ereinsure®

Quick Start Guide

Getting Help and Support

***Note:** Contact your own help desk or administrator first. If you don't know who to contact or your help desk does not cover eReinsure, contact eReinsure Support.*

USA

Monday through Friday from 8 A.M. to 8 P.M. U.S. Eastern time by calling toll-free **866-Goto-eRe** (866-468-6373)

UK and Europe

Monday through Friday from 9 A.M. to 5 P.M. UK Local time by calling **+44(0)20.7327.4555**

Email

support@ereinsure.com

User Guides

- Click the Site Help icon at upper right of My Desk.
- Click the Insurer User Guide link.
- Click the Adobe PDF link to download.

Accessing the Platform

- Open Internet Explorer and go to http://www.ereinsure.com
- Click the login button in the upper-right corner of the page.

- Enter username and password and click the Login button.

Forgotten Password

- If you happen to forget your eReinsure password, you can reset it yourself using the "Forgot your password" link on the login page.
- After you provide your user name, eReinsure will send a secure link to your registered email address with instructions for resetting your password.

Changing Your Password

- Click the Settings icon at upper right of My Desk.
- Click the Edit button under Personal Information.
- Click the Change Password button.

***Note:** Passwords may require upper and lower case letters as well as numbers depending on your company's settings.*

Changing Personal Distribution List

- Click the Settings icon at upper right of My Desk.
- Click the Edit button under Personal Distribution List.
- Check the boxes next to the underwriters and brokers you will use.
- Click the Save Changes button.

Add Recipients to email Notifications

- Click on the Settings icon at the upper right of My Desk.
- Click on the Edit button under Personal Information.
- In the Other Email Addresses field, append additional email addresses using a semi-colon (;) and then the next email address.

Printing Pages

- Select Print... from the browser's File menu.
- Click the Print button to print the page.

***Note:** If the right side of the printed screen is cut off, change the orientation of the paper to Landscape under Page Setup... in the browser's File menu.*

Creating a Submission

- Click the Create Submission link in the menu bar.
- Classify the Submission

  Enter the original policy information. Select the policy class and type. Select the template you will use to describe the policy in step 2. Select reinsurance type and perils. Select default currency.
- Describe the Original Policy

  Populate the structured data fields, attach electronic files, enter information about terms and conditions, endorsements, exclusions and any general comments.
- Specify the reinsurance requested

  Specify the structure of the proposed reinsurance contract and provide information about the reinsurance terms, conditions and exclusions. Request additional quotes. Attach electronic files.
- Select markets and submit

  Select which markets to which you will send the submission. Review the submission and submit.

Attaching Files

- Click the Attach File button.
- Click the Browse... button.
- Locate the file on your computer or Network and highlight it.
- Click the Open button.
- Enter a description of the file in the Description of file field.
- Click the Attach File button.

Counter-offering a Quote

- Click the Named Insured link for the quote you want to review under Quotes to Review on My Desk.
- Scroll to the bottom and click the Counter
- Offer button.
- Change the Reinsurance Request and any terms and conditions as needed.
- Click the Send Offer button.

Saving Files

- Right-click on the document's hyperlink.
- Select Save Target As...
- Choose a location to which you will save the file and click the Save button.
- Navigate to where you saved the file.
- Double-click the file name.

***Note:** The appropriate program should open the document.*

Updating a Submission

- Click the Named Insured link for the submission you want to update.
- Click the Update Submission link in the left column
- Modify policy and reinsurance dates as needed.
- Enter any comments.
- Attach files.
- Click the Continue button.
- Select the markets to receive the update.
- Click the Submit button.

Binding a Quote

- Click the Named Insured link for the quote you want to bind under Quotes to Review on My Desk.
- Scroll down to Quote Detail - Requested and Alternates and check the box(es) next to the quotes you wish to bind.
- Scroll to the bottom and click the Request to Bind button.
- Select the Writing Company from the drop-down list.
- Enter a Policy Number(s).
- Click the Request to Bind button.
- Confirm the request by clicking the pop-up window OK button.

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Copying a Submission

Note: *For renewals, make a copy of the submission found in Placed Submissions under My Filing Cabinet.*

- Click the Named Insured link of the submission you wish to copy.
- Click the Copy link.
- Click the Edit link to modify the submission and submit.

Submitting to Additional Markets

- Click the Named Insured link of the submission you wish to send to additional markets.
- Click the Submit to Additional Markets link in the left column.
- Select the additional markets by checking the appropriate check boxes.
- Enter any comments to the new markets.
- Click the Submit button.
- Click the OK button to confirm.

Archiving a Submission

CAUTION: *Do not move a submission to the filing cabinet unless all the lines you want bound are in a bound status*

- Click the Named Insured link for the submission under My Submissions.
- Click the Move to Filing Cabinet link.

Note: *If there are outstanding negotiations, the Outstanding Negotiations screen is displayed and the process continues below.*

- For outstanding quotes, check the radio button to decline the quote or retract the submission.
- For submissions that have not been quoted, check the box to retract them.
- Click the Submit button.

Finding Others' Submissions

- Click the My Views link in the menu bar.
- Either enter a search term in the Search box and click the Search button or select one or more filter criteria from the drop down lists of filters and/or enter a Reinsurance Effective Date or range of dates in the Filter box and click the Filter button.
- Select the number of results to be displayed per page from the drop down box at the top center of the search results table.
- To view the next set of results, click the **Next >>** link at the top right of the search results table. Conversely, to go back a page, click the **<< Back** link in the same corner.
- To sort the results in the column, click on the title of the column. Click the title of the column again to sort the results in reverse.
- Click on the Named Insured link of the submission you wish to view and work with.

Notes:

Reassigning Submissions

Note: *Not all users have Reassign permission. If you do not have the Reassign button, then you do not have the permission. Users with My Views and Reassign permissions can reassign up to 200 submissions at once.*

- Click the Named Insured link of the submission you wish to reassign.
- Click the Reassign link in the left column.
- Select the office of the underwriter receiving the submission from the Office drop-down list.
  Select the underwriter from the Underwriters drop-down list.
- Enter comments to the new underwriter.
- Click the Submit button.
- Click OK to confirm reassignment.