



AR Portal User Guide

Policy Administration (MTA and MTC)

Introduction

The purpose of this document is to outline the processes and guidance for the Appointed Representative Portal

Contents

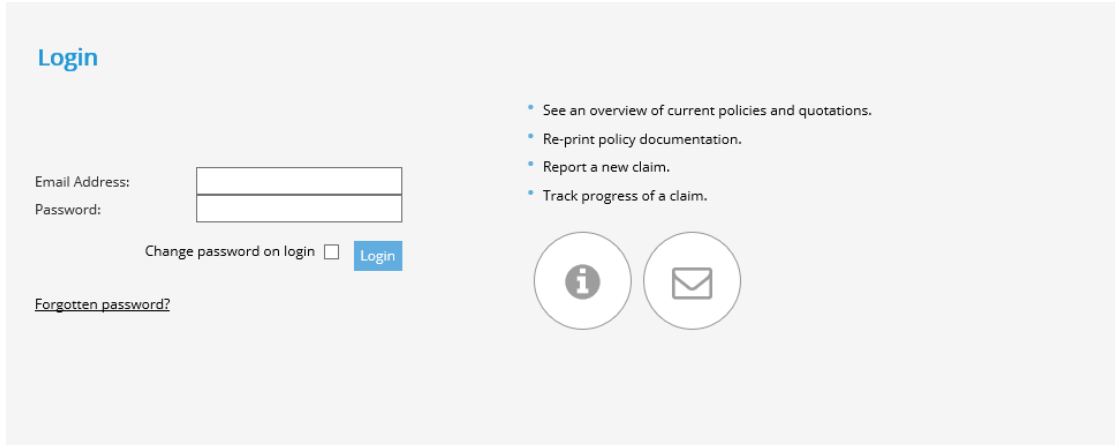
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Logging In

The following link enables you to access the login screen

<https://portal.compassinsuranceservices.co.uk/Extranet/>

This will bring up the following screen



The screenshot shows a login interface with the title "Login" in blue. On the left, there are two input fields labeled "Email Address:" and "Password:". Below the "Password:" field is a checkbox labeled "Change password on login" and a blue "Login" button. A link "Forgotten password?" is located below the input fields. On the right, there is a list of four features: "See an overview of current policies and quotations.", "Re-print policy documentation.", "Report a new claim.", and "Track progress of a claim.". Below the list are two circular icons: one with an 'i' (information) and one with an envelope (email).

