

## Renewal process

### Renewal invitation

When you receive a notice advising that a policy is up for renewal, you will be able to view, and if required, update the renewal quote.

### View renewal quote

When logged into Broker Xchange:

#### Option one:

1. Select the 'Quotes and policies' tab on the ribbon across the top.
2. Click 'Find quote/policy'
3. In the 'Quote/policy number' field, enter or cut/ copy and paste the policy number provided to you
4. Click 'Find'
5. Once search results are visible, click on the 'Client Name' to take you to the client summary page
6. Renewal quote will be sitting under the 'Renewals' section with status 'Under Renewal'. Click on any of the hyperlinks as shown below to open the renewal quote

Home | **Quotes and policies** | Claims | Policy Wordings

Find / add client | **Find quote / policy** | Client details | Summary

Enter quote / policy details

Type: ALL

Quote / policy number: P000020286PUR

Search tip - You can use % as a wildcard, for example: sun% will find sung, suns, sunset, sunrise.

Clear search | Find

Search results

Client name	Quote / policy number	Product	Status	Expiry	Modified
John Smith	P000020286	PUR	Live	31/10/2023	03/08/2023

*NB: If you incorrectly navigate to the 'Live' policy, use 'Back to Client' action button to locate the 'Under Renewal' version.*

Renewals

Client name	Policy number	Product	Status	Expiry	Modified
John Smith	P000020286 / 16	PUR	Under Renewal	31/10/2024	03/08/2023

#### Option two:

1. Select the 'Quotes and policies' tab on the ribbon across the top
2. Click 'Find/add client'
3. In the 'Client Name' field, type in your client's name or use the % as a wildcard, for example: sun% will find sung, suns, sunset
4. Click 'Find'
5. Click 'View client' from the listed search results which will take you to all the client policies
6. Renewal quote will be sitting under the 'Renewals' section with status 'Under Renewal'

Home | **Quotes and policies** | Claims | Policy Wordings

Find / add client | **Find quote / policy** | Client details | Summary

Enter client details

Client name: %smith% or JOHN SMITH

Client code:

Search tip - You can use % as a wildcard, for example: sun% will find sung, suns, sunset, sunrise.

Add client | Clear search | Find

Renewals

Client name	Policy number	Product	Status	Expiry	Modified
John Smith	P000020286 / 16	PUR	Under Renewal	31/10/2024	03/08/2023

## Actions/ options available:

The following available actions/ options are dependent on the product type/ profile set up with QBE.

**Option One** reflects full functionality/ capability in relation to the Renewal Policy, whereas **Option Two** reflects limited functionality/ capability.




Functionality	Option 1 Full	Option 2 Limited	Description/ Explanation
View terms	✓	✗	Ability to view the terms of the policy in renewal
Edit	✓	✗	Ability to edit/ maintain the details of the policy
Download	✓	✓	Ability to download the renewal invite
Email to myself	✓	✓	Allows you to send the policy/ quote to your email
Back to client	✓	✓	Allows you to send the policy/ quote to your email
Lapse renewal	✓	✓	Ability to lapse the renewal invite. Select the reason from the drop-down menu. This selection is compulsory, then click 'OK'. This policy will now show a 'cancelled' status.
Add risk	✓	✗	Add more risks
Delete risk	✓	✗	Delete selected risks
View documents	✓	✓	Ability to view documents previously uploaded into the policy
Add document	✓	✓	Ability to add a document against the policy
Bind (then close)	✓	✓	Ability to 'bind' the policy. Once bound, upload closing documents, select 'Close'. Confirm that all closing documents have been uploaded and enter your invoice number, click 'Proceed'. Policy will now become 'Live'. This renewal policy now replaces the previous live policy
Submit referral	✓	✗	Ability to refer back to QBE Underwriter with comments, then proceed

Should you have any questions or require support for this document, please contact your QBE Underwriter or email [brokerxchange@qbe.com](mailto:brokerxchange@qbe.com)