



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

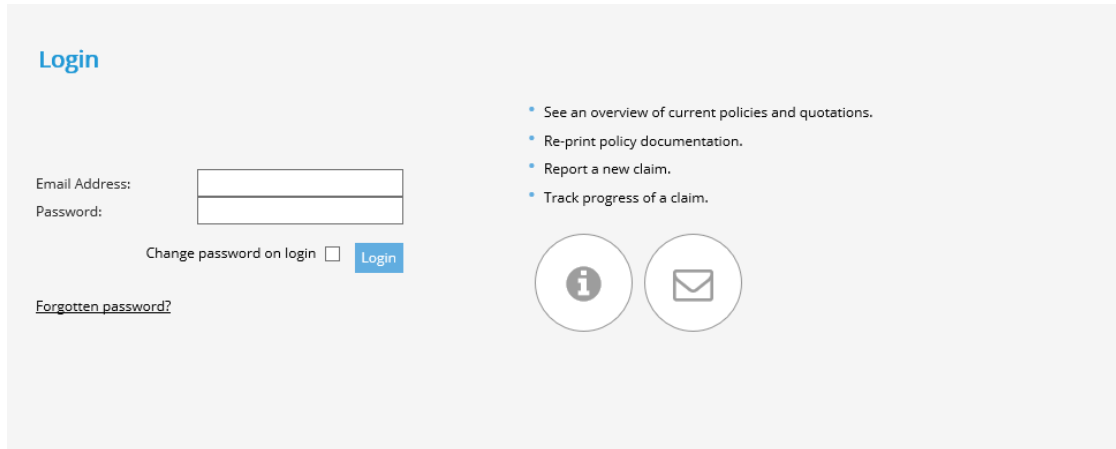
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Logging In

The following link enables you to access the login screen

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

This will bring up the following screen



Login



Email Address:

Password:

Change password on login **Login**

[Forgotten password?](#)

- See an overview of current policies and quotations.
- Re-print policy documentation.
- Report a new claim.
- Track progress of a claim.

