

# Multi-Broker Insurance Validation

## Subcontractor – Requesting Validation

From the subcontractor side there is now only 'Insurance' on the menu; we no longer have it split between Details and Validation

Selecting the Insurance section on the menu shows:

**What is Insurance Validation?** Insurance Validation is the process of getting your Insurance Broker to confirm and/or enter your insurance details. Some Main Contractors **require** Insurance Validation.

If you **DO** have an Insurance Broker to validate your insurance, please complete the Broker information, select the Broker for each type of insurance and then go to the **Validation** page.  
If you **DO NOT**, you will need to fill out all your Insurance details yourself.

For a more detailed explanation of the Insurance Broker Validation process click [here](#)

If the Name of Insured as shown on your insurance policies is not exactly the same as your Registered company name, please explain the nature of the relationship.  
Relationship to Insured

Under the Broker tab, the subcontractor can complete the details of the broker(s) and click on save, the details are saved and displayed in the grid below:

Use the grid below to enter details on the broker(s) who you have insurance policies with. You must enter details for one or more brokers before entering further insurance information. The minimum required information for a broker is Company Name and Email Address.  
**NOTE:** Changing broker details on this tab will **not** automatically update the details of broker(s) which you have already selected on subsequent tabs - After making changes here, you must copy the new information into any locations you require.

Broker Company Name  
FCA Reg No.  
Address  
Line 1  
Line 2  
Line 3  
Town/County/Postcode  
Town County Postcode  
Phone / Fax  
Phone No. Fax No.  
Email Address  
Email Address

**Insurance Broker Contacts**

1. The person responsible for verifying the Insurance details.  
First Name / Last Name  
First Name Last Name  
Phone

2. Alternative Contact  
First Name / Last Name  
First Name Last Name  
Phone

**Save** **Cancel**

Company Name	Email Address	Contact First Name	Contact Last Name
Enter data above			

terms & conditions

Grid where the broker details are saved; below example of saved data.

Company Name	Email Address	Contact First Name	Contact Last Name		
Henry Associates Ltd	Henry@hal.com	Henry	Broker	<b>Delete</b>	<b>Edit</b>
Barnaby Brokers Ltd	brian@barnaby.co.uk	Brian	Barnaby	<b>Delete</b>	<b>Edit</b>

Under each tab the subcontractor needs to select if they carry the insurance (Yes or No), and who the broker is, selecting a broker auto-fills the insurance broker details:

General Brokers Public Liability **Product Liability** Employers Liability Professional Indemnity Contract Works Validation Certificates

Do you have Product Liability?  Yes

Which broker handles this policy?  Select a Broker

If no brokers are visible, please go to the 'Brokers' tab and enter the details of your broker(s).

The Clear button is to remove and broker details selected in error

\*\* If a subcontractor edits the broker details under the broker tab, they will need to re-select the broker here for the changes to take effect \*\*

General Brokers **Public Liability** Product Liability Employers Liability Professional Indemnity Contract Works Validation Certificates

Do you have Public Liability?  Yes

Which broker handles this policy?  Select a Broker

If no brokers are visible, please go to the 'Brokers' tab and enter the details of your broker(s).

**Insurance Broker**

Broker Company Name	<b>Henry Associates Ltd</b>		
FCA Reg No.	<b>FCA123</b>		
Address	<b>The Heights</b>		
Town/County/Postcode	<b>Portland</b>	<b>Dorset</b>	<b>DT5 2EE</b>
Phone / Fax	<b>01305 831765</b>	<b>01305 780340</b>	
Email	<b>Henry@hal.com</b>		

**Insurance Broker Contacts**

1. The person responsible for verifying the Insurance details.

First Name / Last Name	<b>Henry</b>	<b>Broker</b>
Phone		

2. Alternative Contact

Once the broker is selected the details are auto-filled and the selection option reverts back to Select a Broker

Under the validation tab the subcontractor can easily see the status of his insurances.

Once he selects a broker to assign to an insurance type, their details are displayed and the validation is ready to be requested.

General Brokers Public Liability Product Liability Employers Liability Professional Indemnity Contract Works **Validation** Certificates

What do I do next?

- Once you have entered the necessary information on previous tabs, you may use the grid below to send validation requests to your broker(s).
- To request validation, tick the check boxes next to the items you want to request a validation for, then click 'Request'.
- When you request validation, an email will be sent to your insurance broker(s). When your broker(s) complete a validation you will be notified via email, and will be able to import the validation(s).

**NOTE:** If the grid below has no enabled items, you should double check that you have entered the required information on previous tabs.  
**NOTE:** If you have already requested validation of an item, but wish to change some of its details, you must unlock it before you can request that validation again.

