

Dated: Sep 29 2022

Email: askBeazley@Beazley.com for any support related questions



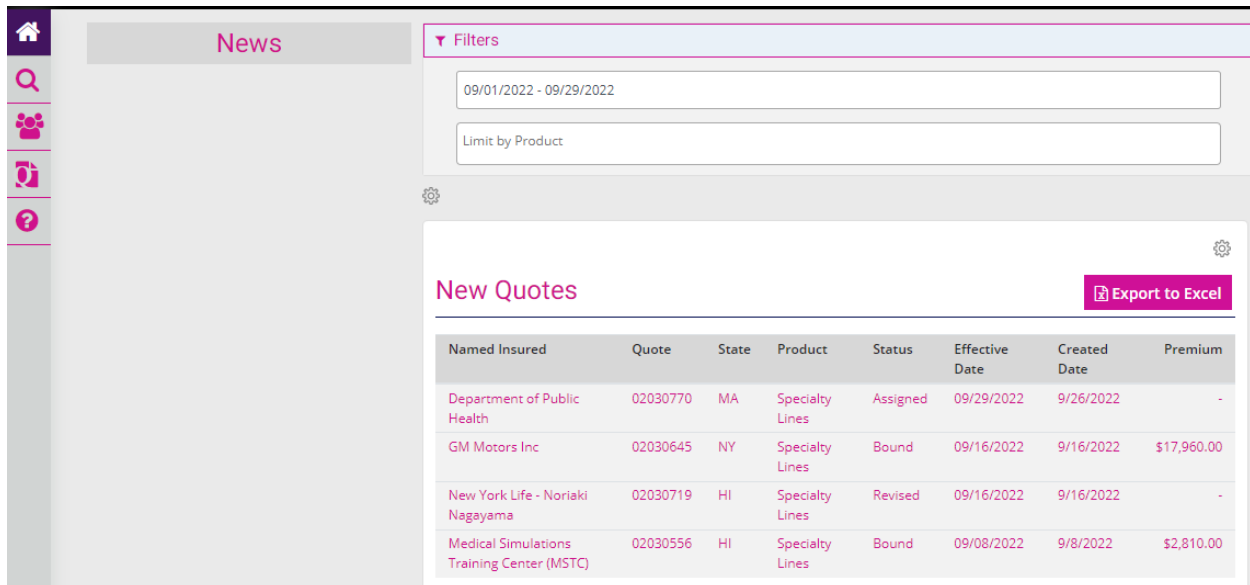
Table of Contents

Section Number	Description	Page Number
1	Dashboard	<u>3</u>
2	Search Tab	<u>4</u>
3	Customer Tab	<u>4</u>
4	Quote Tab	<u>5</u>
5	Common Tab	<u>6</u>
6	Clearance	<u>7</u>
7	Information Security & Privacy Qs	<u>9</u>
8	Quote Options & Bind Request	<u>10</u>
9	Letter Tab	<u>11</u>
10	Save, Bind and Refer Tab	<u>12</u>
11	Quote Save	<u>12</u>
12	Request to Bind Button	<u>13</u>
13	Underwriting Referral	<u>14</u>
14	Request Help	<u>14</u>
15	Documents Tab	<u>15</u>
16	Help Tab	<u>16</u>



- 1. Dashboard:** This is a snapshot of the quotes already generated by the user. If the user has shared access permissions, then they will also be able to see their colleagues' quotes.

Notices from Beazley to users will appear in the News section. Please look out for these as we often provide you with underwriting and technical updates you should be aware of.



