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:

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:

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

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:

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 **

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.

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.

BROKER

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:

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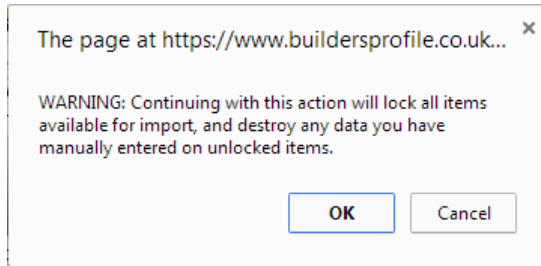
A warning window will be display, clicking ok will copy the information the broker has completed overwriting any existing data and locking the insurance section.

The status will now display a green tick.

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: