

myBeazley Broker Reference Guide

www.myBeazleyUSA.com/Quote

Document Version: v.1

Document Author: Customer Success Team

Date: 4.27.23

Table of Contents

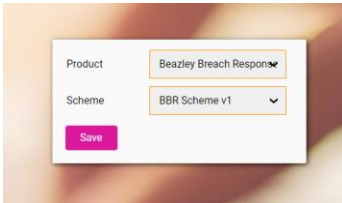
<i>How to Submit</i>	2
<i>How to Quote</i>	6
<i>How to Refer</i>	7
<i>How to Bind</i>	9

How to Submit

1. Select the enquiry box.



2. Select 'Beazley Breach Response' for 'Product' and 'BBR Scheme v1' for 'Scheme'. Press 'Save'.



3. Complete all fields outlined in red.
 - a. For field 'Website' a valid website is needed to submit on the portal. If the insured does not have a valid website, please email your submission to PE_Submissions@Beazley.com
 - b. For field 'Inception Date Unknown', if the answer 'Yes' is selected an **indication** will be offered instead of a **bindable quote**. In order to obtain a **bindable quote** this field will need to be updated to 'No' with a specified date listed in the field 'Inception Date'.

COMMON FIELDS

Save Cancel

Common Fields

- Insured Information

Named Insured Details

Name:

Street:

City:

State: Zip Code:

Website:

Risk Manager Information

Risk Manager Name: Risk Manager Email: Risk Manager Phone:

- Risk Information

Inception Date Unknown: Yes No

Inception Date:

Expiry Date:

Industry Group:

Industry Class:

NAICS Code:

Product:

Does the company have any THC marijuana exposure as a grocer, wholesaler, or medical or recreational retailer of marijuana?

Total Revenue for the last 12 months?

Total Employee Count:

- Classification Information

Submission Type:

External Quote ID:

Insurance Structure:

Program:

Affinity Identifier:

Initiative:

- Clearance

Once you have populated the required information in the Common Fields tab, please save your inputs so that a clearance check can be performed.

Clearance Status:

4. *Industry class is a mandatory field to be filled out in order to submit.*
 - a. *As a best practice, our recommendation is to search within the 'Industry Class' field first. If you are not familiar with NAICS you can utilize the keyword search capabilities from the [US Census website](#).*
 - b. *If you know the insured's 'NAICS Code' please fill in the field and 'Industry Class' and 'Industry Group' will autofill in accordingly.*
 - c. *If you know the insured's 'Industry Class' please fill in the field and 'NAICS Code' and 'Industry Group' will autofill in accordingly.*
 - d. *If you do not know the insured's 'Industry Class' or 'NAICS Code' selecting the most appropriate 'Industry Group' from the list will narrow down the options seen in 'NAICS Code' and 'Industry Class'.*

▼ Risk Information

Inception Date Unknown: Yes No

Inception Date:

Expiry Date:

Industry Group:

Industry Class:

NAICS Code:

Product: Beazley Breach Response

Does the company have any THC marijuana exposure as a grower, wholesaler, or medical or recreational retailer of marijuana? Yes No

Total Revenue for the last 12 months?

Total Employee Count:

5. Select the 'Save' button at the top of the screen. The 'Clearance Status' will be updated at the bottom of the screen to 'Submitted'.

COMMON FIELDS 13

Common Fields

The insured is eligible for mutual lines policy.

Please note that you cannot continue to quote unless your file clearance status is 'Reserved'. If your clearance status is 'Submitted', our Clearance team are reviewing your submission and will provide a status update once complete. If you:

▼ Insured Information

Named Insured Details

Name:

Street:

City:

State: Zip Code:

Website:

Risk Manager Information

Risk Manager Name: Risk Manager Email: Risk Manager Phone:

▼ Risk Information

Inception Date Unknown: Yes No

Inception Date:

Expiry Date:

Industry Group:

Industry Class:

NAICS Code:

Product: Beazley Breach Response

Does the company have any THC marijuana exposure as a grower, wholesaler, or medical or recreational retailer of marijuana? Yes No

Total Revenue for the last 12 months?