News

Filters

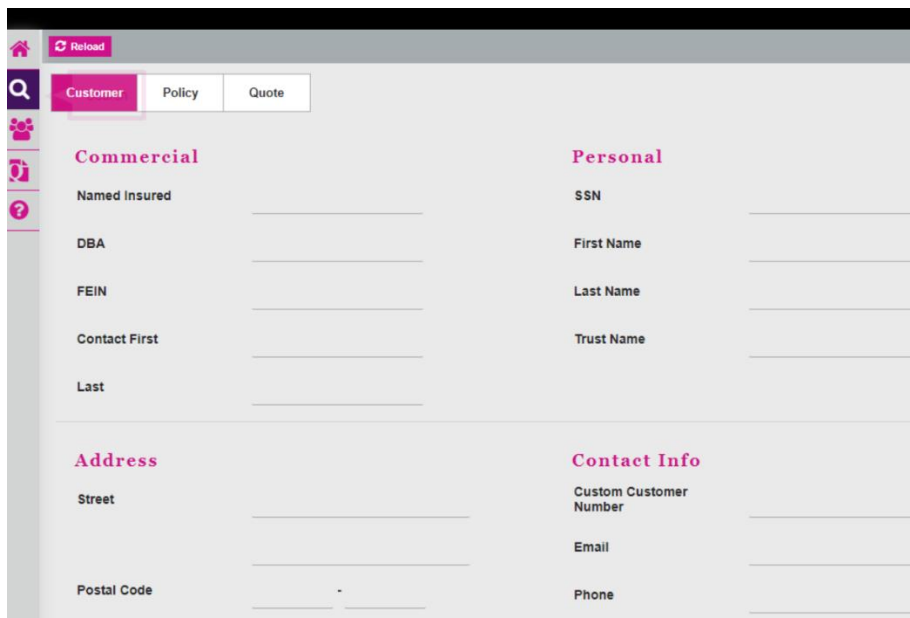
09/01/2022 - 09/29/2022

Limit by Product

New Quotes [Export to Excel](#)

Named Insured	Quote	State	Product	Status	Effective Date	Created Date	Premium
Department of Public Health	02030770	MA	Specialty Lines	Assigned	09/29/2022	9/26/2022	-
GM Motors Inc	02030645	NY	Specialty Lines	Bound	09/16/2022	9/16/2022	\$17,960.00
New York Life - Noriaki Nagayama	02030719	HI	Specialty Lines	Revised	09/16/2022	9/16/2022	-
Medical Simulations Training Center (MSTC)	02030556	HI	Specialty Lines	Bound	09/08/2022	9/8/2022	\$2,810.00

- 2. Search Tab:** This is a tab to search for quotes. Insureds can be searched by 'Name Insured', 'Policy Number' or 'Quote Number' depending on which tab is selected.



Search Tab

Customer **Policy** **Quote**

Commercial

Named Insured

DBA

FEIN

Contact First

Last

Personal

SSN

First Name

Last Name

Trust Name

Address

Street

Postal Code

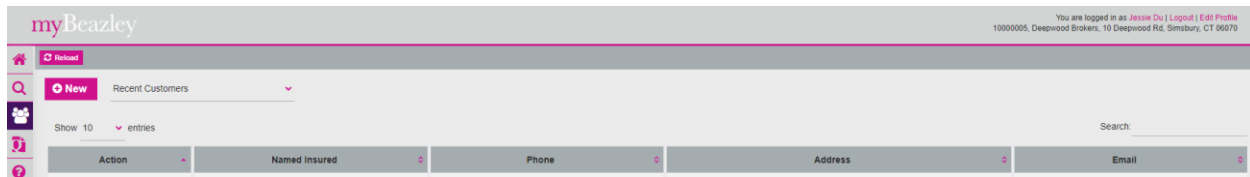
Contact Info

Custom Customer Number

Email

Phone

3. **Customer Tab:** User can also use this tab for a client; however, the **Search Tab** is more effective for customer look up.



User can click on “New” to add a client.

4. **Quote Tab:** This is a summary page of previously submitted quotes.

Number	Line Of Business	Status	Named Insured	Clearance Status	Effective Periods	Premium	U/W	State
02030770	Specialty Lines	Assigned	Department of Public Health	Submitted	09/29/2022 - 09/29/2023	-	Beazley	MA
02030719	Specialty Lines	Revised	New York Life - Noriaki Nagayama	Reserved	09/16/2022 - 09/16/2023	-	Beazley	HI
02030645	Specialty Lines	Bound	GIM Motors Inc	Reserved	09/16/2022 - 09/16/2023	\$17,960.00	Beazley	NY
02030556	Specialty Lines	Bound	Medical Simulations Training Center (MSTC)	Reserved	09/08/2022 - 09/08/2023	\$2,810.00	Beazley	HI
02030409	Specialty Lines	Revised	Delaware City	Reserved	10/01/2022 - 10/01/2023	-	Beazley	DE
02030401	Specialty Lines	Revised	New York-New York Hotel & Casino	Reserved	10/01/2022 - 10/01/2023	-	Beazley	NV
02030395	Specialty Lines	Revised	Acuario de Georgia	Reserved	10/01/2022 - 10/01/2023	-	Beazley	GA
02030388	Specialty Lines	Revised	Instituto de Tecnologia de Georgia	Reserved	10/01/2022 - 10/01/2023	-	Beazley	GA
02030379	Specialty Lines	Revised	Acuario de Georgia	Reserved	10/01/2022 - 10/01/2023	-	Beazley	GA
02030378	Specialty Lines	Revised	New York Stock Exchange	Reserved	10/01/2022 - 10/01/2023	-	Beazley	NY

Click on “New Quote” to start generating a new quote.

You will be brought to the below screen. The Quote tab splits out into five main areas, which can be seen from the screen shot below.



