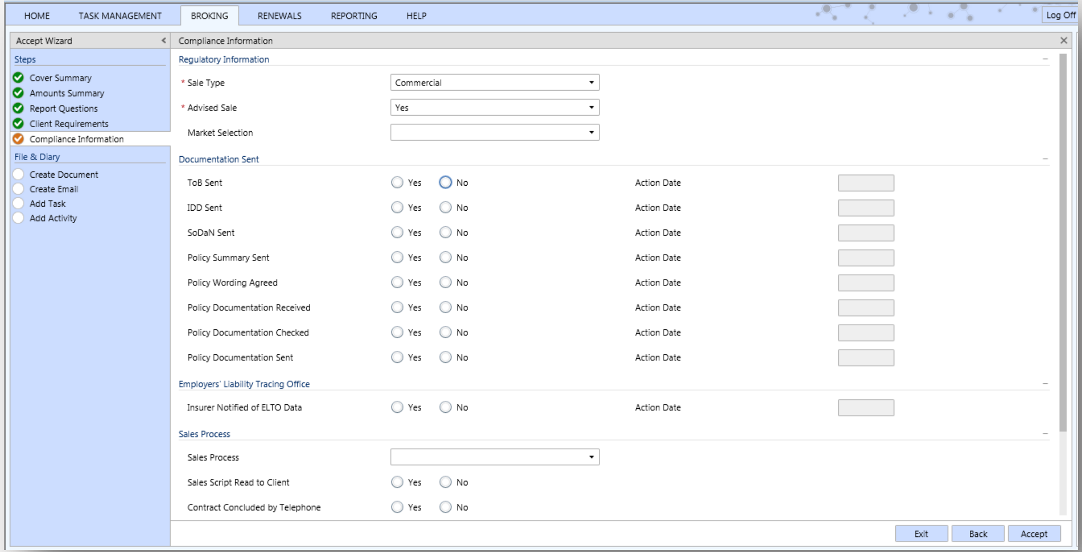
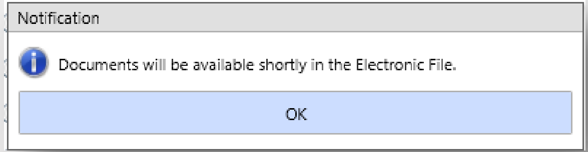
Creating A Stand Alone Policy

On the final screen of the **Acceptance Wizard**, there are two drop down boxes that need to be populated accordingly; if the policy is an advised sale and the sale type.

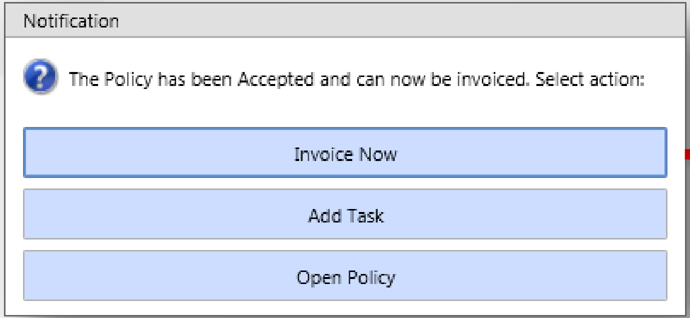
Once populated, include any additional details as per your standard process, click on **Accept**.

A pop up will confirm the documents will be available shortly in the **Electronic File**.

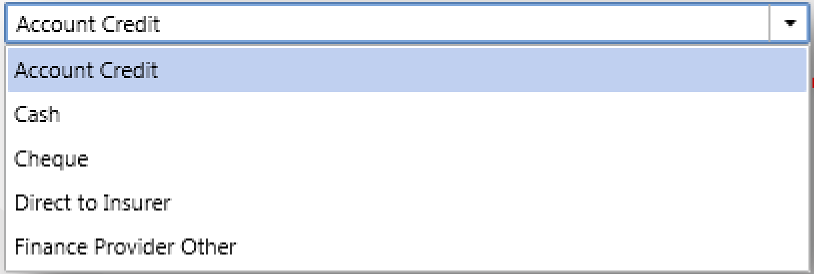




Creating A Stand Alone Policy



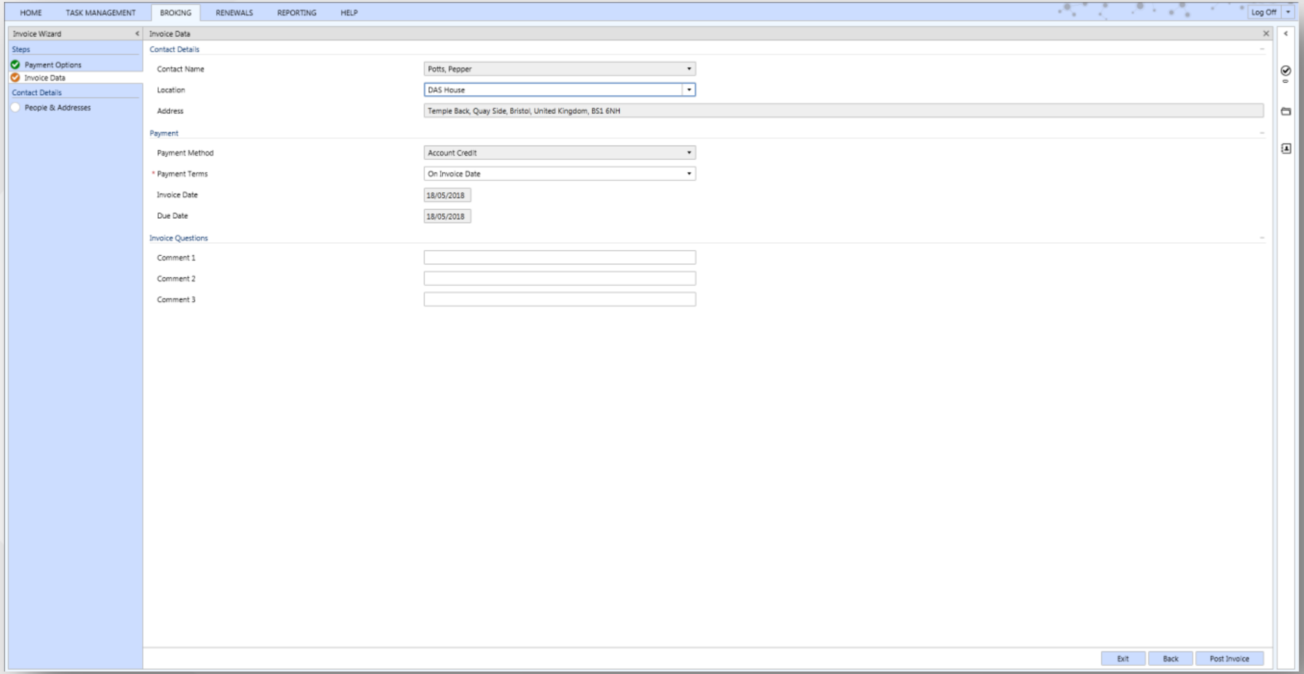
The next pop up will ask you to confirm if the client is being invoiced now, if you wish to add it as a task or if you wish to open the policy again.



Acturis will pull through the payment method used on the previous policy version. If this is not correct select the correct option from the drop down list as per your business operating model.

Then click **Next**.

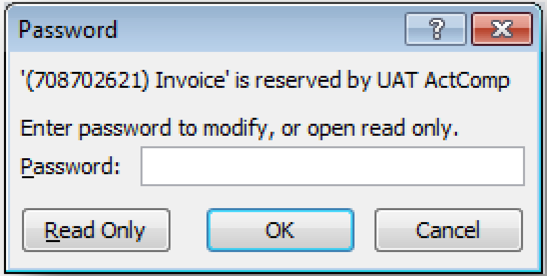
Creating A Stand Alone Policy



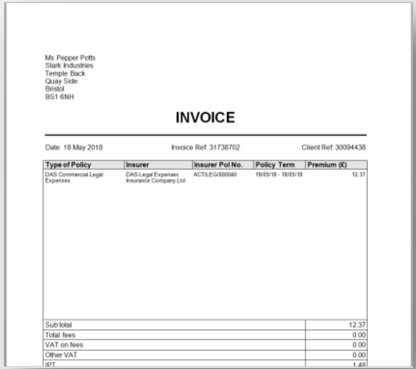
Check the details pulled through are correct and add any additional comments in the comment boxes, then click next to continue.