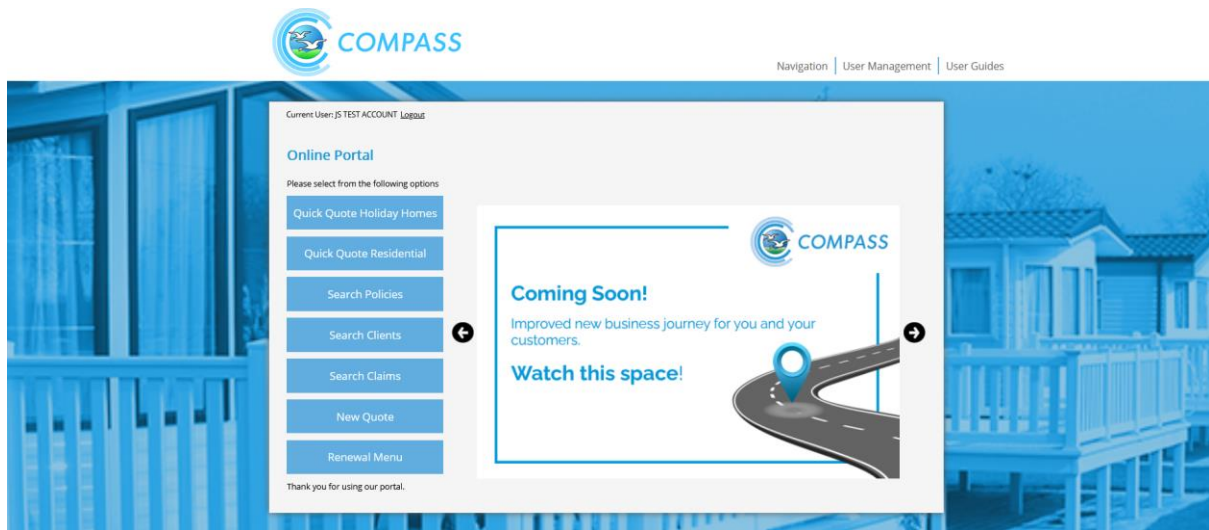
You will be issued with

- 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



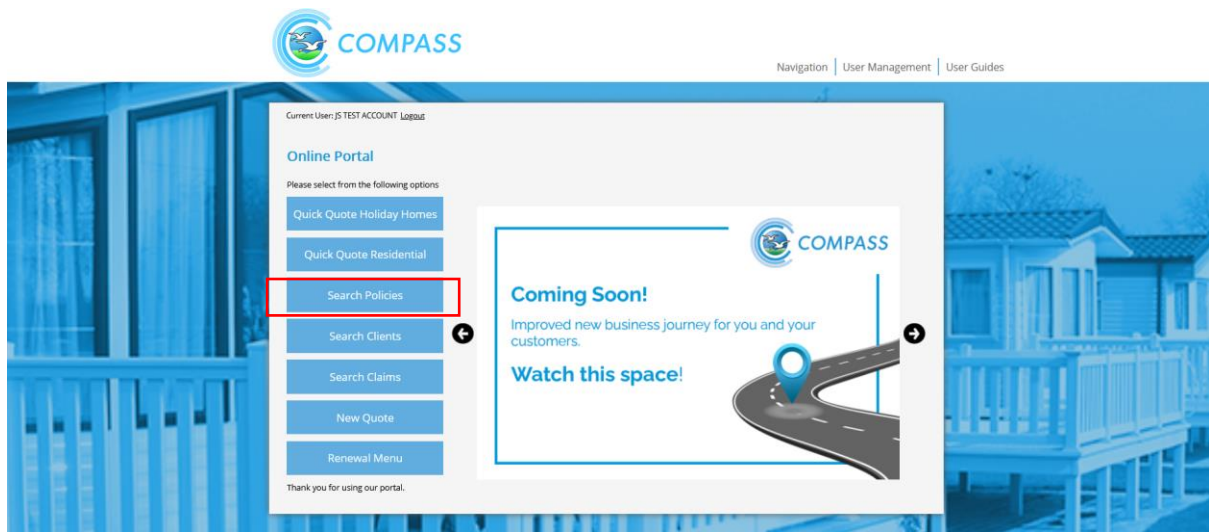
Oops!

