PPL Carrier Configuration

Introduction

The purpose of this document is to provide information and guidance to Carrier firms on their configuration options (organisational set-up).

The topic areas explored in this document are as follows:

- **PPL Set-up**
  - Four-level hierarchy
  - Roles
  - Default teams
  - Consortium stamps
  - Line conditions
- **Non-configuration-related roles**
- **Frequently Asked Questions**

PPL set-up / hierarchy

The following section details how each level of the four-level hierarchy is structured in PPL, and the options it gives your organisation.

Organisation

This is the parent company e.g., Chubb or Beazley.

- Whilst it is used for the Configuration set-up and for MI Reporting from this level, it only displays in Billing and for reporting and does not have functional impact and is not displayed anywhere on the platform or any documentation issued e.g., security pages, endorsements.
- Line conditions are set up at this level
- You cannot reassign placements at this level

Company

This is the legal entity e.g., Chubb Europe or Chubb UK and is linked to the stamps that you would like available. You can report at this level.

- You cannot reassign work (e.g., placement, firm order, endorsements) at this level
- Stamps are linked to this level (linked to users)
- Company name will be displayed with the stamp display name on the security pages/documentation
- You cannot see work from a different company under the same organisation, unless you belong to a team in both companies
- When a Broker selects one of your Underwriters, they will select them at Company level
- A user can exist in more than one Company with the same email address
- Logos are set at this level (also at stamp level). If you plan to have multiple companies, please supply us with a logo for each company.

Branch

This enables you to group your teams e.g., for Chubb Europe this may be Chubb UK, Chubb Frankfurt, and Chubb Paris.

- You can reassign work at this level
- Branch does not show on the signing pages/documentation

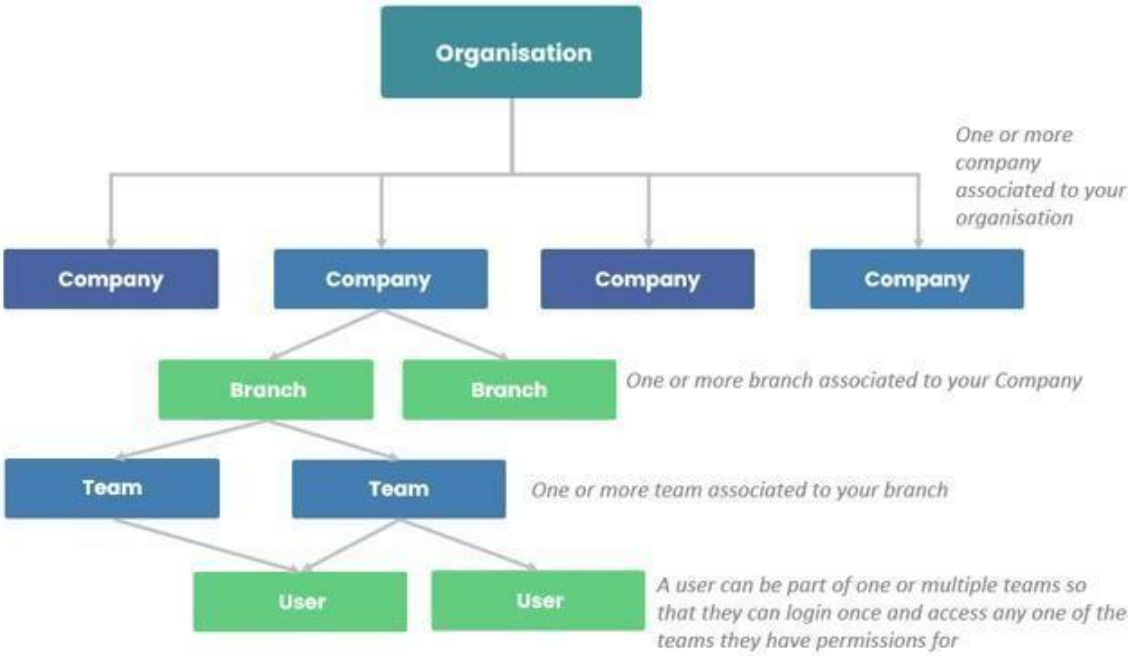
Team

This enables you to split out your teams and would normally be by class of business e.g., Marine or Casualty.

