



# DOLMEN UNDERWRITING BROKER USER MANUAL 2013

***This user guide is designed to help you transact business with the  
Insurance Administrators via the online Insurance Trading system:  
[www.dibl.com](http://www.dibl.com)***

***For further assistance please call the Insurance Administrators using  
the details on the "Contact Us" page of the website***

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## \*Important Information\*

- Always use your own user name and log in for the site.
- If you work between offices or are part of a group of brokers that have come together it is important to use the user name and login you have for the office you wish the policy to be placed with. i.e. If Dolmen had Dolmen Artane and Dolmen Santry and a client comes into take out a policy in DOLMEN Santry you will need to use the Santry log in and not the Artane Login. If you use the Artane login we can not do an agency transfer to Santry. Always use the correct login that corresponds to the office you are working in.
- Make sure when running the quotation through on the site you have selected the correct product to which spike is quoting.
- Make sure that you read each question carefully and answer every question correctly on the site. If questions are left blank the quotation will refer over to us and we will then refer it back to you to complete the information for a quotation.
- If the quotation refers to underwriters please give as much information as possible in the referral box for underwriters to consider the quotation.
- If an amendment is done on the site please advise in the referrals box the changes made.
- Once a quotation or an amendment is within our criteria and has been released by underwriters you must go into the site and hold cover in order for the quote or the amendment to be made live on the site. If they are not held on cover the premiums and amendments will not be live on your account.
- We can not back date quotations/amendments that are not held by the broker's office. The site is real time and will only be placed on cover once held and on the date required i.e. today or a future date.
- When a referral is sent by underwriters off the site it is sent to a dedicated person in your office that has been nominated to look after or forward onto a relevant department to look after.
- If a Staff leaves a broker or if the nominated person from your office that looks after claims, quotes, referrals, accounts has changed an email will need to be sent to our office advising of who the new staff member is. You can email amendments of Staff to [info@dolmen-insurance.ie](mailto:info@dolmen-insurance.ie) noting the Staffs full name, the office and address they are to be added to, there telephone number and email address.
- HAL issues out our referrals, quotations, declinature, renewals and lapse notifications. HAL emails can not be re sent as once the above has been processed it is automatically issued. If you have mislaid your HAL email you can go onto the site and view referrals, declinature and lapses in the Journal. Print off documentation in the Risk details and hold quotes and amendments in the risk details screen also.