5. **Common Tab:** This tab takes the user into the Insured's information.

Enter Insured information including name and address. There is an auto-populate address function; however, if this does not work for your risk, please enter the address manually.

Enter a website address for the Insured. This step is mandatory. If the insured does not have a website, you will need to submit a manual submission to **PE_Submissions@Beazley.com**.



Enter following fields under 'Risk Information':

Effective Dates-If 'Effective Date Unknown' is selected an **indication** will be generated.

Program-Select program if this has been agreed between your brokerage and Beazley from the drop-down list. If your brokerage is not part of a program, please leave blank.

Industry Class-Select appropriate industry class.

6. Proceed to the **Clearance** section and enter the Insured's revenues for the last 12 months. If your client doesn't have revenues due to being in R&D or is a non-profit organization, you can enter an operating budget.

Click the 'Submit for Clearance' button and you will see a pop up notifying you that you have submitted successfully, and the clearance status will change to 'Submitted'. See below screenshot.

This screenshot shows a confirmation message at the top: "Request to clearance submitted successfully" with a thumbs-up icon. Below this, the "Risk Information" section is visible, containing fields for Effective Date (03/16/2021), Expiration Date (03/16/2022), Program (dropdown), Industry Class (Restaurant), Risk Manager Name (Joe Bloggs), Risk Manager Email, and Risk Manager Phone. The "Click Below to Submit for Clearance" section shows "Total revenue for the last 12 months?" as \$1,500,000.00 and "Reserved Status" as Submitted. A "Submit for Clearance" button is present.

This screenshot shows the "Risk Information" section of the portal. It includes fields for Zip (55337), Website, Effective Date (03/16/2021), Expiration Date (03/16/2022), Program (dropdown), Industry Class (Restaurant), Risk Manager Name (Joe Bloggs), Risk Manager Email, and Risk Manager Phone. The "Click Below to Submit for Clearance" section shows "Total revenue for the last 12 months?" as \$1,500,000.00 and "Reserved Status" as Submitted. A "Submit for Clearance" button is present.

After this, click on 'Continue' at the bottom of the screen and you should receive a clearance result. If you receive a 'Reserved' result, then you can progress to quote.

If your result is 'Pending Review' for longer than a few minutes, then it is likely that the risk has been sent for manual review. In this case, please allow time for our team to manually clear the risk and check back in 1 hour (during business hours 8am-7:30pm EST) or the following day if submitted after 7:30pm EST. You will receive an email confirmation when the risk has been reserved or an email declination for those that have been sent to manual review.

If your result is "**Blocked**" then we have already received this risk for clearance, and you will not be able to continue with this risk to quote.

If the result is "**Declined**", upon review this risk is outside of appetite. Please speak to your underwriter or send a broker support request to askBeazley@Beazley.com if there are any concerns.

Once the clearance status changes to "**Reserved**", you will be taken to the Class of Business tab, and a pop up will appear at the top of the screen to notify you of the "**Reserved**" result. Click on the "X" to acknowledge and close out the pop up.

You will not be able to move forward with the risk until the clearance result has updated from submitted to "**Reserved**".

Then proceed to answer the **Information Security & Privacy Controls** questions and click on continue at the bottom of the screen.



7. Information Security & Privacy Questions

Reload

Clearance Status is updated to Reserved

BEAZLEY BREACH RESPONSE (BBR)

Class Of Business

Quote Options

LETTER

SAVE, BIND, AND REFER

DOCUMENTS

Information Security & Privacy Controls

- Does the company use firewall & anti-virus software to protect their computers?

Yes	No
-----	----
- If the company accepts credit cards as a form of payment, are they or their credit card processor (e.g. PayPal, Square, etc.) PCI compliant?

Yes	No	N/A
-----	----	-----
- Before processing a wire transfer, does the company confirm the request by a secondary means of communication?

Yes	No	N/A
-----	----	-----
- Does the company or any other proposed insured (including any director, officer or employee) have knowledge of or any information regarding any fact, circumstance, situation, event, or transaction which may give rise to a claim, loss or obligation to provide breach notification under the proposed insurance?

Yes	No
-----	----
- During the past five years has the company:
 - Received any claims or complaints with respect to privacy, breach of information or network security, or unauthorized disclosure of information?

Yes	No
-----	----
 - Been subject to any government action, investigation or subpoena regarding any alleged violation of a privacy law or regulation?

Yes	No
-----	----
 - Notified customers or any other third party of a data breach incident involving the Applicant?

