



# Broker Portal User Guide

## REGISTERING FOR THE BROKER PORTAL

The following is a step-by-step guide on the registration process for the Brooklyn Portal:

- Go to <http://www.brooklynunderwriting.com.au>
- Click on 'Login' at the top of the page
- Click the "Click here to register" link next to login fields

- Fill in the fields including business name, address and an individual email address associated with the business

- Please note once 'Register' has been clicked, a note advising the request is being processed will be displayed. No further action is required on your behalf, and this will generally take 1-2 business days for an existing Broker office

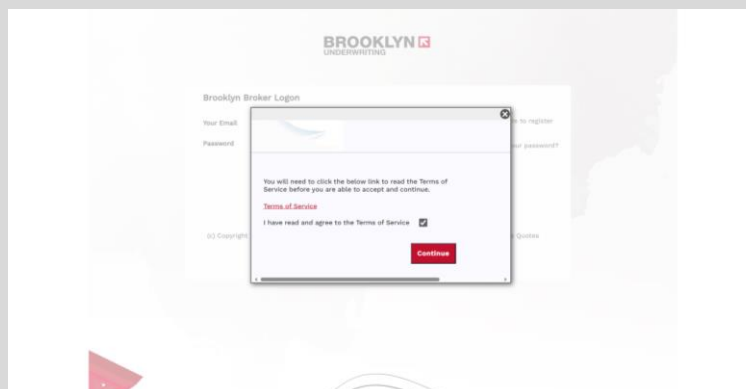
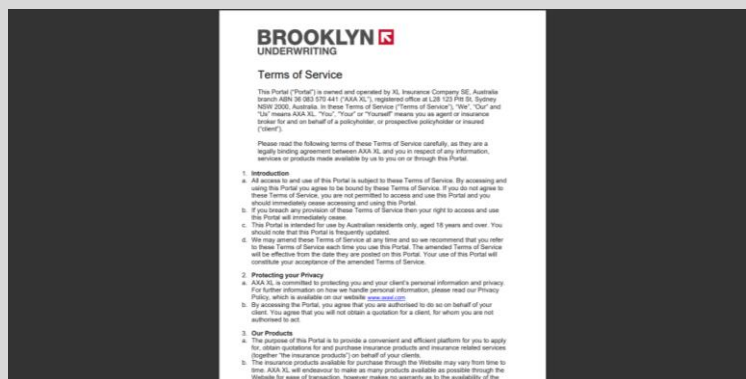


## ACCEPTING TERMS OF SERVICE

Please note the first time you log in to the Brooklyn broker portal you will be required to accept the Terms of Service



To accept these terms you must open the document to confirm you have read the terms to proceed further

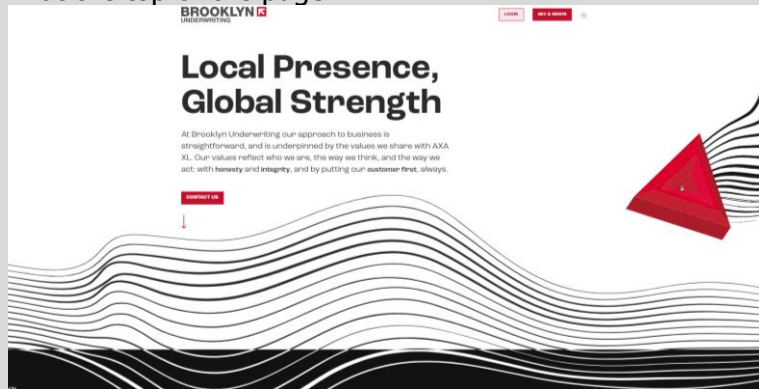




## LOGGING IN TO THE BROKER PORTAL

The following is a step-by-step guide on logging in to the Brooklyn broker portal:

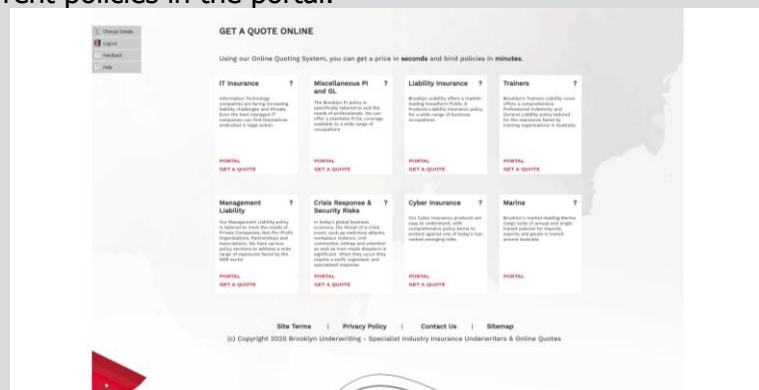
- Go to <http://www.brooklynunderwriting.com.au>
- Click on 'Login' at the top of the page



- Login to the portal by using your 'username' and 'password'



- You will be provided with various insurance products, each with an option to quote or view any current policies in the portal.