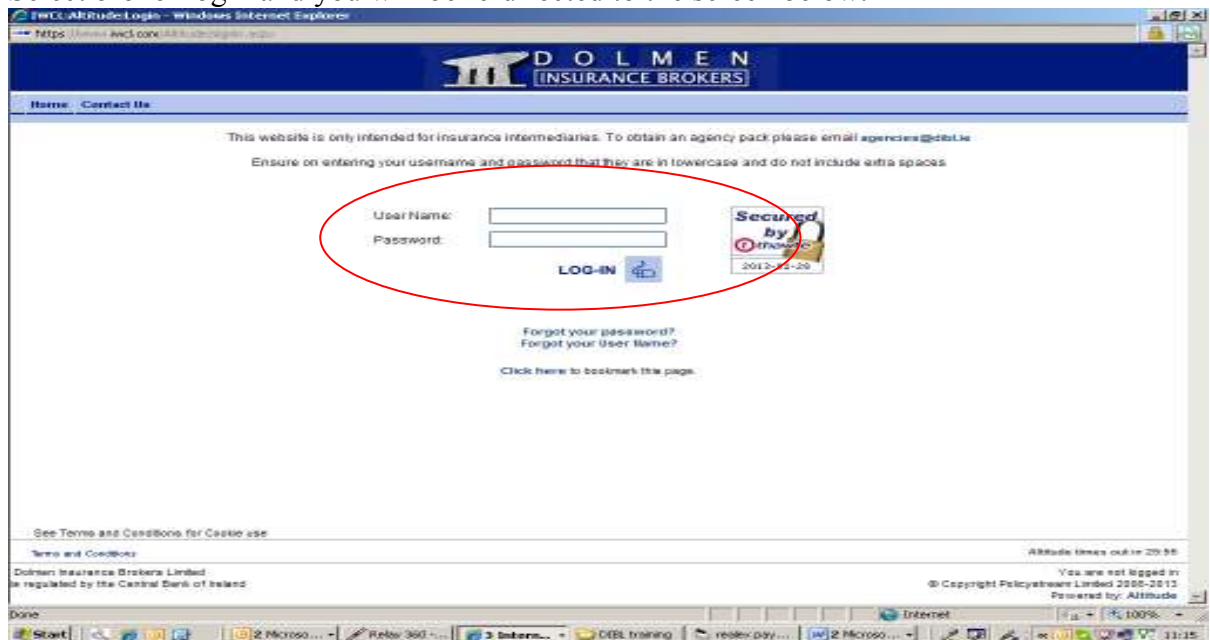
## NEW USER LOG IN INSTRUCTIONS

Once you have received your user name and password from HAL by email please follow the instructions below.

DIBL Web address – [www.dibl.ie](http://www.dibl.ie)



Select broker login and you will be re-directed to the screen below.



Enter your username and password given by HAL to enter our site

**\*\*Tip: copy and paste user name and password from email as this is case sensitive\*\***

If you are a new user you will be then redirected to this page.



**You will need to click on Dolmen underwriting word and our terms of business will appear. You will need to scroll down the screen to accept our terms of business.**

**Once you accept the terms the screen will then start up for you to log in again.**

Log in with user name and password that you would have received from HAL. The screen will then direct you into changing your password that will be easy for you to remember.

When you are logged into the DIBL site this is the screen you will work from.



If you are looking to quote, click on the relevant tab and you will be re-directed into the page below.



Select the required product and you will be redirected into the quotation details screen. Proceed to answer **all** questions to obtain a quotation.



If you are looking for a client please select the **Risks** button.



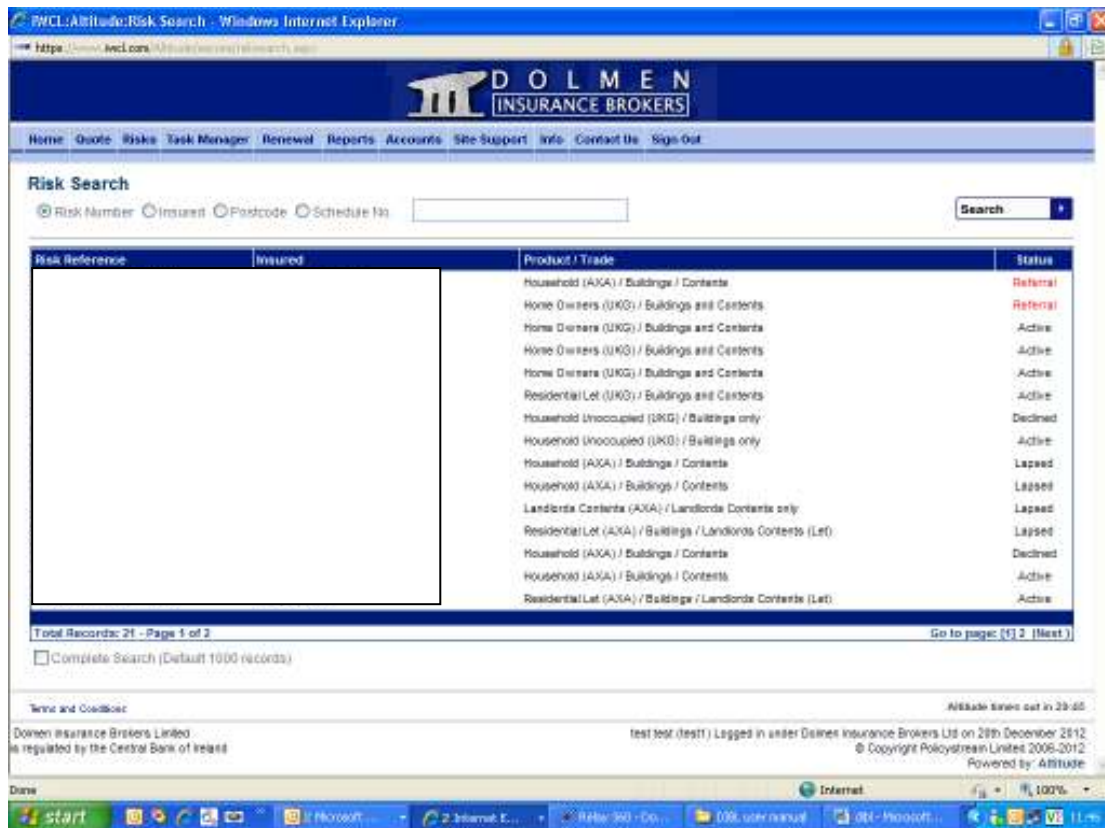
If underwriting has referred something to you it will appear in this tab as a referral. You will need to either amend the risk or answer our queries and refer back to underwriters for this to appear on our task manager.