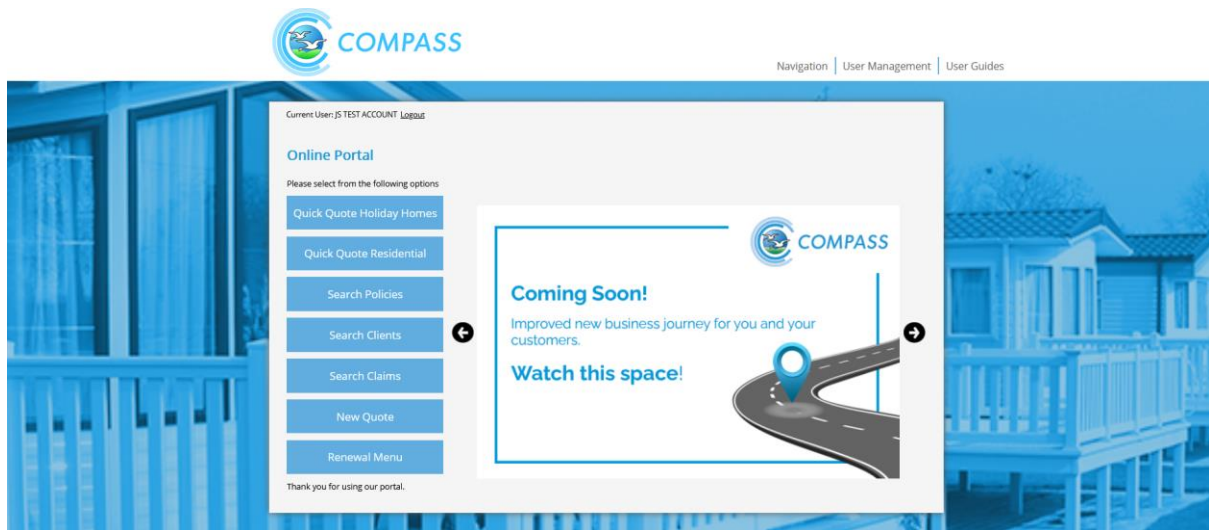
You will be issued with

- Username
- Password

Enter these into the fields shown and click **Logon**

Basic Navigation

The home screen of the portal is as follows



From this screen there are quick links to

- Quick Quote Holiday
- Quick Quote Residential
- Search Policies
- Search Clients
- Search Claims
- New Quote
- Renewal Menu

At the bottom of the screen there are also links to Compass information and websites for the user to follow.

The Navigation drop down also allows the user to access various parts of the Portal from any screen in the portal.

The portal does not allow use of the **Back** button on the users browser and navigation through the screens should only be done using the navigation built into the portal itself



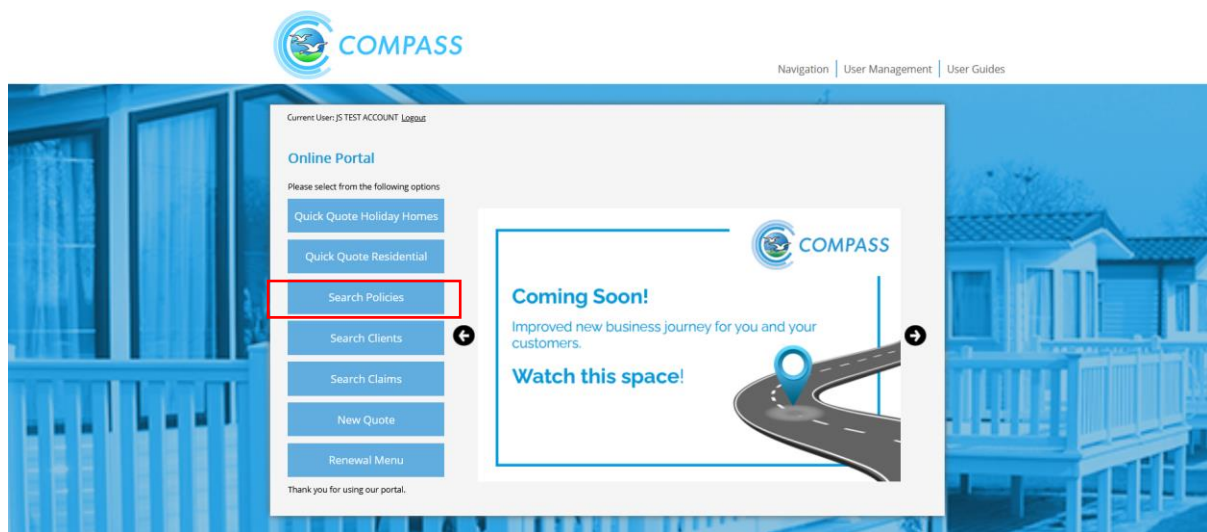
Oops!

Please do not use browser navigation buttons. Please use the navigation buttons that this application provides.

Okay

Accessing the Policy

Locate the policy you want to make a change to from the main screen by selecting Search Policies.



This will bring up the Policy Search screen, initially showing all Quotes and Policies. You can filter the search using the options at the top of the screen.

Search

Search for Policies | Search / Add Clients | Search Claims

Policy Holder:

Quote ID:

Certificate Number:

Status:

Property Type:

Park:

Pitch Number:

Policy Type:

Search

| Policy Holder | Property Type | Park | Pitch No | Status | Cover From | Cover To | Quote Date | Quote ID/Certificate No | |
|----------------------|---------------|--------------------------|----------|--------|------------|------------|------------|-------------------------|--------|
| Mr Portal QuickQuote | | Tan Yr Ogof Caravan Park | A123 | Quote | 01/01/2020 | 29/09/2020 | | 16447705 | Select |

Locate the policy you want to make the change to and click on Select, the Policy Options screen will appear.