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

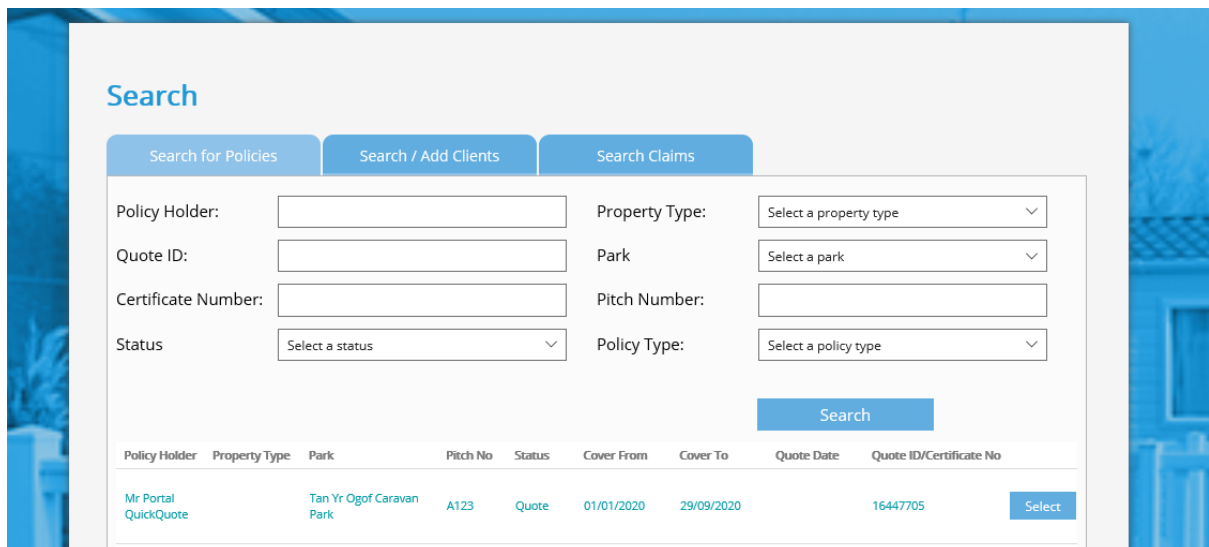
Okay

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.



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 **Policy Status:** OnRisk
Cover From: 13 October 2019 **Cover To:** 29 September 2020
Agent: x x xxxxxxxx x xxx
Correspondence Address: xxx xxxxxx xxx xxxxx, xxx xxxxx, xxxxxxxx, XXXX XXX

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.

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

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 Ogof Caravan Park	xxx xxxxxx xxx xxxxx, xxx xx xxx, xxxxxxxx, 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 xxxxx xxxxxx, xxx xxxxxx, xxxxxxxxx, 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 **Policy Status:** MTA Quote
Cover From: 13 October 2019 **Cover To:** 29 September 2020
Agent: x x xxxxxxxx x xxx
Correspondence Address: xxx xxxxxx xxxxxx xxxxxx, xxx xxxxxx, xxxxxxxx, SK14 5NP, United Kingdom

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 xxxxxx xxxxxx, xxx xxxxxx, xxxxxxxx, SK14 5NP, United Kingdom

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 xxxxxx, 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 Proceed 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	

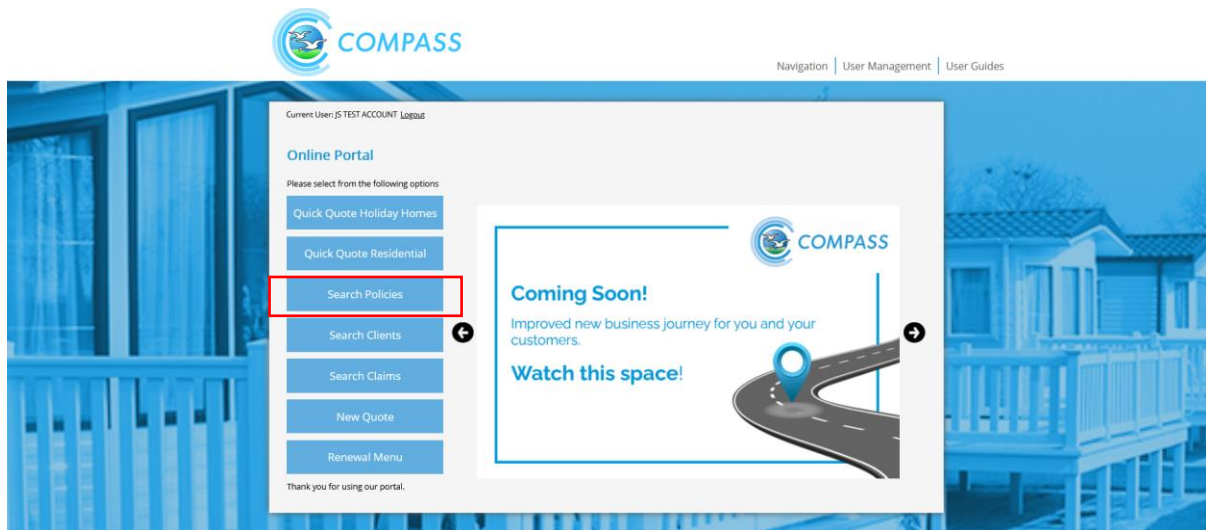
The MTA confirmation documents can be found here