Then click **Post Invoice** to open the invoice.

Creating A Stand Alone Policy



The invoice will open in Microsoft Word as a password protected document, you can only open it as read only.



Ms Pepper Potts
Stark Industries
Temple Back
Quay Side
Bristol
BS1 6NH

INVOICE

Date: 18 May 2018 Invoice Ref: 31738702 Client Ref: 30094438

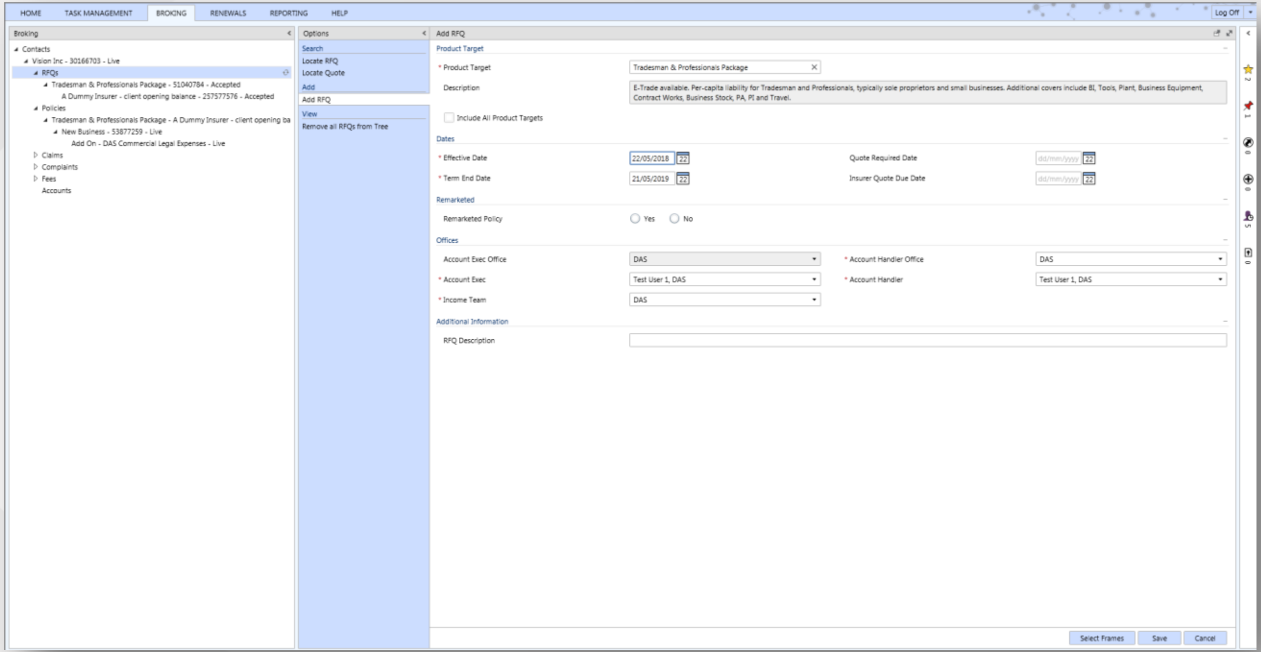
Type of Policy	Insurer	Insurer Pol No.	Policy Term	Premium (£)
DAS Commercial Legal Expenses	DAS Legal Expenses Insurance Company Ltd	ACT/LEG/000040	19/05/18 - 18/05/19	12.37

Sub total	12.37
Total fees	0.00
VAT on fees	0.00
Other VAT	0.00
IPT	1.48

The invoice will automatically save into the **Contact Electronic File**. You can now close the document.

The policy is now live, as shown in the **Broking** column on Acturis.

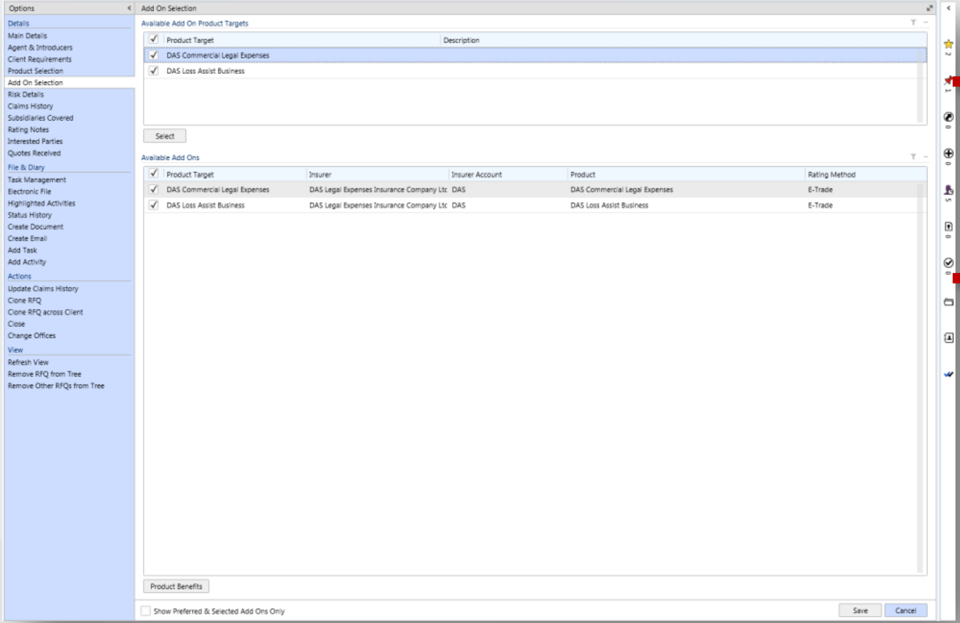
Creating An Add On Policy

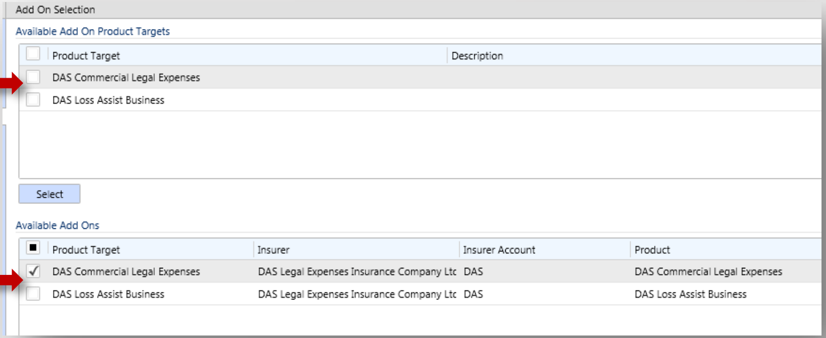


To create an add on, complete an RFQ for your required commercial insurance policy. If DAS Commercial Legal Protection is available as an add on it will show in the 'Add on Selection' box.

Complete the required information then click on **Save**.

Creating An Add On Policy





Ensure **DAS Commercial Legal Expenses** is selected.

From here you will now need to select **Risk Details**. Click on the **RFQ** and then Risk Details in the **Options** column.