Yes	No
-----	----

Reload

Legal Information
Privacy and Cookies Statement

COMMON

BEAZLEY BREACH RESPONSE (BBR)

Class Of Business

Quote Options

LETTER

SAVE, BIND, AND REFER

DOCUMENTS

Information Security & Privacy Controls

- Does the company use firewall & anti-virus software to protect their computers?

Yes	No
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- If the company accepts credit cards as a form of payment, are they or their credit card processor (e.g. PayPal, Square, etc.) PCI compliant?

Yes	No	N/A
-----	----	-----
- Before processing a wire transfer, does the company confirm the request by a secondary means of communication?

Yes	No	N/A
-----	----	-----
- Does the company or any other proposed insured (including any director, officer or employee) have knowledge of or any information regarding any fact, circumstance, situation, event, or transaction which may give rise to a claim, loss or obligation to provide breach notification under the proposed insurance?

Yes	No
-----	----
- During the past five years has the company:
 - Received any claims or complaints with respect to privacy, breach of information or network security, or unauthorized disclosure of information?

Yes	No
-----	----
 - Been subject to any government action, investigation or subpoena regarding any alleged violation of a privacy law or regulation?

Yes	No
-----	----
 - Notified customers or any other third party of a data breach incident involving the Applicant?

Yes	No
-----	----

You will then be taken to the 'Quote Options' Tab: here you will find instructions on how to select your quote options and bind the risk. Please read these steps to support your overall portal experience.

8. Quote Options and Bind request

> How do I quote my risk?

- Left click the premium option(s) based upon the retentions and limits you would like to present.
- The resulting pink highlighted options will be presented on the quote letter.
- To deselect an option, left click on the premium highlighted in pink.
- To change the number of notified individuals, click in the field to select a new value.
 - Notified individual options include 25,000, 50,000, 100,000, 250,000, and 500,000. To request a value not listed, navigate to the Save, Bind, and Refer tab to request an Underwriting Referral.
 - Changing the number of notified individuals may result in a change in premium.

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- To change the number of notified individuals, click in the field to select a new value.
 - Notified individual options include 25,000, 50,000, 100,000, 250,000, and 500,000. To request a value not listed, navigate to the **Save, Bind, and Refer** tab to request an Underwriting Referral.
 - Changing the number of notified individuals may result in a change in premium.

- Right click on the premium for the retentions and limits you wish to bind.
- Once it turns turquoise, this indicates the option you have marked to bind.
- Ensure that a completed, currently signed and dated copy of the submitted Beazley application has been uploaded to the Documents tab with the category set to 'Application - Signed.'
- Navigate to the Save, Bind, and Refer tab and select the 'Request to Bind' button and follow the prompts to submit a bind request.

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- Ensure that a completed, currently signed and dated copy of the submitted Beazley application has been uploaded to the Documents tab with the category set to 'Application - Signed.'
- Navigate to the Save, Bind, and Refer tab and select the 'Request to Bind' button and follow the prompts to submit a bind request.

COMMON

BEAZLEY BREACH RESPONSE (BBR)

Class Of Business

Quote Options

LETTER

SAVE, BIND, AND REFER

DOCUMENTS

> How do I quote my risk?

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- To change the number of notified individuals, click in the field to select a new value.
 - Notified individual options include 25,000, 50,000, 100,000, 250,000, and 500,000. To request a value not listed, navigate to the Save, Bind, and Refer tab to request an Underwriting Referral.
 - Changing the number of notified individuals may result in a change in premium.

> How do I bind my risk?

- Right click on the premium for the retentions and limits you wish to bind.
- Once it turns turquoise, this indicates the option you have marked to bind.
- Ensure that a completed, currently signed and dated copy of the submitted Beazley application has been uploaded to the Documents tab with the category set to 'Application - Signed.'
- Navigate to the Save, Bind, and Refer tab and select the 'Request to Bind' button and follow the prompts to submit a bind request.

Industry	Auto Dealership		
Revenue	\$23,333,334.00		
	LIMIT 1	LIMIT 2	
X			
→ LIMITS			
Policy Aggregate Limit of Liability	\$1,000,000	\$2,000,000	
Notified Individuals	100,000	100,000	
→ RETENTIONS & PREMIUMS			
Deductibles	Premiums		
Each Claim Retention	Breach Response Services Retention	Legal Services Retention	Cyber Extortion Retention
\$1,000	\$1,000	\$500	n/a
	\$1,430.00	\$1,650.00	

From here, to view your quote letter, make your premium selection so that the premium turns pink, and then click on 'Continue' at the bottom of the page. This will take you to the 'Letter' Tab and you can review your quote letter and send it to someone and/or yourself.

Note: You will not be able to view the Letter Tab if you make your premium selection is [turquoise](#). The portal will assume you are ready to bind and will request you to move to the Bind Request Button.