Description	Mark for Validation	Time Since	Unlock	Import	Status
Professional Indemnity - Not Selected					
Contract Works - Not Selected					
Product Liability - Not Selected					
Public Liability Henry@hal.com Henry Associates Ltd	<input type="checkbox"/>	Last Request: N/A Last Validation: N/A Last Import: N/A	Unlock	Import	No Active Request
Employers Liability Henry@hal.com Henry Associates Ltd	<input type="checkbox"/>	Last Request: N/A Last Validation: N/A Last Import: N/A	Unlock	Import	No Active Request
	<b>Request</b>		<b>Unlock All</b>	<b>Import All</b>	

To request a validation the subcontractor ticks the box(es), and clicks on the request button.

The status changes from No Active Request to Pending and records when the request was made.

General Brokers Public Liability Product Liability Employers Liability Professional Indemnity Contract Works **Validation** Certificates

What do I do next?

- Once you have entered the necessary information on previous tabs, you may use the grid below to send validation requests to your broker(s).
- To request validation, tick the check boxes next to the items you want to request a validation for, then click 'Request'.
- When you request validation, an email will be sent to your insurance broker(s). When your broker(s) complete a validation you will be notified via email, and will be able to import the validation(s).

**NOTE:** If the grid below has no enabled items, you should double check that you have entered the required information on previous tabs.  
**NOTE:** If you have already requested validation of an item, but wish to change some of its details, you must unlock it before you can request that validation again.

Description	Mark for Validation	Time Since	Unlock	Import	Status
Professional Indemnity - Not Selected					
Contract Works - Not Selected					
Product Liability - Not Selected					
Public Liability Henry@hal.com Henry Associates Ltd	<input checked="" type="checkbox"/>	Last Request: 0 Minutes Last Validation: N/A Last Import: N/A	Unlock	Import	Pending
Employers Liability Henry@hal.com Henry Associates Ltd	<input checked="" type="checkbox"/>	Last Request: 0 Minutes Last Validation: N/A Last Import: N/A	Unlock	Import	Pending
	<b>Request</b>		<b>Unlock All</b>	<b>Import All</b>	

td terms & conditions

# BROKER

Validation Public Liability Product Liability Employers Liability Professional Indemnity Contract Works

**What should I (The Broker) do next?**

1. Use the grid below to determine which items require your attention. For each one, you will need to click the 'Import' button before completing the information on the relevant tab(s).
2. When ready, tick the boxes in the grid next to each item which you believe has complete and up to date information, then click the 'Validate' button.
3. If you believe you have made an error in the validated information, you may unlock an item and edit the data further, so long as there is still an outstanding request for that item.

Description	Time Since	Mark for Validation	Import	Unlock	Status
Contract Works - Not Requested					
Employers Liability	Last Request: 8 Minutes Last Import: N/A	<input checked="" type="checkbox"/>	<input type="button" value="Import"/>	<input type="button" value="Unlock"/>	
Product Liability - Not Requested					
Professional Indemnity - Not Requested					
Public Liability	Last Request: 8 Minutes Last Import: N/A	<input checked="" type="checkbox"/>	<input type="button" value="Import"/> <input type="button" value="Import All"/>	<input type="button" value="Unlock"/>	

**What information am I (the broker) missing?**

- The icons in this section indicate which questions you may still need to answer, if any.
- A red cross indicates that one or more questions in a section have not been answered or are invalid.
- Click on an icon to receive more details on what remains to be done.

Public Liability

Employers Liability

Copyright 2012 Builders Profile (UK) Ltd terms & conditions

To make it easier for the broker, there is a completion status; clicking on the red cross will list the fields that need completing

The broker selects the insurance by ticking the box, clicks on import and is then able to edit the insurance details.

When they click on the validate button, if no policy number is entered the following message will appear and they will not be able to validate.

**Public Liability - Policy number not found.  
Not all selected items are ready to be validated. No action taken.**

And if the expiry date is not updated or if it is left blank the following message will appear and they will not be able to validate

**Public Liability - Expiry date is in the past.  
Not all selected items are ready to be validated. No action taken.**

Once the broker has completed all the details and clicks on validate, the status changes to display a green tick:

**Validation** Public Liability Product Liability Employers Liability Professional Indemnity Contract Works

**What should I (The Broker) do next?**

- Use the grid below to determine which items require your attention. For each one, you will need to click the 'Import' button before completing the information on the relevant tab(s).
- When ready, tick the boxes in the grid next to each item which you believe has complete and up to date information, then click the 'Validate' button.
- If you believe you have made an error in the validated information, you may unlock an item and edit the data further, so long as there is still an outstanding request for that item.