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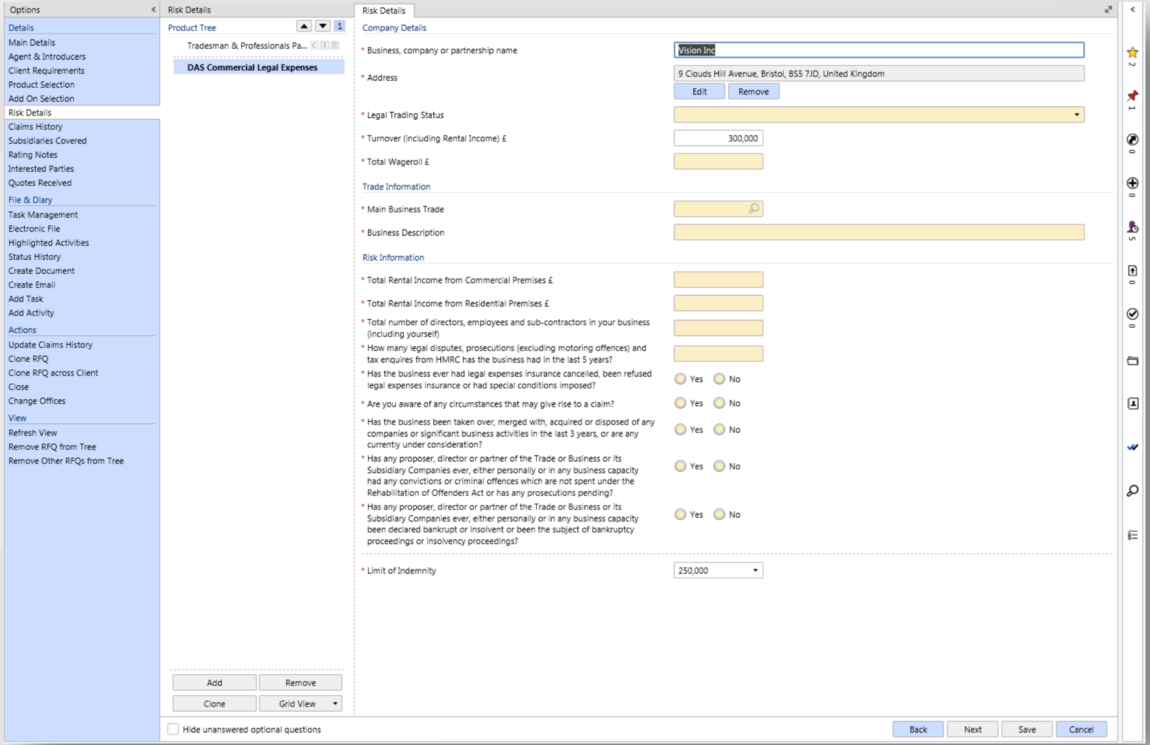
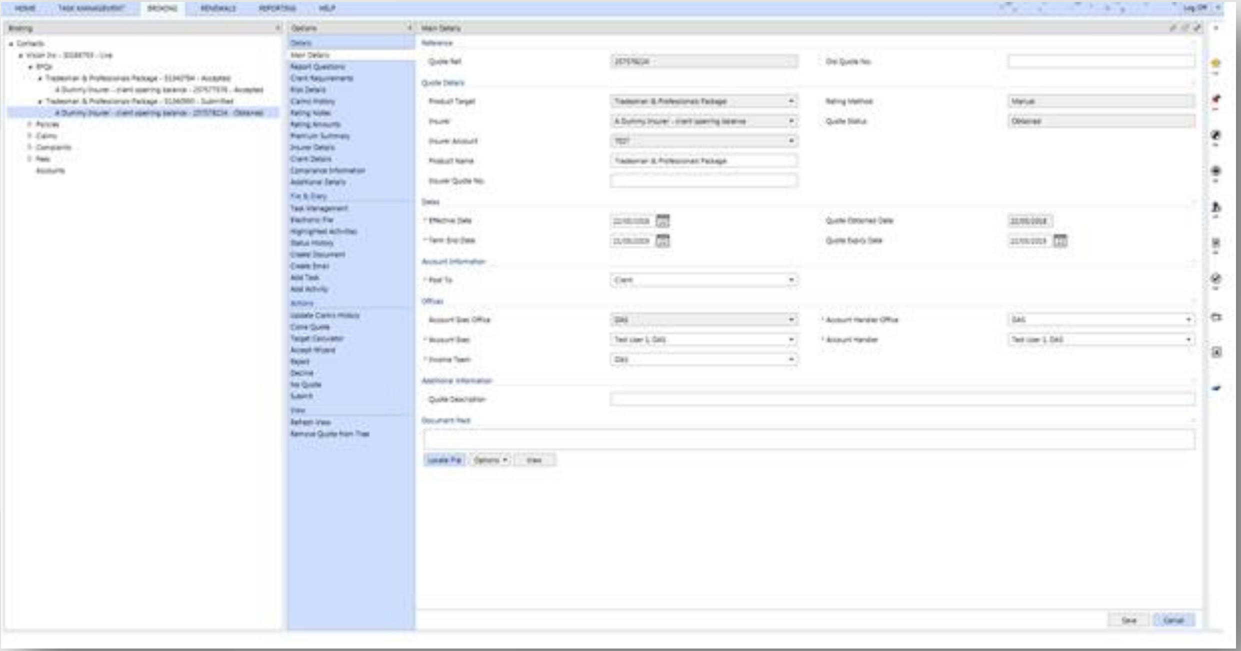
Creating An Add On Policy



Once you have completed the risk information for the underlying insurance product click next to begin the risk entry for the DAS cover and complete the required fields with a red asterisks.

Once the required boxes have been populated, click **Save** and then click **Submit**.

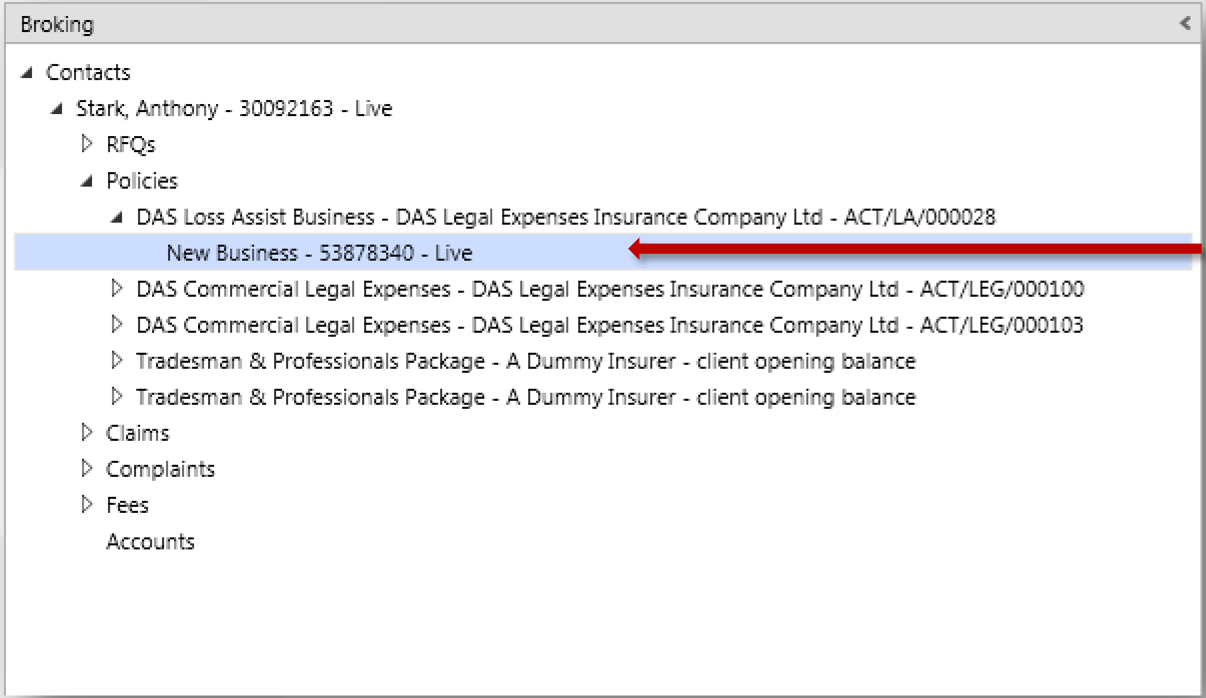
Creating An Add On Policy



Make sure that the legal expenses add on is ticked on the cover summary step of the **Accept Wizard**.