COMMON
BEAZLEY BREACH RESPONSE (BBR)
Class Of Business
Quote Options
LETTER
SAVE, BIND, AND REFER
DOCUMENTS

How do I quote my risk?
How do I bind my risk?

Industry: Auto Dealership
Revenue: \$23,333,334.00

	LIMIT 1	LIMIT 2
Policy Aggregate Limit of Liability	\$1,000,000	\$2,000,000
Notified Individuals	100,000	100,000

RETENTIONS & PREMIUMS

Each Claim Retention	Breach Response Services Retention	Legal Services Retention	Cyber Extortion Retention	Premiums
\$1,000	\$1,000	\$500	n/a	\$1,430.00
\$2,500	\$2,500	\$1,250	n/a	\$1,290.00

9. **Letter Tab:** This will take you to the Letter Tab. When you click on the Letter tab your quote will automatically save. From here you can send the quote letter and prefilled application to any recipient. Please read through the quote letter, download, and save it to your own drive. Please also download the prefilled application that was created whilst you were completing the risk information.

COMMON
BEAZLEY BREACH RESPONSE (BBR)
LETTER
SAVE, BIND, AND REFER
DOCUMENTS

Send Letter
Download Letter
Download Application

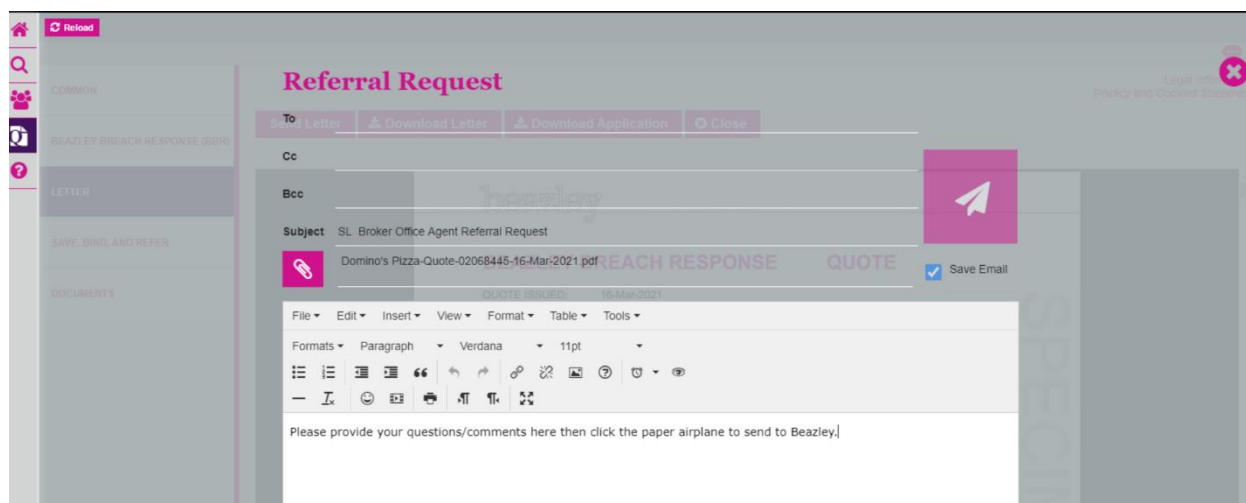
beazley

BEAZLEY BREACH RESPONSE QUOTE

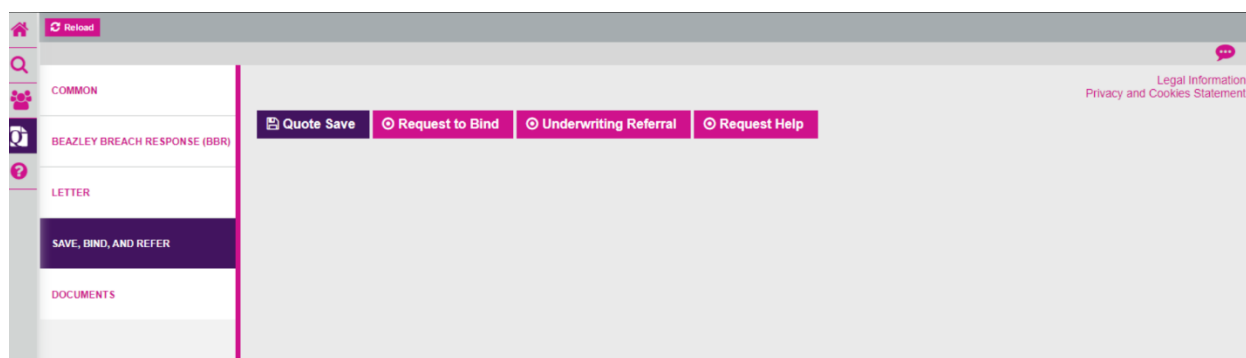
QUOTE ISSUED: 25-Mar-2021
BBRMM E Trade Agency One
Agent1 ETrade
6540 Centers Dr
Holland, OH 43528-9477
RE: Decision Research Corporation
INSURANCE QUOTE: BEAZLEY BREACH RESPONSE

If you click on the “**Send Letter**” button, an email template will open.