**If you amend the risk or answer our queries and do not refer to underwriter or refer to underwriter later it will not appear in our task manager.**

### **STATUS DEFINITIONS ON “RISK SEARCH”**

<b>Status</b>	<b>Definition</b>
<b>Quote</b>	Quotation Stage
<b>Referral</b>	Risk needs to be referred to the Underwriters
<b>Referred</b>	Awaiting Underwriters decision
<b>Declined</b>	The risk has been declined as unacceptable
<b>Cancellation Requested</b>	Awaiting Underwriters to authorise cancellation request
<b>Cancelled</b>	Risk has been cancelled
<b>NTU</b>	The risk has been Not Taken Up
<b>Referral (Endorsement)</b>	Endorsement request needs to be referred to Underwriters
<b>Quote (Endorsement)</b>	Endorsement has been agreed by Underwriters and is awaiting Hold Cover instructions from you
<b>Lapsed (Endorsement)</b>	The quotation for the endorsement has now lapsed and the Original risk is still Active
<b>Declined (Endorsement)</b>	The endorsement request has been declined by Underwriters and the policy remains the same as the last active risk
<b>Active (Endorsement)</b>	The Endorsement has been activated and replaces the original policy
<b>Cancellation Requested (Endorsement)</b>	Awaiting Underwriters to authorise cancellation request.
<b>Cancelled (Endorsement)</b>	Risk has been cancelled
<b>Future Endorsement (Endorsement)</b>	An Endorsement has been made Active but with a future inception date





You can search for a client by risk number, insured (clients name) post code and schedule number.

Please note that risk number and insured's is the main ways to pull up clients quote/details.












If it notes a quote/policy as **referral** it means that we have query on this risk and we have sent the query to you.

If it notes a quote/policy as **referred** it means that we have received the answer to your query and it's in a queue to be processed.

## Main screen Tabs

<b>Tabs</b>	<b>Use of tabs</b>
Home	Home screen
Quote	All products that we quote on
Risks	Can pull clients file with risk number
Claims	Can pull clients claim file with risk number/claim number/name
Task Manager	All referrals and policies that are been worked on are in this tab
Accounts	Accounting area

## Risk Details Tabs for DIBL UKG and AXA

<b>Tabs</b>	<b>Sub Tabs</b>	<b>What each tab is for</b>
View Risk 		View SOF only
Edit Risk 		Edit the clients details
Documents 		SOF, Invoice and schedules to download in this tab
Administration 	Authorise 	Authorising an Risk (quoting)
	Decline 	Declining a risk (must give reason for declining)
	Refer to Agent 	Referring to broker for additional information/pictures or risk etc
	Task manager 	Directs you into task summary
	Journal 	“notepad” any referrals sent to brokers and there responses are noted on this tab
Comments 		Comments tab. Be aware for noting comments as private and public.
Summary 		Click on summary and it redirect you out of the risk details page back onto the summary page to view clients previous years if any.