Policy Menu - Holiday Home Insurance - xx xxxxxxxx

Proposer: xx xxxxxxxx
Cover From: 13 October 2019
Agent: x x xxxxxxxx x xxx
Correspondence Address: xxx xxxxxx xxx xxxxx, xxx xxxxx, xxxxxxxx, XXXX XXX

Policy Status: OnRisk
Cover To: 29 September 2020

| Year | Status | Sub Status | Quote Date | Cover From | Cover To | Total Premium | Tax/Levy/Duty | Select |
|------|--------|------------|-----------------|-----------------|-------------------|---------------|---------------|--------|
| 2019 | OnRisk | | 13 October 2019 | 13 October 2019 | 29 September 2020 | £217.66 | £23.32 | Select |

Holiday Home Insurance

Policy No: 1638104
Client ID: CMPC302304
Cert No: CMPCHH191638104

Proposer: xx xxxxxxxx
Country:
Currency: £

[Client Details](#)
[MTA Quote](#)
[Documents](#)
[Claims](#)
[Cancel](#)
[Exit](#)

Changing Client Details

From this screen select MTA Quote and this will bring up the Change Details screen

Holiday Home Insurance - xx xxxxxxxx

Holiday Home Insurance

Quote No: 16447905
Insured ID: CMPC302304
Cert No: CMPCHH191638104

Change Details

When is the change effective from? *

Is this a Replacement holiday home? * ☐ No ☐ Yes

Client Details

Client: xx xxxxxxxx
 Correspondence Address: xxx xxxxxx xxx xxxxx, xxx xxxxx, xxxxxxxx, SK14 5NP

[Update Client](#)

Joint Policy Holder(s)? ☐

Holiday Home Details

What is the name of the park that the property resides in? *

What is the pitch number?

Fitted with floatation device? ☐ Yes ☒ No

Holiday Home Sum Insured

What is the value of the property insured? *

What is the value of the contents insured? *

Confirm Quote Declaration

I/we declare that the statements and particulars given in this proposal are, to the best of my/our knowledge and belief, true and complete, that the sums insured will be maintained on a true and up to date basis and that this proposal shall form the basis of the contract between me/us and Binnacle Insurance Services Limited. ☐

To change the client details, select Update Client and follow the following screens to make the change.

Client Information

Please update the details of your client

Individual Details

Title *
First Name(s) *
Last Name *

Contact Details

Country *
Postcode
Address *
Phone Number
Mobile Phone
Email Address

Please note that fields marked with an * are mandatory.

Cancel Next

Updating the details and selecting Next will take you back to the Change details screen.

Changing Policy Details

To change the Policy details, access the Change details screen below

Holiday Home Insurance - xx xxxxxxxx

Change Details

When is the change effective from? *

Is this a Replacement holiday home? * ☐ No ☒ Yes

Client Details

Client

Correspondence Address

Joint Policy Holder(s)? ☐

Holiday Home Details

What is the name of the park that the property resides in? *

What is the pitch number?

Fitted with floatation device? ☐ Yes ☒ No

Holiday Home Sum Insured

What is the value of the property insured? *

What is the value of the contents insured? *

Confirm Quote Declaration

I/we declare that the statements and particulars given in this proposal are, to the best of my/our knowledge and belief, true and complete, that the sums insured will be maintained on a true and up to date basis and that this proposal shall form the basis of the contract between me/us and Binnacle Insurance Services Limited. ☐

There are two types of change you can make

1. Change to an existing Holiday Home
2. Change of Holiday Home

These changes are generated from the 'Is this a Replacement holiday home?' question.