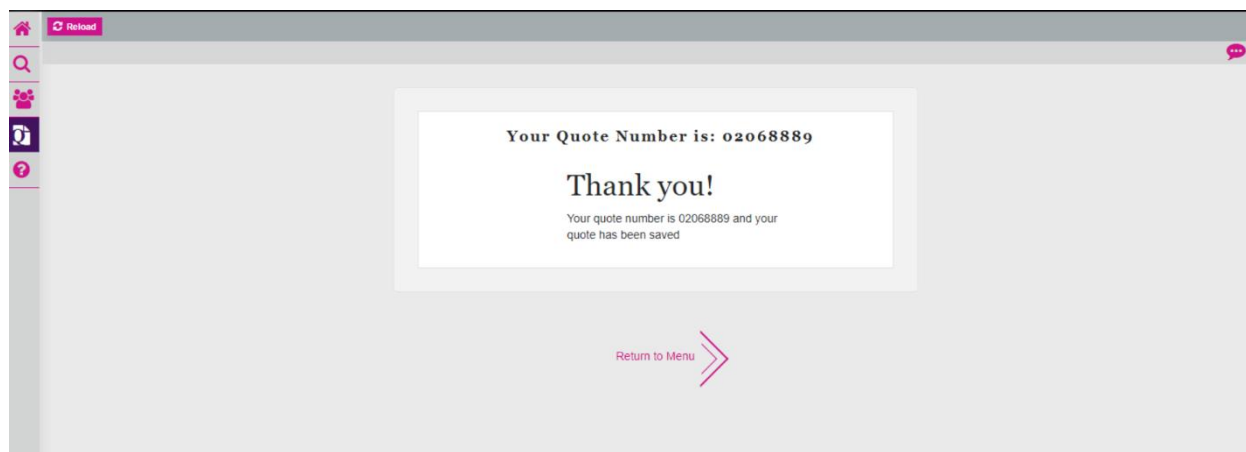
Include your own email address in the Cc field if you also want to receive a copy and remember to click on the paperclip if you want to attach the application. To send the email click on the large paper airplane button to the right of the email.



10. Save, Bind, and Refer Tab: Here you can save the quote and come back to it. Request to bind (if you have already made your selection on the quote options tab).



11. If you click on **Quote Save**, then the quote will save and you will see the below screen.

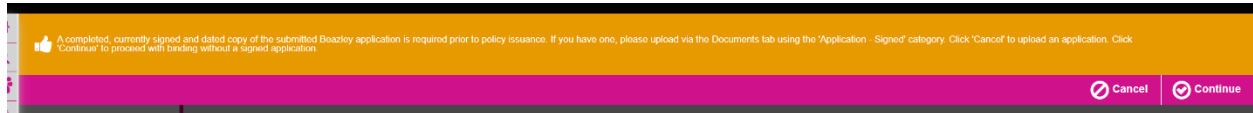


If you click on **Return to Menu**, you will be taken back to a view of your dashboard, which will include the newly generated quote.

MYBEAZLEY US BROKER PORTAL USER GUIDE

Number	Line Of Business	Status	Named Insured	Clearance Status	Effective Periods	Premium	UW	State
02030770	Specialty Lines	Assigned	Department of Public Health	Submitted	09/29/2022 - 09/29/2023	-	Beazley	MA
02030719	Specialty Lines	Revised	New York Life - Noriaki Nagayama	Reserved	09/16/2022 - 09/16/2023	-	Beazley	HI
02030645	Specialty Lines	Bound	GMI Motors Inc	Reserved	09/16/2022 - 09/16/2023	\$17,960.00	Beazley	NY
02030556	Specialty Lines	Bound	Medical Simulations Training Center (MSTC)	Reserved	09/08/2022 - 09/08/2023	\$2,810.00	Beazley	HI
02030409	Specialty Lines	Revised	Delaware City	Reserved	10/01/2022 - 10/01/2023	-	Beazley	DE
02030401	Specialty Lines	Revised	New York-New York Hotel & Casino	Reserved	10/01/2022 - 10/01/2023	-	Beazley	NV
02030395	Specialty Lines	Revised	Acuario de Georgia	Reserved	10/01/2022 - 10/01/2023	-	Beazley	GA
02030388	Specialty Lines	Revised	Instituto de Tecnologia de Georgia	Reserved	10/01/2022 - 10/01/2023	-	Beazley	GA
02030379	Specialty Lines	Revised	Acuario de Georgia	Reserved	10/01/2022 - 10/01/2023	-	Beazley	GA
02030378	Specialty Lines	Revised	New York Stock Exchange	Reserved	10/01/2022 - 10/01/2023	-	Beazley	NY