This will complete the policy.

Mid Term Adjustment



To make an MTA , select the Live policy from the Broking column, under the contact you are amending the policy for.

If the policy has DAS cover as an add on then remember to follow these steps to update the live DAS policy in addition to the underlying insurance product.

Mid Term Adjustment

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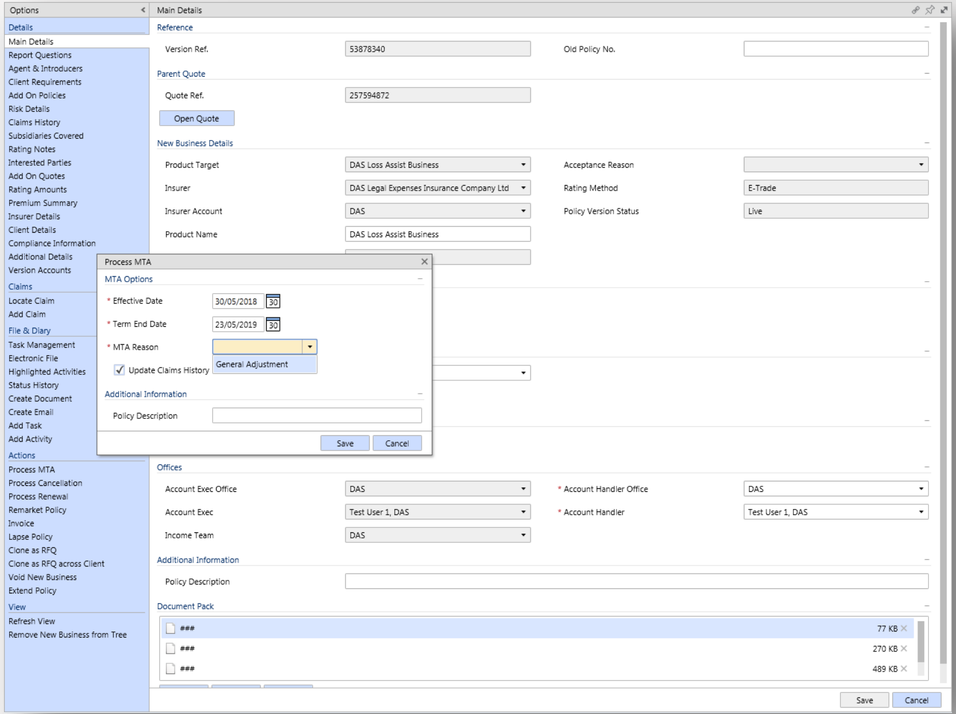
Once you have selected the correct live policy, select **Process MTA** from the **Options** column.

A pop up box will appear.



Enter the effective date for the MTA and select the reason from the **MTA Reason** drop down box.

Once actioned, click on **Save**.

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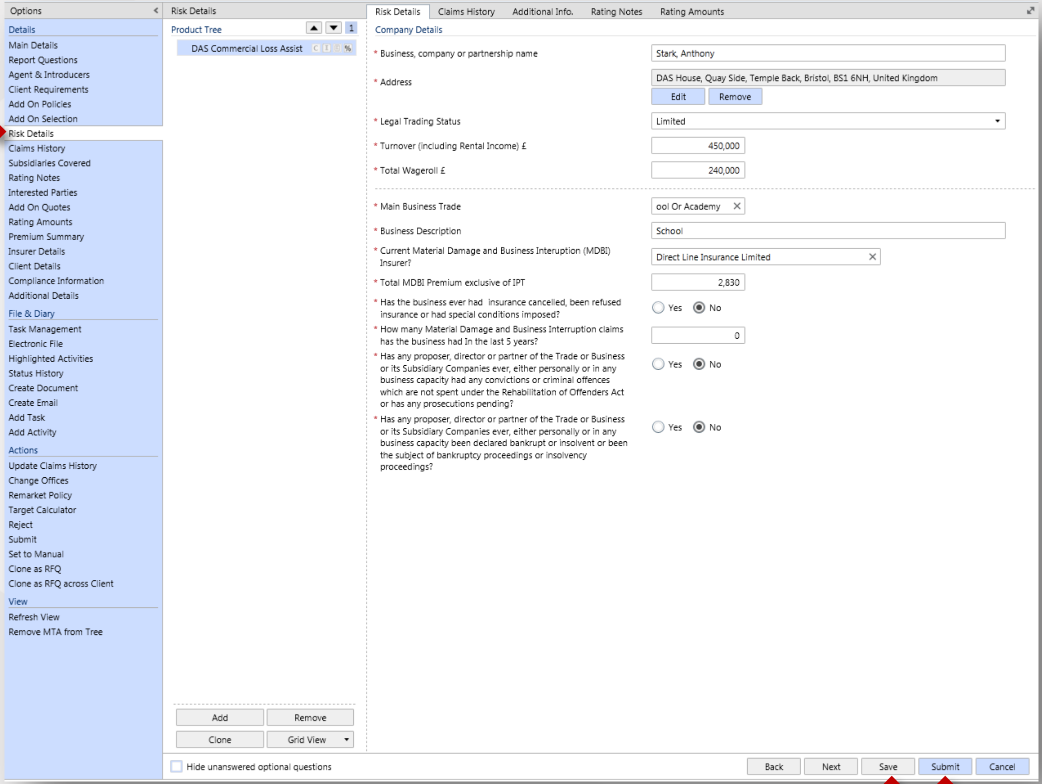
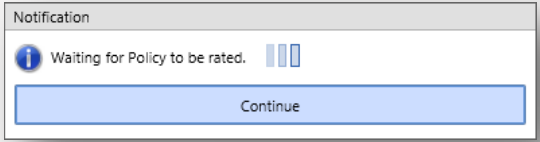
Mid Term Adjustment



Now select **Risk Details** from the **Options** column. You will now be able to make the required amends to the live policy.

You can **Save** at any point to come back to the MTA, once saved there is an option to **Submit** the request, which will finalise the MTA request. Once submitted, the policy will be re-rated.