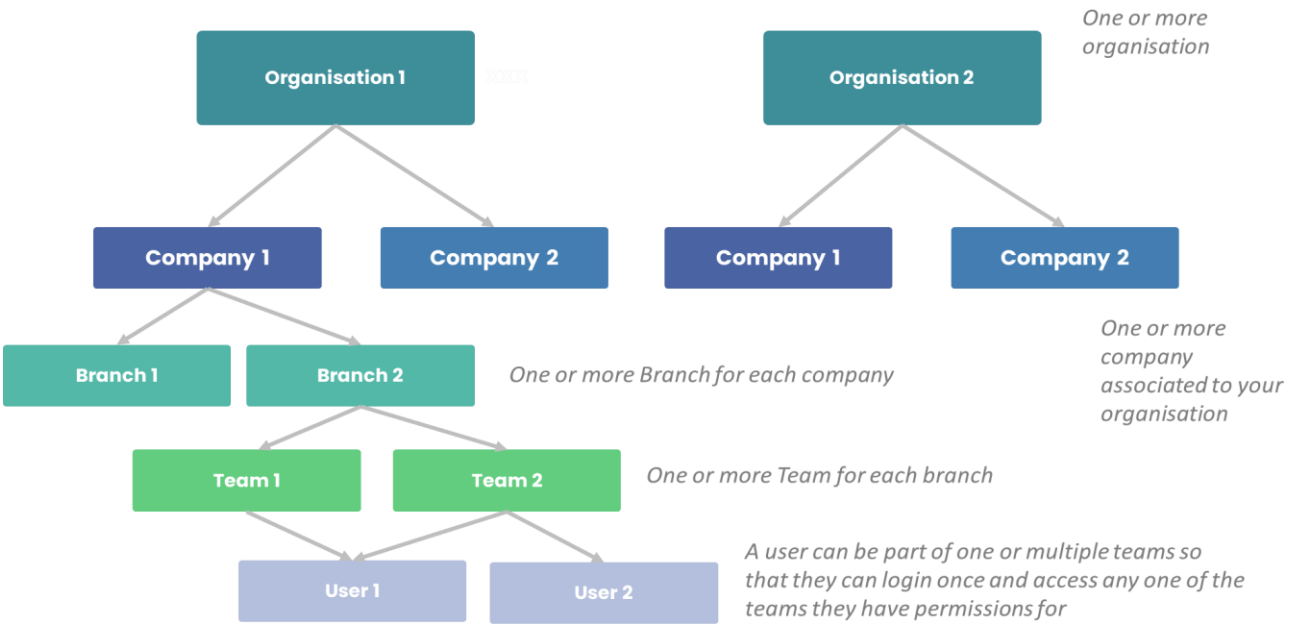
- You can reassign work at this level
- You use your Team 'drop down' to toggle between different Companies you belong to at Team level
- The team's name does not show on signing pages/documentation
- Users are linked to this level

We believe the new four-level hierarchy provides the opportunity for market firms to either merge or separate their top-level organisations, as displayed in options A & B below.