12. Request to Bind Button: Once you are in your quote and have chosen your quote options, from the 'Save, Bind and Refer' Tab, you can click on the 'Bind' button, and you will see the below screen:



A completed and signed application is required prior to policy issuance. This can be uploaded under the **Documents** tab under the '**Application – Signed**' category. To continue to bind without an application select **Continue**. You will be brought to the below screen.

Request to Bind

You are requesting to bind the following product(s) effective 10/06/2021 for Green Acres Mall:

Product	Limit	Retention	Premium
Beazley Breach Response (BBR)	\$2,000,000	\$1,000	\$9,800

If any information is incorrect, click 'Cancel' and return to the Quote Options tab to make corrections. If all information is correct, click 'Continue' to send a bind request to Beazley.

Cancel Continue

This will summarize what quote option you have chosen for your client. Select 'Continue' and your bind request will automatically forward to our Bind Queue. You will also be cc'ed on the email to log the bind request.



After the bind request has been submitted you will be brought to our home page.

Save, Bind and Refer Tab:

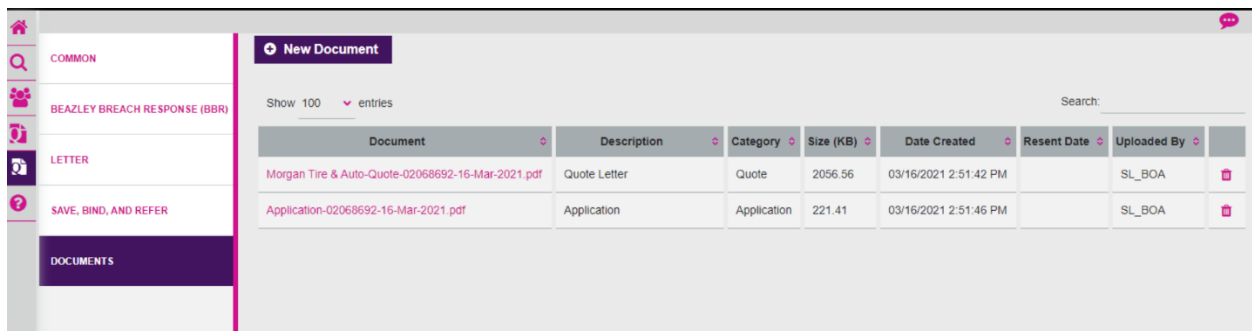
- 13. Underwriting Referral:** If you need to send an underwriting referral click on the Underwriting Referral tab and select the relevant reason for referral.

Once the 'Underwriting Referral' reason is selected please provide specific requirements for your referral in the 'Annotate' box and attach any relevant documents before clicking on the 'Save' button.

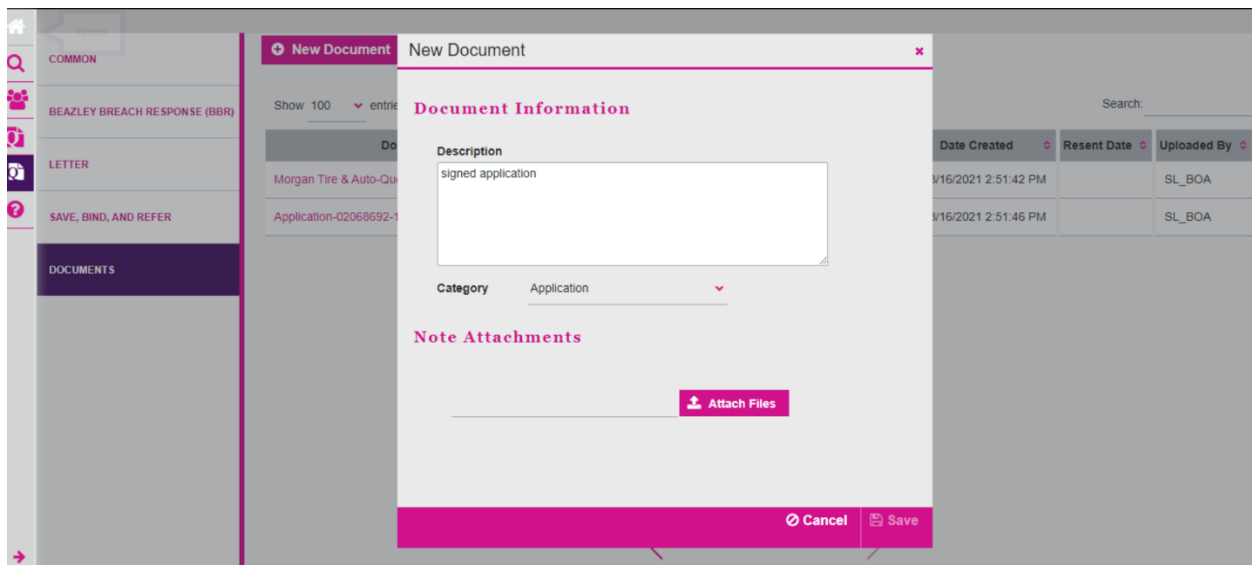
- 14. Request Help:** If you encounter any issues with submitting your risk, please refer to the 'Request Help' tab and select the most relevant option. A ticket will be submitted to our MyBeazley team at AskBeazley@beazley.com. The team will review the query and contact you directly for next steps.