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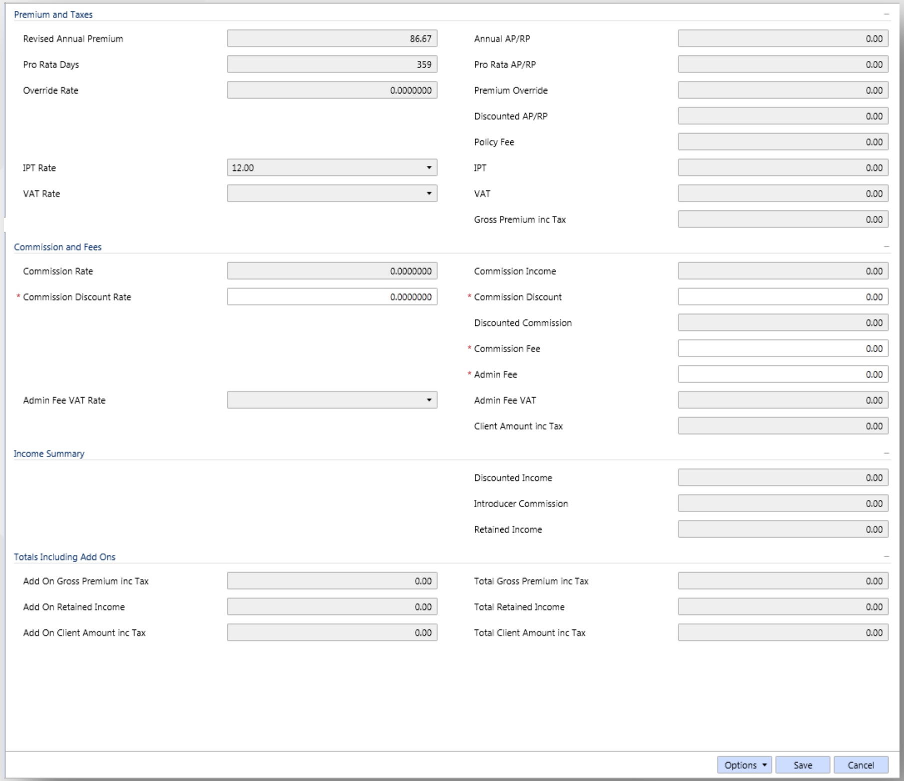
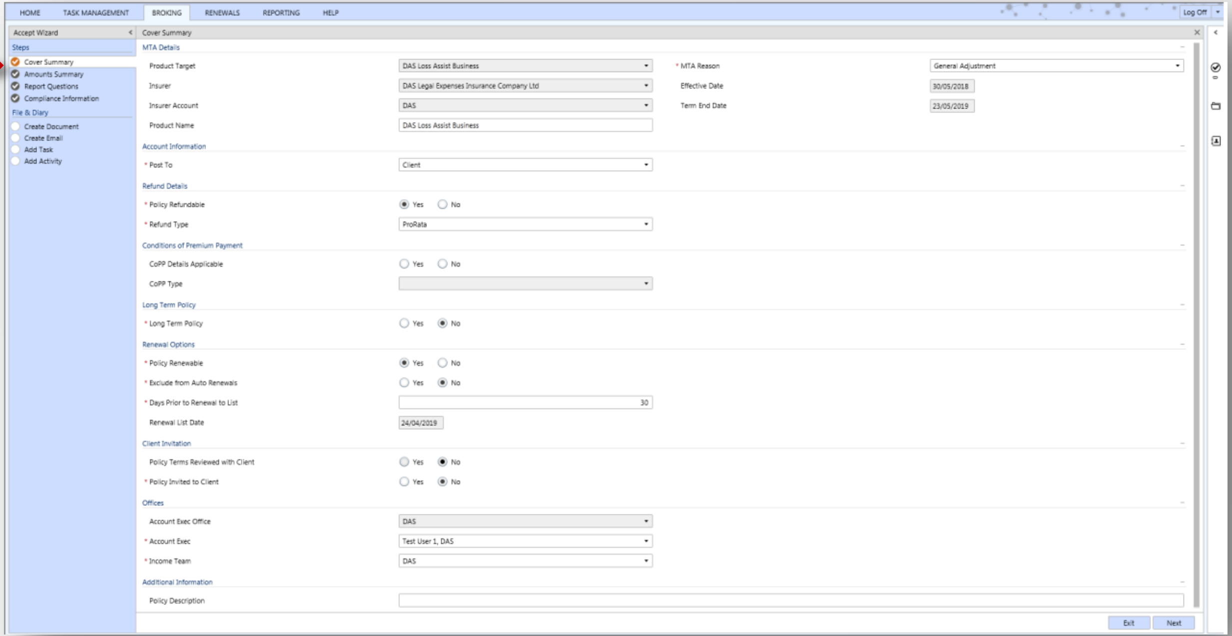
Mid Term Adjustment



You can now confirm the new premium and make any amends to the commission or fee, should you need to.

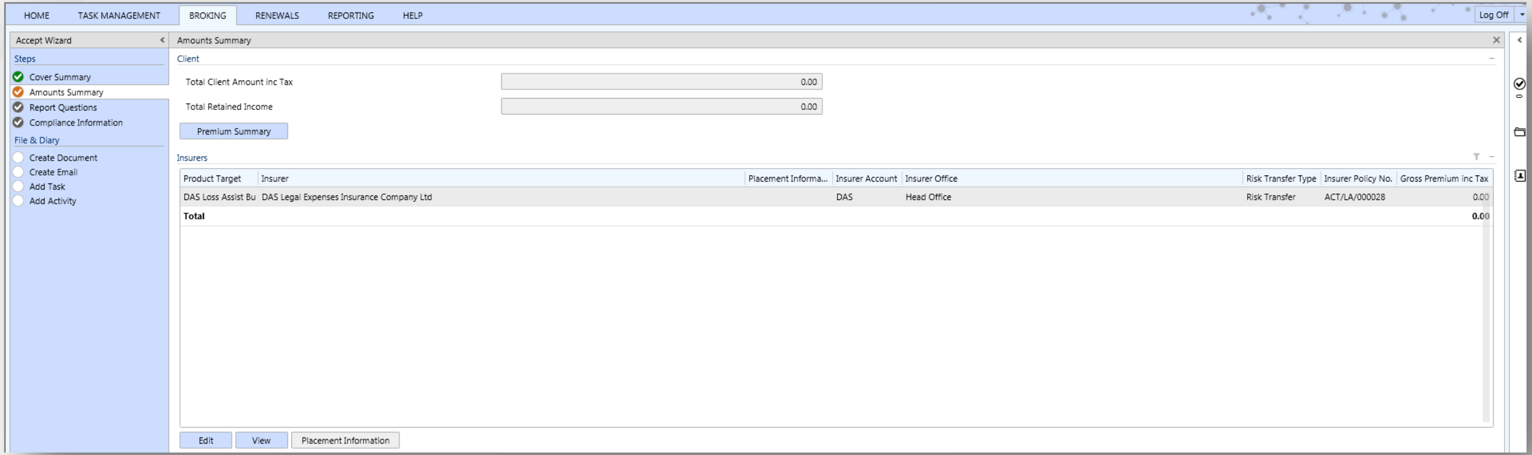
Once amended, click on **Save**. Now you can accept the MTA.

Mid Term Adjustment



Follow the Accept Wizard, as previously shown when accepting a policy and complete as per your standard process.

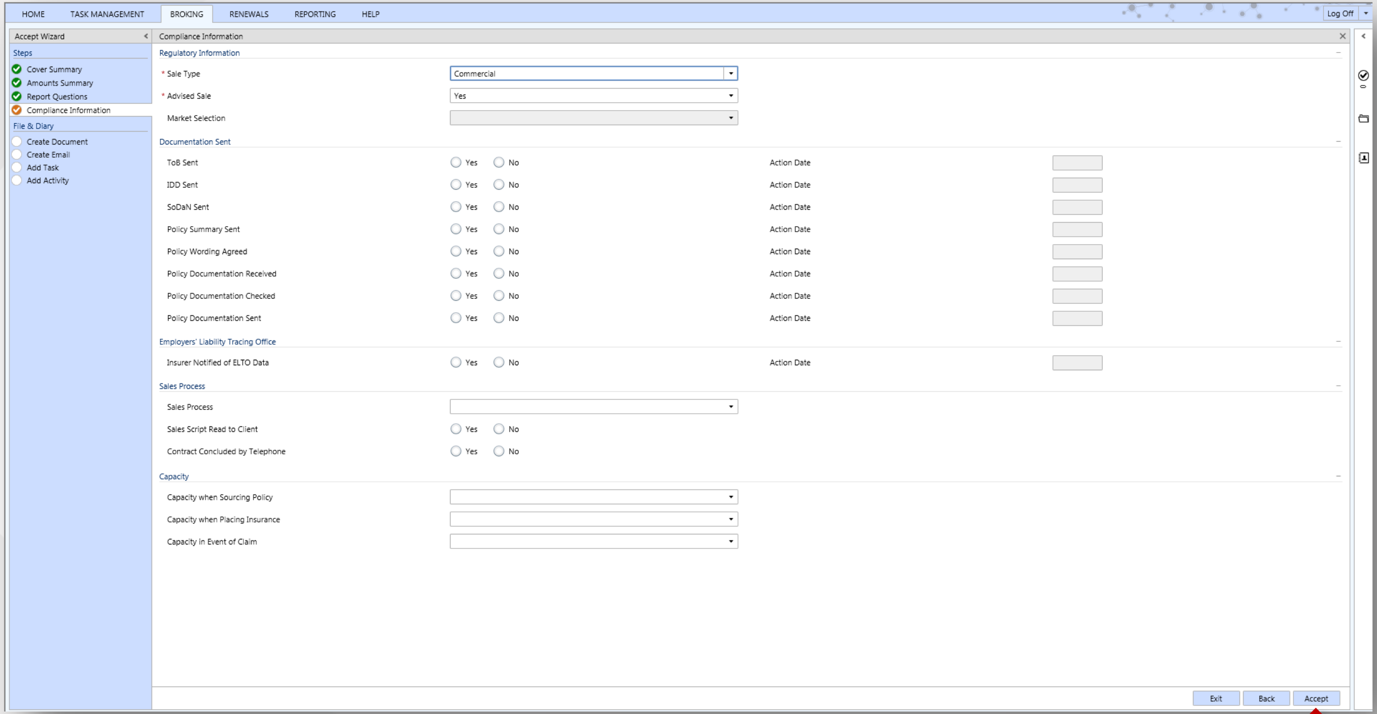
Mid Term Adjustment



On the **Amounts Summary** screen you will have an opportunity to review the premium by selecting **Premium Summary**. If happy with the premium, click on **Next**.