Change to and Existing Holiday Home

Selecting 'No' results in the following fields being available to change

| | |
|--|---|
| When is the change effective from? | Select the date the change is required from |
| What is the pitch number? | Input any change to the pitch number |
| What is the value of the property insured? | Enter the new value |
| What is the value of the contents insured? | Enter the new value |

Tick the declaration box and then Calculate and the following screen will appear

Quote Summary - Holiday Home Insurance - Mr Test Tester

Quote Details

Cover From 31 December 2019

Cover To 29 September 2020

MTA Premium

£27.25

Premium Breakdown

£24.33 + £2.92 IPT

The premium above is the amount payable for cover from the Cover From and Cover To dates, and includes administration fees and applicable duties/levies/taxes where applicable.

If your cover period is less than a full year this will be a pro rata amount of your annual premium. A full breakdown is provided on your documentation.

Breakdown of Cover

| Coverage | Home Address | CCY | Sum Insured | Total Premium |
|--------------------------|--|-----|-------------|---------------|
| Tan Yr Ogor Caravan Park | xxx xxxxxxx xxx xxx, xxx xxx xxx, xxxxxxx, SK14 5NP | GBP | 36,000 | 244.91 |

This quotation is valid for 30 days

Your quotation has been based on the information provided. If this is accepted the contract of insurance will incorporate all the terms of the Underwriters standard policy wording including its conditions, exclusions and warranties.

Holiday Home Insurance

Quote No: 16447905

Proposer: Mr Test Tester

Country: United Kingdom

Currency: £

Quote Date:

Email MTA Quote

Edit Quote

Policy Summary

Refer to UW

Proceed to Cover

The screen shows the following

| | |
|-------------------|------------------------------------|
| Cover From | 31 December 2019 |
| Cover To | 29 September 2020 |
| Cost of the MTA | £27.25 in this example |
| Premium Breakdown | £24.33 + £2.92 IPT in this example |
| Annual Premium | £244.91 in this example |

From here you can

- Email the MTA Quote (this will generate documents)
- Edit the Quote
- Proceed to Cover

Changing to a New Holiday Home

Selecting 'Yes' to the replacement holiday home question brings up a different variation of the Change details screen with more fields available.

Holiday Home Insurance - Mr Test Tester

Holiday Home Insurance

Quote No: 16447905

Insured ID: CMPC302304

Cert No: CMPCHH191638104

Change Details

When is the change effective from? *

Is this a Replacement holiday home? * ☐ No ☒ Yes

Client Details

Client Mr Test Tester

Correspondence Address xxx xxxxxx xxx xxxxx, xxx xxxxx, xxxxxxxx, SK14 5NP, United Kingdom

[Update Client](#)

Joint Policy Holder(s)? ☐

Holiday Home Details

what is the type of property/caravan to be insured? *

What type of cover is required? *

What is the pitch number?

What is the Holiday Home's year of manufacture? *

What is the Holiday Home's make?

What is the Holiday Home's model?

Fitted with floatation device? ☐ Yes ☒ No

What is the Property size Width (ft)

What is the Property size Length (ft)?

Serial Number

You can enter the details of the new Holiday Home (not all fields are mandatory)

| | |
|---|---|
| When is the change effective from? | Select the date the change is required from |
| What is the type of property / caravan to be insured? | Select the new type of unit |
| What type of cover is required? | Select New for Old or Market Value |
| What is the pitch number? | Input any change to the pitch number |
| What is the year of manufacture? | Enter the year |
| What is the Holiday Home's make? | Select the make or enter 'Other' |
| What is the Holiday Home's model? | Enter the model |
| What is the Property size Width? | Enter the width |
| What is the Property size Length? | Enter the length |
| Serial Number | Enter the serial number |
| What is the value of the property insured? | Enter the new value |
| What is the value of the contents insured? | Enter the new value |

Once you have entered all the details tick the declaration box and then Calculate

Confirm Quote Declaration

I/we declare that the statements and particulars given in this proposal are, to the best of my/our knowledge and belief, true and complete, that the sums insured will be maintained on a true and up to date basis and that this proposal shall form the basis of the contract between me/us and Binnacle Insurance Services Limited. ☒

Please note that fields marked with an * are mandatory.