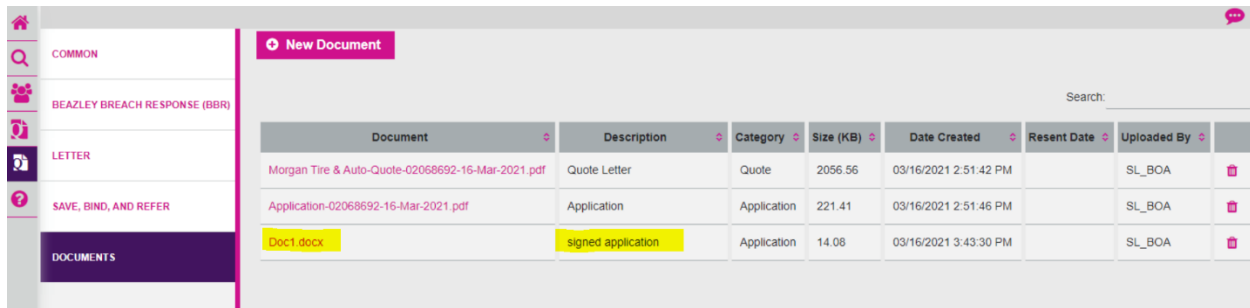
15. Documents Tab: from here you can access your generated quote and pre-filled application. You can also upload your signed application to the documents tab by clicking on the **New Document** button.



This will bring you to the below screen. From here you can enter the document name and select the category of the document, which would be “application” for uploading a signed application. Click on **Attach Files** and select the correct file from your own drive and then click on **Save**.

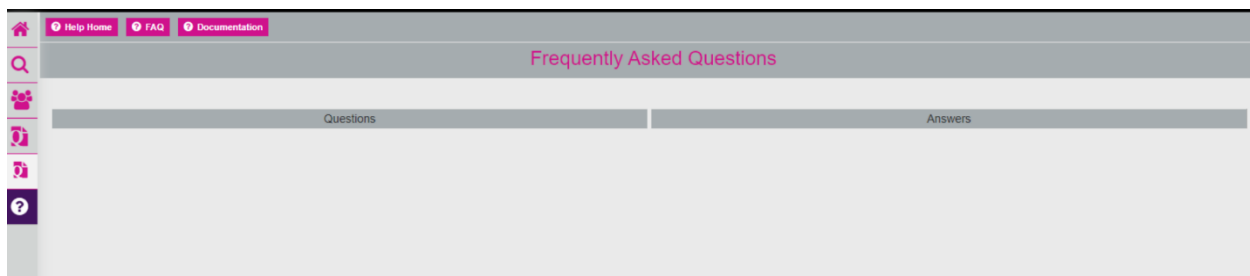


Once you've clicked on **Save** you will see your new document uploaded and in your documents list (highlighted below).



Document	Description	Category	Size (KB)	Date Created	Resent Date	Uploaded By
Morgan Tire & Auto-Quote-02068692-16-Mar-2021.pdf	Quote Letter	Quote	2056.56	03/16/2021 2:51:42 PM		SL_BOA
Application-02068692-16-Mar-2021.pdf	Application	Application	221.41	03/16/2021 2:51:46 PM		SL_BOA
Doc1.docx	signed application	Application	14.08	03/16/2021 3:43:30 PM		SL_BOA

16. Help Tab (?): This section of the portal is still under development and any feedback or suggestions are welcome, please send these to askBeazley@Beazley.com.



Questions	Answers