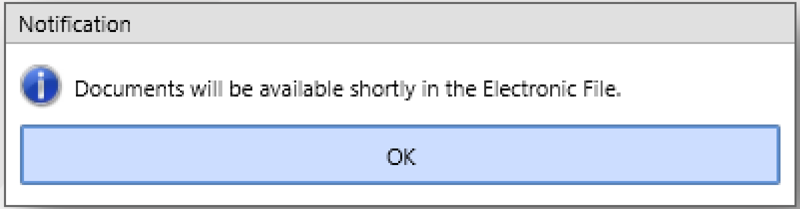
Complete the **Report Questions** screen as per your standard procedure and click on **Next**.

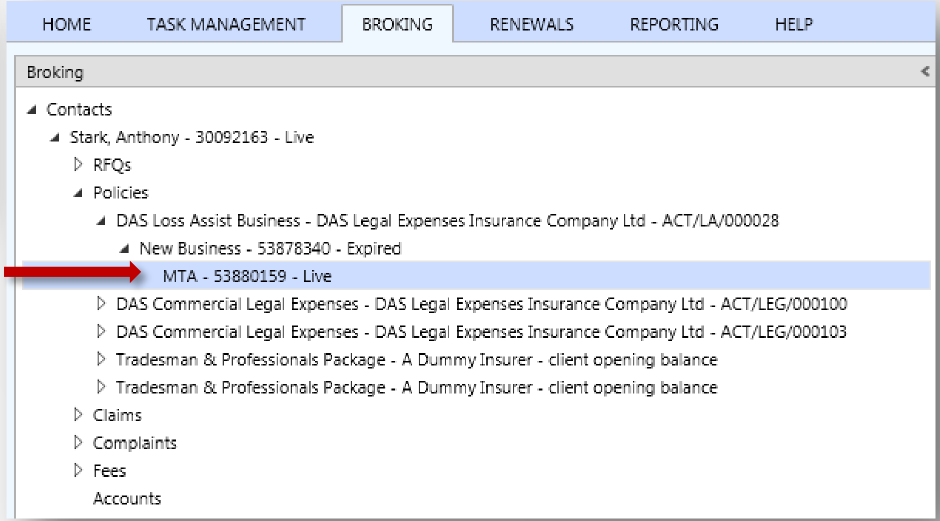
Mid Term Adjustment



Again, as per your usual process, complete the **Compliance Information** screen and click on **Accept**.

Mid Term Adjustment



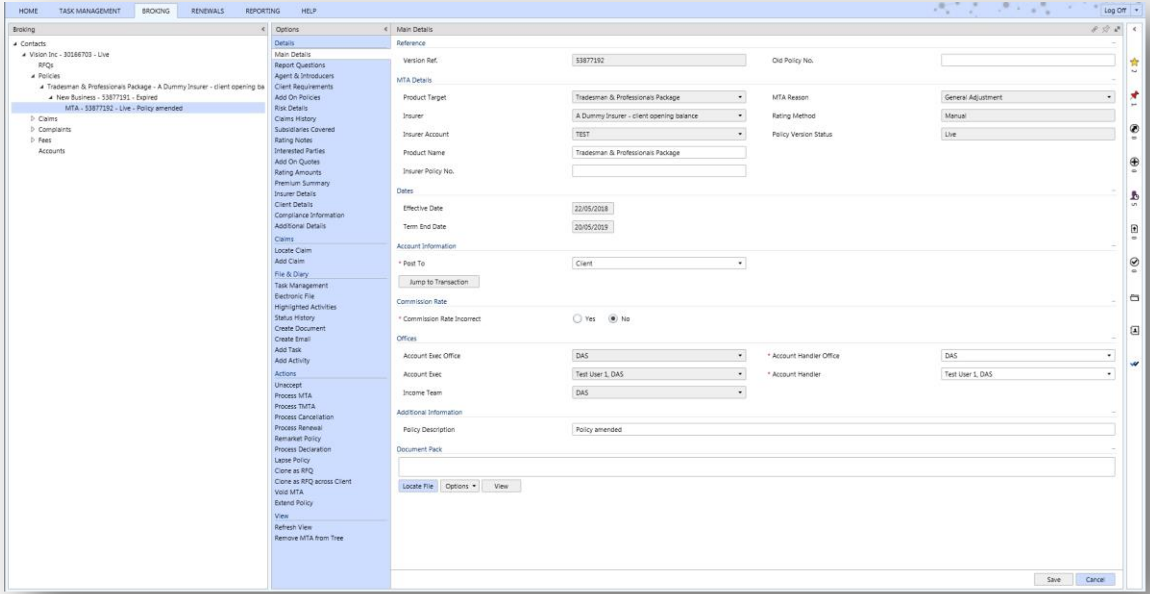


A pop up box will confirm the documents will be available in the **Electronic File**, under **File & Diary** in the **Options** column.

Select **Accept** and the MTA will be showing as **Live** in the **Broking** column.

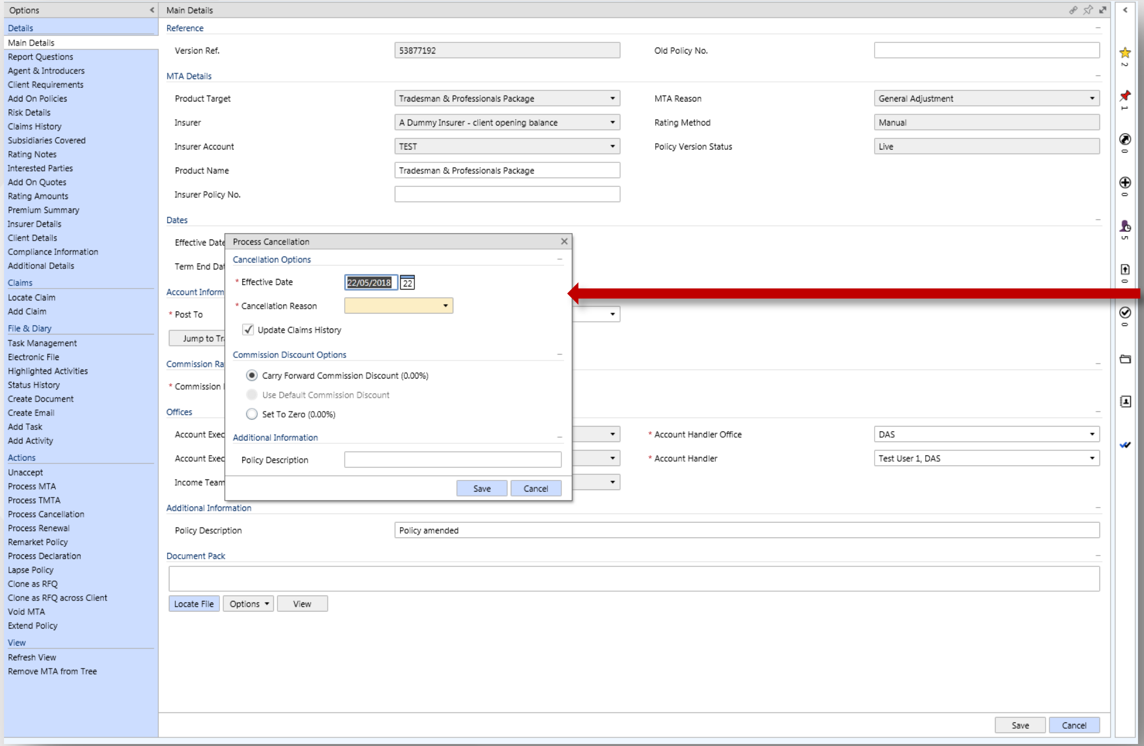
The **MTA** is now complete.