[Exit](#) [Save](#) [Calculate](#)

The following screen will appear

Quote Summary - Holiday Home Insurance - Mr Test Tester

Quote Details

Cover From 31 December 2019
Cover To 29 September 2020

MTA Premium £57.22
Premium Breakdown £51.09 + £6.13 IPT

The premium above is the amount payable for cover from the Cover From and Cover To dates, and includes administration fees and applicable duties/levies/taxes where applicable.

If your cover period is less than a full year this will be a pro rata amount of your annual premium. A full breakdown is provided on your documentation.

Breakdown of Cover

| Coverage | Home Address | CCY | Sum Insured | Total Premium |
|--------------------------|--|-----|-------------|---------------|
| Tan Yr Ogof Caravan Park | xxx xxxxxx, xxx xxxxx, xxx xx xxx, xxxxxxxx, SK14 5NP | GBP | 41,500 | 274.88 |

This quotation is valid for 30 days

Your quotation has been based on the information provided. If this is accepted the contract of insurance will incorporate all the terms of the Underwriters standard policy wording including its conditions, exclusions and warranties.

Holiday Home Insurance
Quote No: 16447905

Proposer: Mr Test Tester
Country: United Kingdom
Currency: £
Quote Date:

[Email MTA Quote](#)
[Edit Quote](#)
[Policy Summary](#)
[Refer to UW](#)
[Proceed to Cover](#)

The screen shows the following

| | |
|-------------------|------------------------------------|
| Cover From | 31 December 2019 |
| Cover To | 29 September 2020 |
| Cost of the MTA | £57.22 in this example |
| Premium Breakdown | £51.09 + £6.13 IPT in this example |
| Annual Premium | £274.88 in this example |

From here you can

- Email the MTA Quote (this will generate documents)
- Edit the Quote
- Proceed to Cover

Accepting an MTA Quote

To accept an MTA Quote locate and select the Policy and the following screen appears

Policy Menu - Holiday Home Insurance - Mr Test Tester

Proposer: Mr Test Tester
Cover From: 13 October 2019
Agent: x x xxxxxxxx x xxx
Correspondence Address: xxx xxxxxx xxx xxxxx, xxx xxxxx, xxxxxxxx, SK14 5NP, United Kingdom

Policy Status: MTA Quote
Cover To: 29 September 2020

| Year | Status | Sub Status | Quote Date | Cover From | Cover To | Total Premium | Tax/Levy/Duty | Select |
|------|--------|------------|------------------|-----------------|-------------------|---------------|---------------|--------|
| 2019 | Quote | MTA | 31 December 2019 | 13 October 2019 | 29 September 2020 | £57.22 | £6.13 | |
| 2019 | OnRisk | | 13 October 2019 | 13 October 2019 | 29 September 2020 | £217.66 | £23.32 | Select |

Holiday Home Insurance
Policy No: 16447905
Client ID: CMPC302304
Cert No: CMPCHH191638104

Proposer: Mr Test Tester
Country: United Kingdom
Currency: £

[Client Details](#)
[Edit MTA Quote](#)
[Documents](#)
[Exit](#)

You can see that as well as the On Risk policy there is now a line for the MTA Quote. Select MTA Quote and confirm that none of the details have changed on the following screen.

Holiday Home Insurance - Mr Test Tester

Change Details

When is the change effective from? *

Is this a Replacement holiday home? * ☐ No ☒ Yes

Client Details

Client Mr Test Tester
Correspondence Address xxx xxxxxx xxx xxxxx, xxx xxxxx, xxxxxxxx, SK14 5NP, United Kingdom
[Update Client](#)

☐ Joint Policy Holder(s)?

Holiday Home Details

what is the type of property/caravan to be insured? *

What type of cover is required? *

What is the pitch number?

What is the Holiday Home's year of manufacture? *

What is the Holiday Home's make?