Total Employee Count:

▼ Classification Information

Submission Type:

External Quote ID:

Insurance Structure:

Program:

Affinity Identifier:

Initiative:

▼ Clearance

Clearance Status:

6. Once the clearance process has completed the 'Clearance Status' will be updated accordingly. Statuses that may appear in the 'Clearance Status' field are as follows:
- Submitted= Recently submitted, clearance result has not been generated yet
 - Pending Submission= Submitted, clearance result has not been generated yet
 - Reserved= Submitted and reserved, broker is able to proceed with quoting
 - Declined= Submitted and declined, broker is unable to proceed with quoting. Declination reason can be viewed under the 'Underwriting Guide' within the navigation pane.



Underwriting Guide

■ Rated Decline

- Prior cyber claim activity in past 5 years
- Insufficient information security and privacy controls

How to Quote

1. Once 'Clearance Status' reads as 'Reserved' you can proceed to the 'BBR Applications Questions' tab.

COMMON FIELDS: BBR APPLICATION QUESTIONS

Save Cancel

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 primary law or regulation? Yes No
 - Notified customers or any other third party of a data breach incident involving the Applicant? Yes No
 - Experienced an actual or attempted extortion demand with respect to its computer systems? Yes No

Ransomware Controls

- Does the company allow remote access to your network? Yes No
- Do you permit users remote access to web-based email (e.g., Outlook Web Access (OWA))? Yes No
- Does the company regularly (at least annually) provide other security awareness training, including anti-phishing, to all individuals who have access to your organization's network or confidential/personal data? Yes No
- Does the company implement critical patches and update systems (within 2 months)? Yes No
- Does the company scan incoming emails for malicious attachments and/or links? Yes No
- Does the company protect all of their devices with anti-virus, anti-malware, and/or endpoint protection software? Yes No
- Does the company regularly back up critical data? Yes No
- Does the company use Microsoft Office 365? Yes No
- Does the company have any end of life or end of support software on their network? Yes No

2. Answer all application questions. Select 'Save'.
3. Proceed to 'Quote Options' tab to view available options and select which options you'd like to appear on the quote letter. Select 'Save'.

COMMON FIELDS: BBR APPLICATION QUESTIONS

QUOTE OPTIONS

Save Cancel

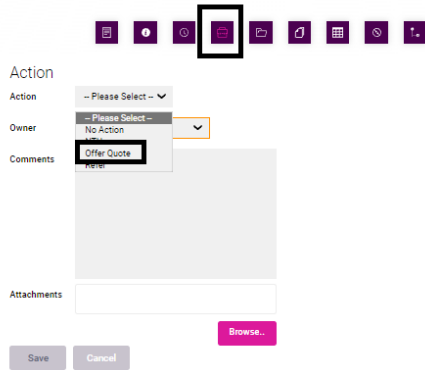
Quote Options

Industry: Administration of Course Revenue: \$500,000

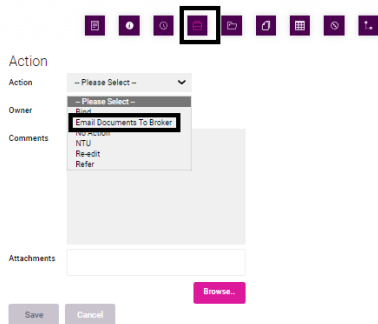
Options	Notified Individuals	Policy Aggregate Limit of Liability	Each Claim Retention	Breach Response Services Retention	Legal Services Retention	Premium
1	100,000	\$ 1,000,000	\$ 1,000	\$ 1,000	\$ 300	\$ 3,020
2	100,000	\$ 1,000,000	\$ 2,500	\$ 2,500	\$ 1,250	\$ 2,720
3	100,000	\$ 2,000,000	\$ 1,000	\$ 1,000	\$ 300	\$ 3,640
4	100,000	\$ 2,000,000	\$ 2,500	\$ 2,500	\$ 1,250	\$ 3,260

Select all options

4. Go to the 'Actions and History' tab and select 'Offer Quote' under 'Action' and select 'Save'.
 - a. The system will automatically email you the quote documents.