Cancellations



To cancel a policy, firstly select the policy you wish to cancel in the **Broking** column.

Cancellations

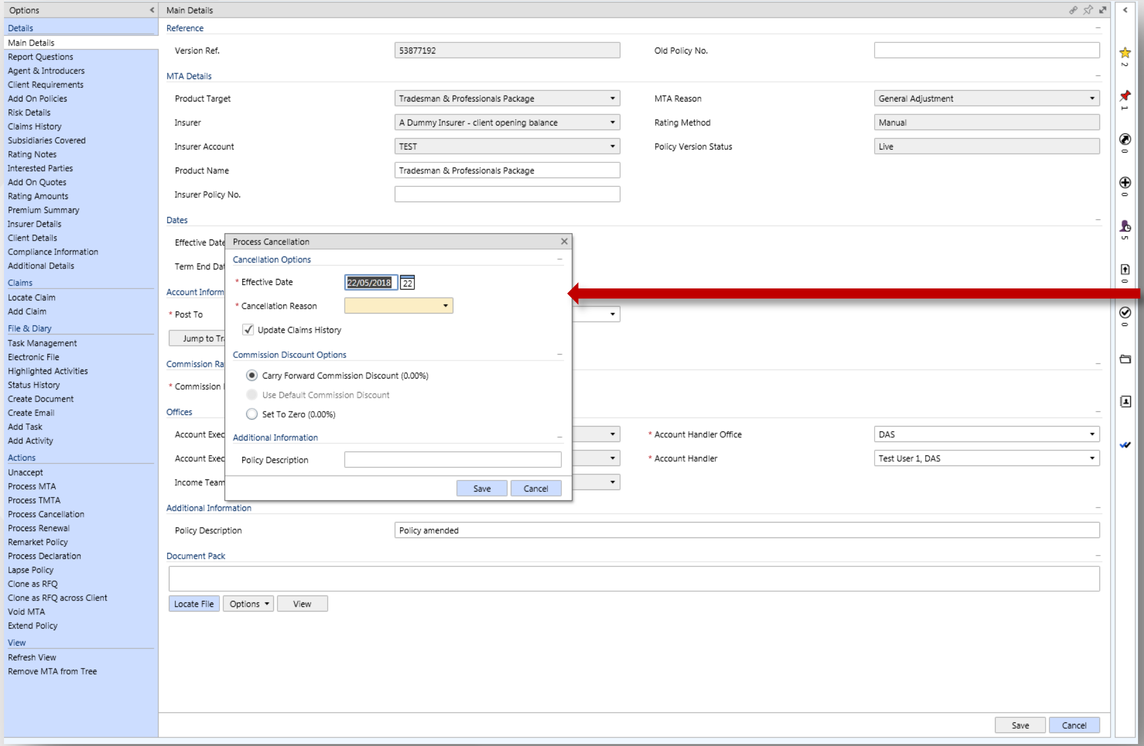


Once the correct policy has been selected, click on **Process Cancellation** in the **Options** column, under **Actions**.

Complete the pop up box ensuring the correct dates have been entered.

From the **Cancellation Reason** drop down, select the reason cover is no longer required.

Cancellations

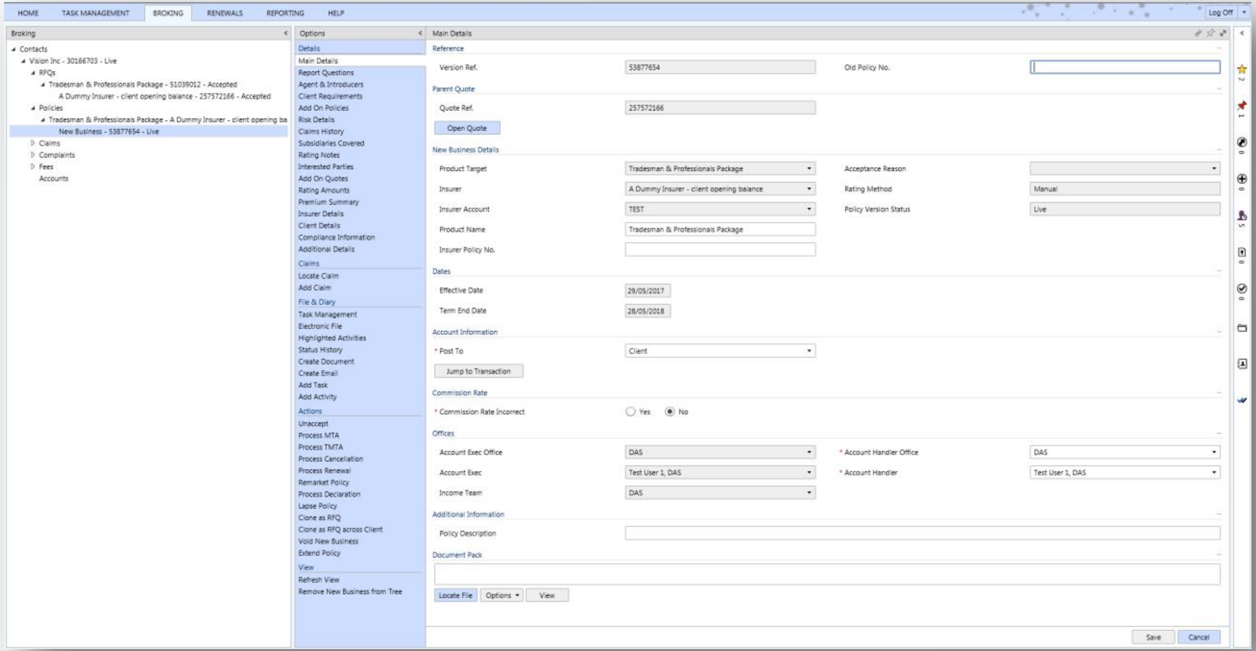


Now you will need to **Submit** (under **Actions** in the **Options** column) and this will give a cancellation quote with the return premium on the premium tab and the cancellation will show as **Obtained**. They then need to **Accept Wizard** the cancellation quote.