What is the Holiday Home's model?

Fitted with floatation device? ☐ Yes ☒ No

What is the Property size Width (ft)

What is the Property size Length (ft)?

Serial Number

Select Calculate and the Quote Summary will appear.

Quote Summary - Holiday Home Insurance - Mr Test Tester

Quote Details

Cover From 31 December 2019

Cover To 29 September 2020

MTA Premium

£57.22

Premium Breakdown

£51.09 + £6.13 IPT

The premium above is the amount payable for cover from the Cover From and Cover To dates, and includes administration fees and applicable duties/levies/taxes where applicable.

If your cover period is less than a full year this will be a pro rata amount of your annual premium. A full breakdown is provided on your documentation.

Breakdown of Cover

| Coverage | Home Address | CCY | Sum Insured | Total Premium |
|--------------------------|--|-----|-------------|---------------|
| Tan Yr Ogof Caravan Park | xxx xxxxxx xxx xxxxx, xxx xxx xxx, xxxxxxxx, SK14 5NP | GBP | 41,500 | 274.88 |

This quotation is valid for 30 days

Your quotation has been based on the information provided. If this is accepted the contract of insurance will incorporate all the terms of the Underwriters standard policy wording including its conditions, exclusions and warranties.

Holiday Home Insurance

Quote No: 16447905

Proposer: Mr Test Tester

Country: United Kingdom

Currency: £

Quote Date:

Email MTA Quote

Edit Quote

Policy Summary

Refer to UW

Proceed to Cover

Clicking Procceed to Cover will transact the MTA and generate the documents

The MTA policy will now show as TakenUp on the Policy Menu

| Year | Status | Sub Status | Quote Date | Cover From | Cover To | Total Premium | Tax/Levy/Duty | Select |
|------|---------|------------|--------------|--------------|-------------|---------------|---------------|--------|
| 2020 | TakenUp | MTA | 12 June 2020 | 12 June 2020 | 31 May 2021 | £81.47 | £8.73 | Select |
| 2020 | OnRisk | Renewal | 10 June 2020 | 01 June 2020 | 31 May 2021 | £127.67 | £13.68 | |

The MTA confirmation documents can be found here

| Year | Status | Sub Status | Quote Date | Cover From | Cover To | Total Premium | Tax/Levy/Duty | Select |
|------|---------|------------|--------------|--------------|-------------|---------------|---------------|--------|
| 2020 | TakenUp | MTA | 12 June 2020 | 12 June 2020 | 31 May 2021 | £81.47 | £8.73 | Select |
| 2020 | OnRisk | Renewal | 10 June 2020 | 01 June 2020 | 31 May 2021 | £127.67 | £13.68 | |
| 2020 | Renewed | MTA | 12 June 2020 | | 31 May 2020 | £0.00 | £0.00 | Select |
| 2020 | Renewed | | 21 May 2020 | 30 May 2020 | 31 May 2020 | £0.26 | £0.03 | Select |