Option A – Single organisation

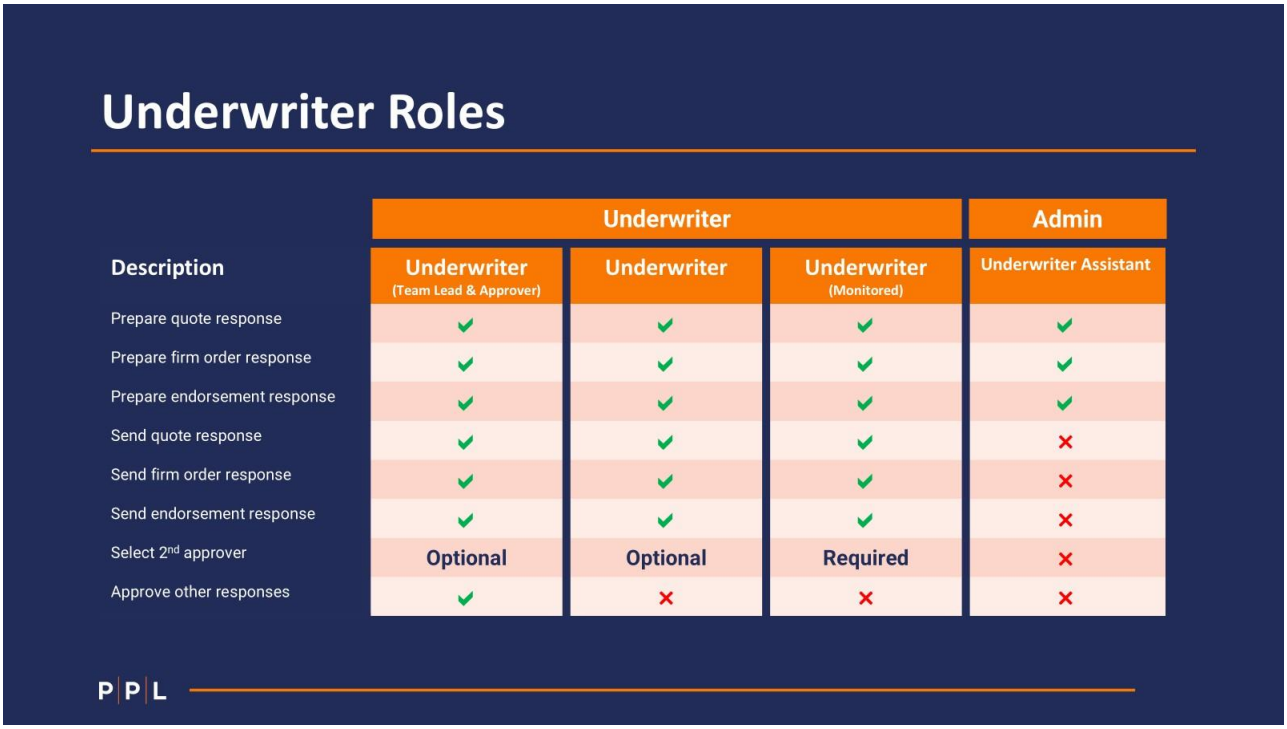


Option B - Multiple organisations



Roles

The roles are detailed in the following table.



Underwriter Roles

Description	Underwriter			Admin
	Underwriter (Team Lead & Approver)	Underwriter	Underwriter (Monitored)	Underwriter Assistant
Prepare quote response	✓	✓	✓	✓
Prepare firm order response	✓	✓	✓	✓
Prepare endorsement response	✓	✓	✓	✓
Send quote response	✓	✓	✓	✗
Send firm order response	✓	✓	✓	✗
Send endorsement response	✓	✓	✓	✗
Select 2nd approver	Optional	Optional	Required	✗
Approve other responses	✓	✗	✗	✗

PPL

Default teams

Where a user belongs to more than one team (per company), they will need to choose where all their work (e.g., placements, firm orders, and endorsements) is sent. This is achieved by populating the 'Is Default' field in the Carrier Hierarchy file. However, a user can reassign to the other teams they are a member of.

NB. We have selected the first team in the Carrier Hierarchy file as the user's default team; please change as required.

Stamps

In the PPL the Stamp Display Name field contains the whole display name for all stamps.

The consortium, coverholder and LIC 9000 series consortium stamps must be registered with Velonetic for the current year of account prior to being set up on the platform.

NB. Stamps have a 256-character limit. For the consortium stamps over the character limit, the breakdown will be detailed at https://tiny.one/PPL9000

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Line conditions

Global line conditions

These will be added as standard across all organisations within the platform and therefore do not need to be added to your configuration. They are as follows –

- Line to stand.
- Each declaration to be referenced separately.

Other roles (non-config)

To address our communications to the correct people, we store the below user contacts outside of your organisation configuration.

PPL Point of Contact: The day-to-day conduit to the PPL Team for onboarding, configuration, training, and other general inquiries.

Stamp Approver & User Approver: Will authorise the setup of new users, if required, authorise changes to your company details or approve the configuration of new stamps - we encourage the nomination of two approvers.

Finance Manager: We direct all our invoicing queries and send our invoices to the Finance Manager.

Business as usual (BAU): The contact for BAU and Service Management queries.

Data Protection Officer (DPO): The DPO contact will be the contact for GDPR queries.

Contract Notices Contact: Notices to the MUA will be sent to this contact. This includes the annual pricing notice.

CEO (Chief Executive Officer): It is the highest-ranking executive position.

CFO (Chief Financial Officer): They are the highest-ranking executive responsible for managing the financial actions of a company.

COO (Chief Operations Officer): is a high-ranking executive who oversees a company's day-to-day administrative and operational functions.

Head of Change: is a senior executive responsible for overseeing an organisation's strategic transformation and large-scale projects

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Frequently asked questions

Q: How do I request any amendments after the Organisation has been onboarded?
A: Please contact the support team via email support@pplnextgen.com or phone +44 808 178 8081

Q: When can I get in touch with the service desk?
A: The business service desk is open 8am-6pm GMT Monday to Friday (excluding bank holidays).

Q: Where can I get new user/team/stamp forms?
A: You can download the forms from our website under the client support section. Alternatively, you can request the necessary form from support@pplnextgen.com

Q: Why do you need to know if we're a member of a trade organisation?
A: This is for billing purposes and bears no impact on functionality or display within the platform.

Q: What is a Technical User?
A: This is new to PPL. A technical user will not log into the platform, instead will use APIs to conduct business.

Q: What does a Point of Contact role allow a user to do on the platform?
A: These contacts are not used or displayed anywhere on the platform by users. This is solely for the PPL Support Team to have quick access to the main contacts at each firm e.g., User/Stamp approvers.

Q: How can I get my configuration extract?
A: Please contact the support team support@pplnextgen.com

Q: How do I arrange training?
A: You can find the training materials on LMS, which is accessible through the menu on the platform. Alternatively, you can contact training@ppl-london.com