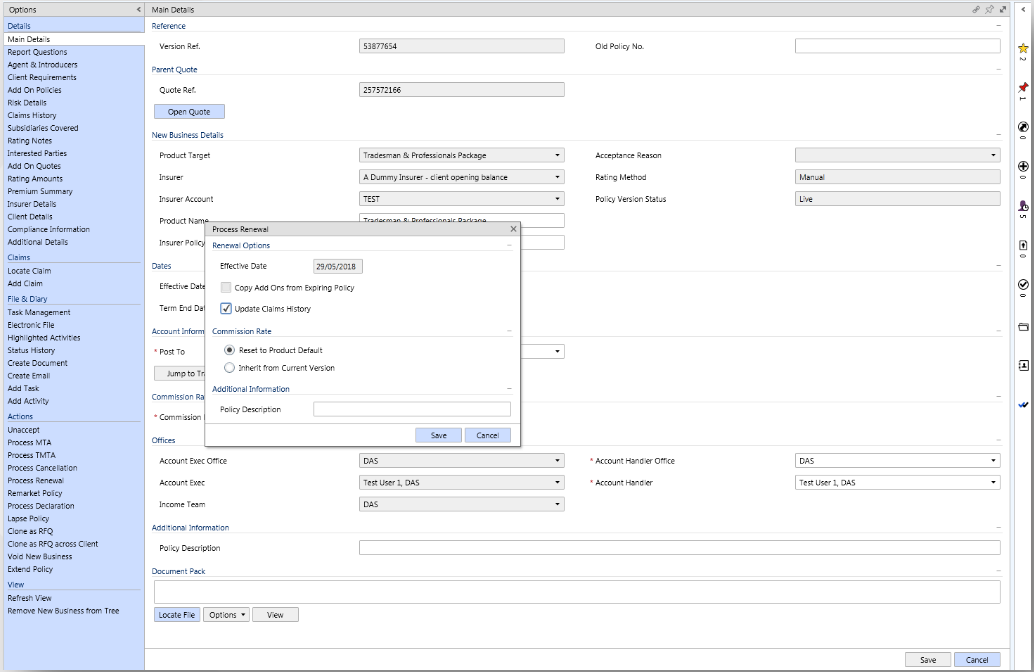
The cancellation will then be **Live** in the broking tab.

Renewals

To renew a policy, first select the policy that requires renewing from the **Broking** column and then click on **Process Renewal** in the **Options** column.



Renewals

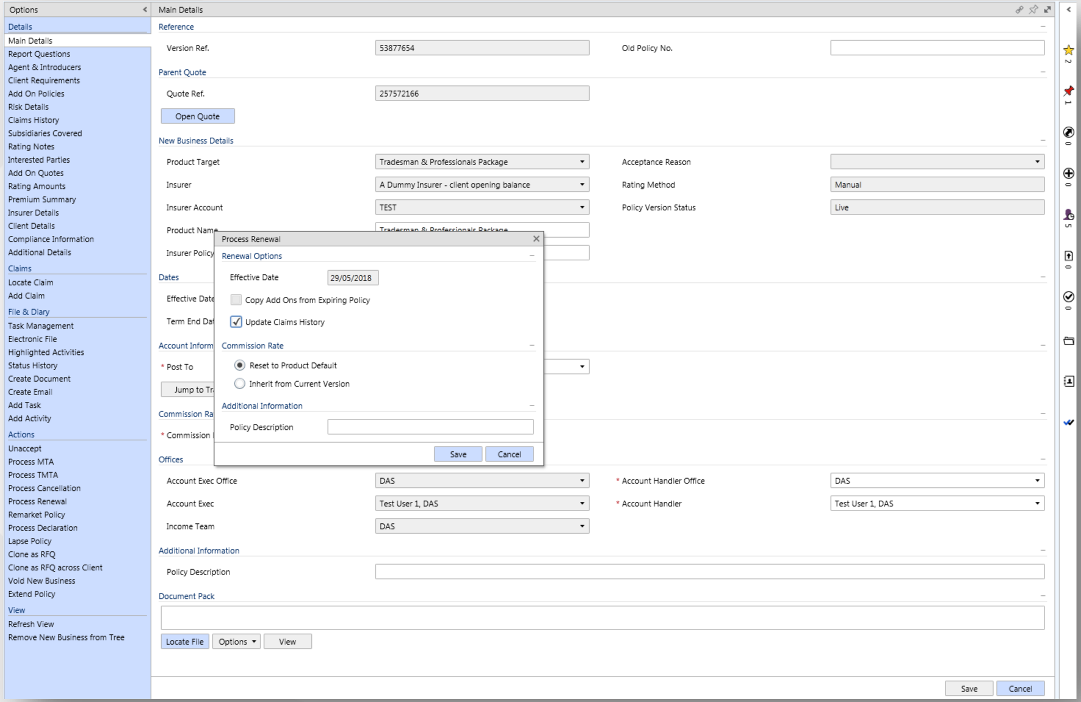


When selecting to **Process Renewal**, a pop up will appear.

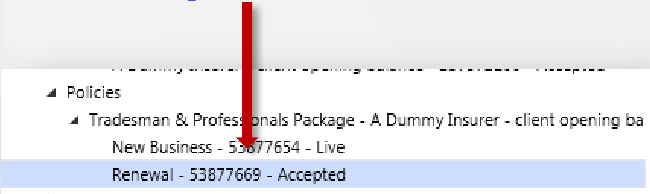
If the client requires any adjustments to their policy, you will need to complete the **Risk Details** section, as previously shown when completing an RFQ.

Click **Save** once complete then submit.

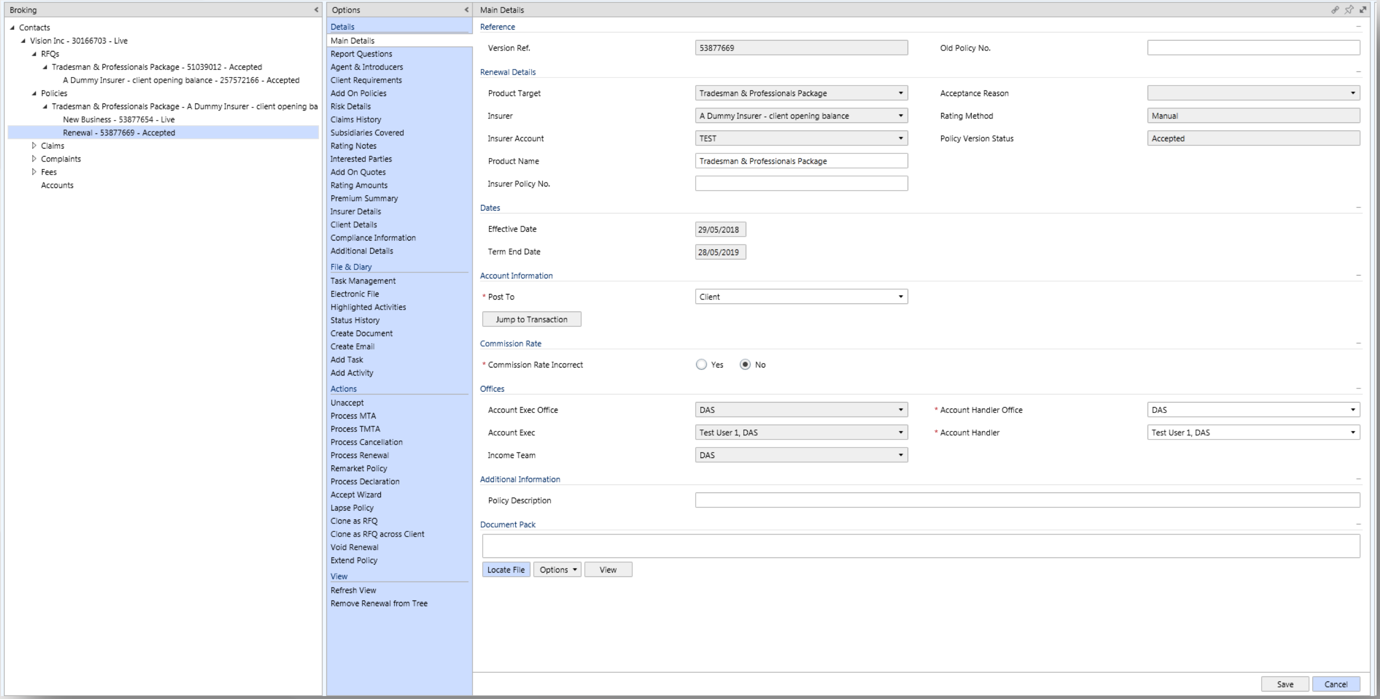
Renewals



Once the relevant sections have been updated, click on **Accept Wizard** and, as previously shown when accepting a policy, ensure the details are correct on each screen and click **Next**. Once accepted, the renewed policy will show as **Live** in the **Broking** column.



Renewals



Issue documents as per your business procedure.

The policy is now renewed.