Client Details

MTA Quote

Documents

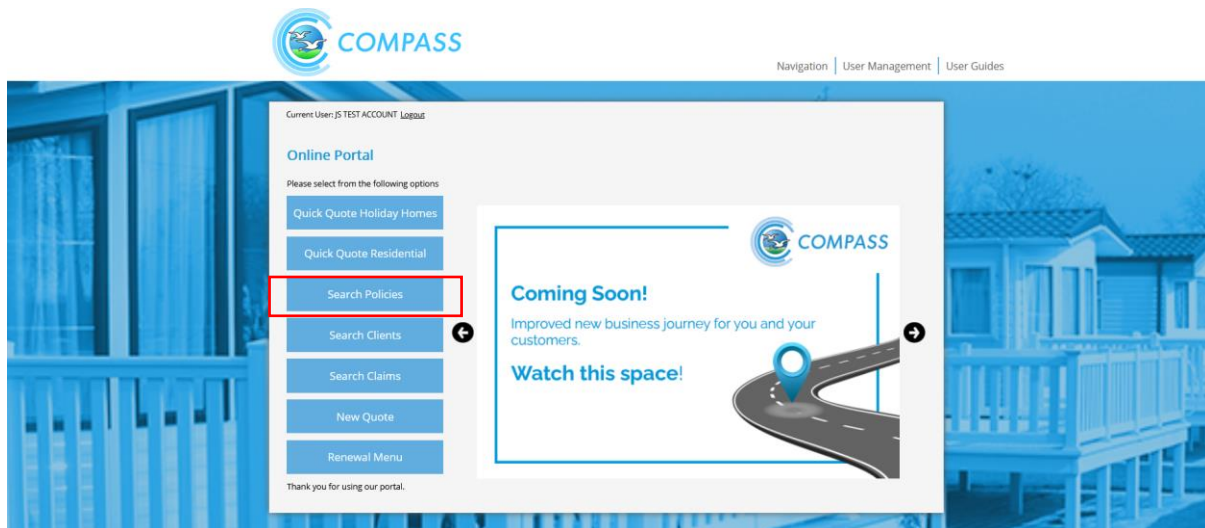
Claims

Cancel

Exit

Cancelling a Policy

To cancel a Policy, first select the policy using the Main Screen



This will bring up the Policy Search screen, initially showing all Quotes and Policies. You can filter the search using the options at the top of the screen.

Search

Search for Policies | Search / Add Clients | Search Claims

Policy Holder:

Quote ID:

Certificate Number:

Status:

Property Type:

Park:

Pitch Number:

Policy Type:

| Policy Holder | Property Type | Park | Pitch No | Status | Cover From | Cover To | Quote Date | Quote ID/Certificate No |
|----------------------|---------------|--------------------------|----------|--------|------------|------------|------------|---------------------------------------|
| Mr Portal QuickQuote | | Tan Yr Ogof Caravan Park | A123 | Quote | 01/01/2020 | 29/09/2020 | 16447705 | <input type="button" value="Select"/> |

Locate the policy you want to cancel and click on Select, the Policy Options screen will appear.

Policy Menu - Holiday Home Insurance - xxx xxxxxxxx xxxxxx

Proposer: xxx xxxxxxxx xxxxxx
Cover From: 04 October 2019
Agent: x x xxxxxxxx x xxx
Correspondence Address: xxx xxxxxxxx xxx, xxxxxx, xxxxxxxx, XXX XXX, United Kingdom

Policy Status: OnRisk
Cover To: 29 September 2020

Holiday Home Insurance
Policy No: 1613434
Client ID: CMPC480764
Cert No: CMPCHH191613434

Proposer: xxx xxxxxxxx xxxxxx
Country: United Kingdom
Currency: £

| Year | Status | Sub Status | Quote Date | Cover From | Cover To | Total Premium | Tax/Levy/Duty | Select |
|------|--------|------------|-------------------|-----------------|-------------------|---------------|---------------|--------|
| 2019 | OnRisk | | 30 September 2019 | 04 October 2019 | 29 September 2020 | £237.26 | £25.42 | Select |

Client Details
MTA Quote
Documents
Claims
Cancel
Exit

Click on Cancel and complete the following screen

Holiday Home Insurance - xxx xxxxxxxx xxxxxx

Holiday Home Insurance
Policy No: 1613434
Insured ID: CMPC480764
Cert No: CMPCHH191613434

Cancellation date
When would you like the Cover to end from? *
dd/MM/yyyy
Cancellation Reason *

Confirm Declaration
Are you aware of any claims, or incidents that may give rise to a claim, that have not been reported to us? *
☒ No ☐ Yes

Please note that fields marked with an * are mandatory.

Policy Menu Calculate

Once you have entered the details select Calculate, this will bring up the summary of the Cancellation

Premiums for Changes

Any additional or return premiums will appear on your monthly statement as a credit or debit and be payable on the terms of that statement.

You should return any premium due back to the customer or take any additional premium from the customer at the point of the transaction.