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

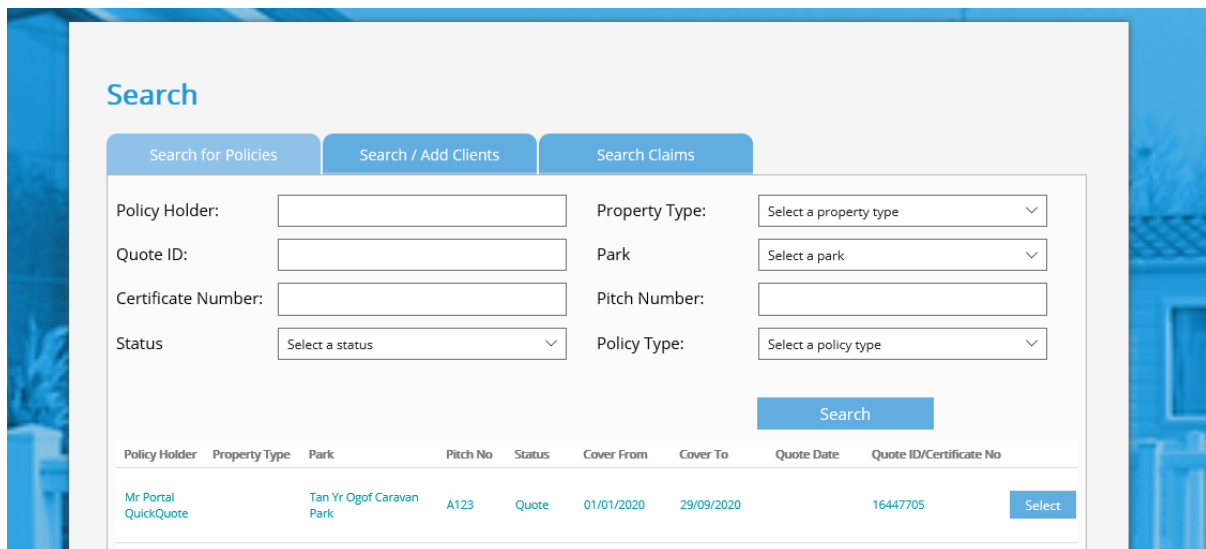
- [Client Details](#)
- [MTA Quote](#)
- [Documents](#)
- [Claims](#)
- [Cancel](#)
- [Exit](#)

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.



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 xxxxxxxx **Policy Status:** OnRisk
Cover From: 04 October 2019 **Cover To:** 29 September 2020
Agent: x x xxxxxxxx x xxx
Correspondence Address: xx xxxxxxxx xxx, xxxxxx, xxxxxxxx, XXX XXX, United Kingdom

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

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

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

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? *

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

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? *

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.

Return Premium	Premium Breakdown
£-179.58	£-160.34 + £-19.24 IPT

This shows the following

Cover End	31 December 2019
Return Premium due	-£179.58 in this example
Premium Breakdown	-£160.34 + -£19.24 IPT in this example

Select Proceed and the Policy Menu screen appears with the Policy Status as Cancelled

Policy Menu - Holiday Home Insurance - xxx xxxxxxxx xxxxxx

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

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

Proposer: xxx xxxxxxxx xxxxxx **Policy Status:** Cancelled

Cover From: 04 October 2019 **Cover To:** 29 September 2020

Agent: x x xxxxxxxx x xxx

Correspondence Address: xx xxxxxxxx xxx, xxxxxx, xxxxxxxx, XXX XXX, United Kingdom

Year	Status	Sub Status	Quote Date	Cover From	Cover To	Total Premium	Tax/Levy/Duty	Select
2019	Cancelled		30 September 2019	04 October 2019	29 September 2020	£57.68	£6.18	<input type="button" value="Select"/>

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.