*Note: If the keyed-in underwriting information is outside our standard terms, a referral will be triggered and an intimation will be directly sent to one of our Underwriters for further action)*



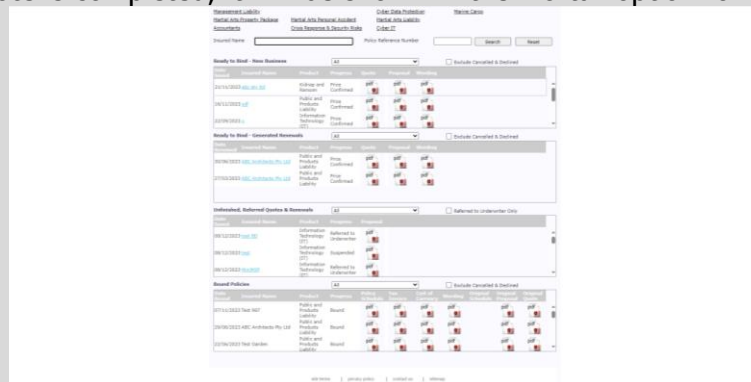
## NEW QUOTATION

The following is a step-by-step procedure to obtain a new quotation using our Broker Portal:

- Login to the portal by using your 'username' and 'password'
- Click 'Get a Quote' under the relevant class of Insurance
- Make sure you are carefully reading all questions and prompts and providing as much relevant information as possible
- In sections that require additional information, please be as descriptive and clear for the underwriting team as possible, to ensure the process is expedited
- Once the quote is completed, it will be shown under 'existing quotes/renewal' for retrieval



- Key-in the requested information and follow the steps until finish
- Once the quote is completed, it will be shown in the 'Portal' option for retrieval



*Note: If the keyed-in underwriting information is outside our standard terms, a referral will be triggered and an intimation will be directly sent to one of our Underwriters for further action).*  
*Note: You need to ensure that the main portion of the occupation is identified correctly when quoting. For example if 70% of work undertaken is Tree Lopping and 30% is Garden Maintenance, this would mean Tree Lopping is the main occupation.*







## Portal FAQs

### Q1. My login and password doesn't work – what can I do?

Try the following:

- Refresh the browser with Ctrl+F5
- Reset the Password
- Contact [info@brooklynunderwriting.com.au](mailto:info@brooklynunderwriting.com.au) for further investigation

### Q2. How can I get a new login/password for a new staff member?

Go onto our website [www.brooklynunderwriting.com.au/online-tools](http://www.brooklynunderwriting.com.au/online-tools) and sign up, or alternatively, email [info@brooklynunderwriting.com.au](mailto:info@brooklynunderwriting.com.au) with the name of the staff member and email address and your office details.

*Note: It is your responsibility to inform Brooklyn Underwriting when an employee login needs to be deactivated.*

### Q3. What products are available online?

Currently the products available online include:

- Miscellaneous PI
- Trainers
- Management Liability
- Information Technology
- Cyber
- General Liability
- Crisis Response & Security Risks

For any other products, please send through a manual submission.

A list of contacts and generic inboxes can be found located in the View Contacts button on our website <https://www.brooklynunderwriting.com.au/contact-us>.

### Q4. The system won't allow me to access my renewal, what do I do?

Please send a proposal form to your relevant contact or generic inbox, as we will need to review the account manually.

A list of contacts and generic inboxes can be found located in the View Contacts button on our website <https://www.brooklynunderwriting.com.au/contact-us>.



**Q5. The system says the quote is an ABN match and is held with another broker, but I am the holding broker – what does this mean?**

This means you (or another broker) have quoted this risk before and there is an existing client profile in the system. Please contact us for further investigation.  
Please note an ABN must be provided (TBA or similar will not be accepted). In the instances where the same ABN has previously been used in our portal, we will need to contact you to confirm details to ensure there are no conflicts of interest, and details are correct.

**Q6. What is quote reference number?**

If the quote refers on the system, you will receive a quote reference number which ends with \*Q – please provide us with this reference number in your correspondence to us to help expedite answering any queries or issues.

**Q7. Where can I get the certificate of currency from?**

Once a policy has been bound, a certificate of currency and policy schedule is emailed to you. Please check your junk email folder if it does not arrive in your inbox  
*Note: Certificate of currencies are not generated for Management Liability policies.*

**Q8. How can I action Endorsements, including business name changes and increased limit of indemnity?**

Any endorsements that need to be raised will need to be sent by email to the relevant inbox to be undertaken manually. Additional information may be requested.  
A list of contacts and generic inboxes can be found located in the View Contacts button on our website <https://www.brooklynunderwriting.com.au/contact-us>.

**Q9. Inherited risks from another member of your team ?**

In order to access the risk on the portal you will need to send an email to the respective inbox clarifying that you are the updated broker so we can transfer the updated risk contact details from your email.  
A list of contacts and generic inboxes can be found located in the View Contacts button on our website <https://www.brooklynunderwriting.com.au/contact-us>.





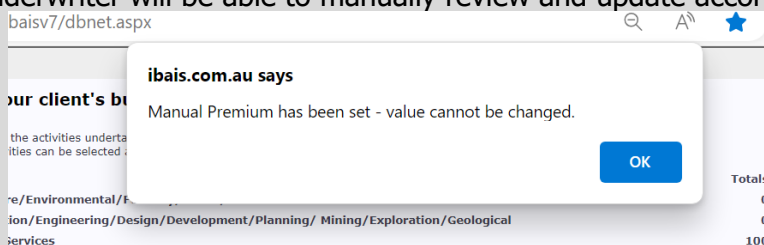
#### **Q10. Do I have to send a closing after a policy has been bound online?**

Yes, please send a closing to the relevant email address indicated in the confirmation of cover email.

Once your closing is received and we have reviewed finding that details are inconsistent, a member of our team will reach out to confirm any queries.

#### **Q11. There is a manual premium in the portal that I can not update, what should I do?**

Please send through a completed record of answers through to the respective line of business inbox and the Underwriter will be able to manually review and update accordingly.



#### **Q12. My policy has been referred, what should I do?**

Our Underwriting team will reach out to you shortly, however to ensure prompt action please begin filling out the relevant proposal form to assist with this process.

#### **Q13. My client is stamp duty exempt but I can see stamp duty charges on the quote obtained from the portal, what should I do?**

Please have your client complete a stamp duty exemption declaration and provide to the relevant inbox for one of our Underwriters to review and remove stamp duty in instances where this applies.