Description	Time Since	Mark for Validation	Import	Unlock	Status
Contract Works - Not Requested					
Employers Liability	Last Request: 15 Minutes Last Import: 4 Minutes	<input type="checkbox"/>	<input type="button" value="Import"/>	<input type="button" value="Unlock"/>	✓
Product Liability - Not Requested					
Professional Indemnity - Not Requested					
Public Liability	Last Request: 15 Minutes Last Import: 4 Minutes	<input type="checkbox"/>	<input type="button" value="Import"/>	<input type="button" value="Unlock"/>	✓
		<input type="button" value="Validate"/>	<input type="button" value="Import All"/>		

[Click here to view all details you've been asked to validate in a printable form.](#)

The broker can also print out a copy of the validation if needed.

## Subcontractor – Importing Validation

Once the broker has validated, the automated email is still sent to the primary contact on the account informing them the broker has completed the validation.

In the Questionnaire the validation status will have changed from Pending to Ready for Import; and all that remains is for the subcontractor to click on the import button(s) or Import All...

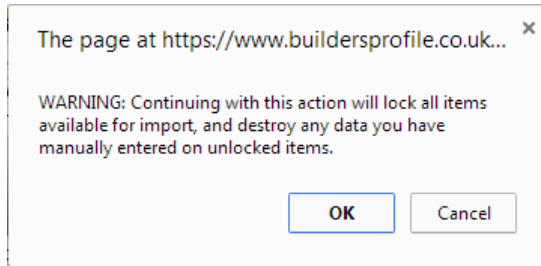
General Brokers Public Liability Product Liability Employers Liability Professional Indemnity Contract Works **Validation** Certificates

**What do I do next?**

- Once you have entered the necessary information on previous tabs, you may use the grid below to send validation requests to your broker(s).
- To request validation, tick the check boxes next to the items you want to request a validation for, then click 'Request'.
- When you request validation, an email will be sent to your insurance broker(s). When your broker(s) complete a validation you will be notified via email, and will be able to import the validation(s).

**NOTE:** If the grid below has no enabled items, you should double check that you have entered the required information on previous tabs.  
**NOTE:** If you have already requested validation of an item, but wish to change some of its details, you must unlock it before you can request that validation again.

Description	Mark for Validation	Time Since	Unlock	Import	Status
Professional Indemnity - Not Selected					
Contract Works - Not Selected					
Product Liability - Not Selected					
Public Liability Henry@hal.com Henry Associates Ltd	<input checked="" type="checkbox"/>	Last Request: 19 Minutes Last Validation: 4 Minutes Last Import: N/A	<input type="button" value="Unlock"/>	<input type="button" value="Import"/>	Ready For Import
Employers Liability Henry@hal.com Henry Associates Ltd	<input checked="" type="checkbox"/>	Last Request: 19 Minutes Last Validation: 4 Minutes Last Import: N/A	<input type="button" value="Unlock"/>	<input type="button" value="Import"/>	Ready For Import
		<input type="button" value="Request"/>	<input type="button" value="Unlock All"/>		<input type="button" value="Import All"/>



A warning window will be display, clicking ok will copy the information the broker has completed overwriting any existing data and locking the insurance section.

The status will now display a green tick.

Description	Mark for Validation	Time Since	Unlock	Import	Status
Professional Indemnity - Not Selected					
Contract Works - Not Selected					
Product Liability - Not Selected					
Public Liability Henry@hal.com Henry Associates Ltd	<input type="checkbox"/>	Last Request: N/A Last Validation: 11 Minutes Last Import: 0 Minutes	Unlock	Import	✓
Employers Liability Henry@hal.com Henry Associates Ltd	<input type="checkbox"/>	Last Request: N/A Last Validation: 11 Minutes Last Import: 0 Minutes	Unlock	Import	✓
	Request		Unlock All	Import All	

All that remains now is for the subcontractor to check the uploaded documents are current before submitting their profile.

# MAIN CONTRACTOR

Viewing the validation from the Main Contractor area:

General	Brokers	Public Liability	Product Liability	Employers Liability	Professional Indemnity	Contract Works	<b>Validation</b>	Certificates
---------	---------	------------------	-------------------	---------------------	------------------------	----------------	-------------------	--------------

---

**Public Liability** ✓  
Email: **Henry@hal.com**  
Last Action Date: **2014 Apr 09 09:18:15 (UTC)**

---

**Product Liability** ✗  
Email: **[Not Yet Validated]**  
Last Action Date: **[Not Yet Validated]**

---

**Employers Liability** ✓  
Email: **Henry@hal.com**  
Last Action Date: **2014 Apr 09 09:18:15 (UTC)**

---

**Professional Indemnity** ✗  
Email: **[Not Yet Validated]**  
Last Action Date: **[Not Yet Validated]**

---

**Contract Works** ✗  
Email: **[Not Yet Validated]**  
Last Action Date: **[Not Yet Validated]**

---

terms & condition