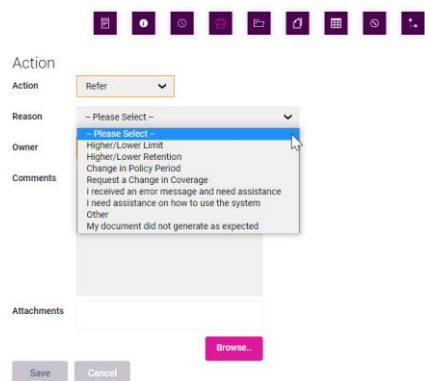


5. If you do not receive an email containing your quote documents for any reason, you can re-send the quote documents by navigating to the 'Actions and History' tab and selecting 'Email Documents to Broker' under 'Action'. Select 'Save'.



How to Refer

1. Go to the 'Actions and History' tab and select 'Refer' under 'Action'.
2. Select a referral 'Reason' from the drop down.



3. Within the 'Comments' field, provide a detailed explanation / reasoning for why you are requesting this referral.
4. Optionally, select the 'Browse...' button to upload any documentation supporting your request.
5. Select 'Save'



Action

Action

Reason

Owner

Comments
Can you offer a \$3M option? Insured has a contract that requires this. Give me a call to discuss - I'm open to hearing what you can do. I've attached the contract for your review.
Thanks - Erin

Attachments

[Browse..](#)

[Save](#)

[Cancel](#)

- The risk will progress into 'Referred' status and allocate to an underwriting or support team for review.

INSURED: Erin Test - Jonah's Kabob
 REFERENCE: RBQ/2881
 STATUS: Referred
 ALLOCATION: Underwriter (UW West)
 OWNER: Erin Henne

- Beazley will review your referral request and allocate the risk back to you within 24 hours.
- To view comments that you have made to Beazley and comments that Beazley has made for you, navigate to the 'Underwriting Guide' within the navigation pane.



Underwriting Guide

Information

- Allocate to Broker - Other - Erin Henne - 03-May-2023 - 17.30 - Erin - It was nice talking to you earlier today. As discussed we cannot offer a \$3M.

Thanks - Erin UW

- Refer - Higher/Lower Limit - Erin Henne - 03-May-2023 - 17.19 - Can you offer a \$3M option? Insured has a contract that requires this. Give me a call to discuss - I'm open to hearing what you can do. I've attached the contract for your review.

Thanks - Erin

How to Bind

- Go to the 'Actions and History' tab and select 'Bind' under 'Action'.
- If you have a signed BBR Application attach in the 'Attachments' section. If you do not have a signed BBR Application you can still proceed with binding; however, a policy will not be issued until a signed BBR Application is received.
- Select one option to bind.

Action: Bind
 Reason: Terms accepted
 Allocation: Broker (Beazley Broker)
 Owner: JH Henne Co

Have you attached a signed BBR Application? If not please attach it in the Attachments section below. Yes No

Inception Date: 30-Apr-2023
 Expiry Date: 30-Apr-2024

Options	Notified Individuals	Policy Aggregate Limit of Liability	Each Claim Retention	Breach Response Services Retention	Legal Services Retention	Premium
1	100000	\$ 1,000,000	\$ 1,500	\$ 1,000	\$ 300	\$ 3,020
2	100000	\$ 1,000,000	\$ 2,500	\$ 2,500	\$ 1,250	\$ 2,750

Comments: [Text area]
 Attachments: [Text area]

Buttons: Save, Cancel, Bind

- Select 'Save'.