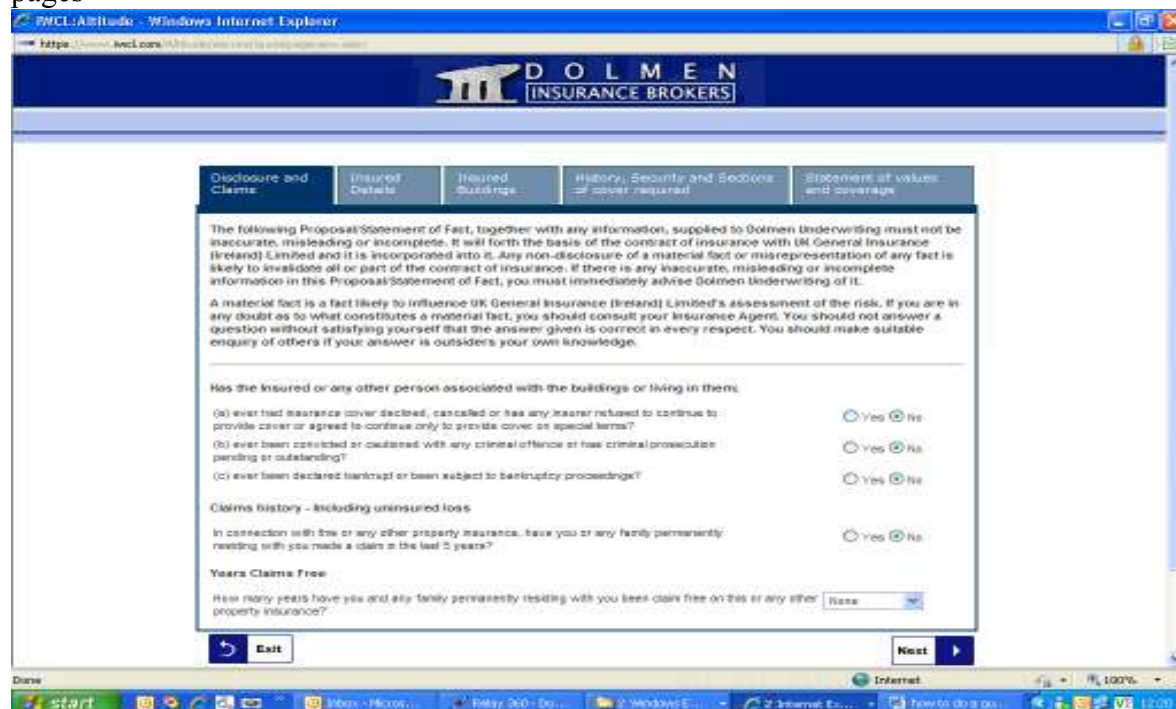
## HOW TO DO A QUOTATION

Select **Quote** from the top navigation bar along the top of the screen



You can also download the policy wording on each product available to your agency.

Once you select the product required you will be re-directed to the statement of fact pages



Complete the required fields and click **Next** at the end of each page and **Back** will bring you to the previous page.

The first screenshot shows the 'Insured Details' form. It includes fields for Name of the Insured (MR Joe Bloggs), Marital Status (Married), Date of Birth of the Insured (01/01/1960), Daytime telephone number, and Email Address. It also has a section for the Insured's occupation with a list of options and radio buttons for Yes/No. Below this is the Address of Premises to be Insured, with fields for Address (Line 1), Town, Address (Line 2), Address (Line 3), Town, and County. It also includes a section for Mortgage interest with a Yes/No question.

The second screenshot shows the 'Details of the Buildings to be Insured' form. It includes fields for Type of residence (Semi-detached house), Approximate year built (1960), and a section for Please confirm the property was rewired, re-roofed and repointed after 1978. It also has a section for Does the property have a basement or cellar? and Is any part of the property tiled?. Below this is the Number of bedrooms (5). It also includes a section for Are the Buildings? with three sub-questions (a), (b), and (c) and radio buttons for Yes/No. It also includes a section for Is the Home? with three sub-questions (a), (b), and (c) and radio buttons for Yes/No. At the bottom of the form are Back, Exit, and Next buttons.

Please note that every single question on the screen must be answered. If it is not the quote details will be referred back to fully complete.

**FWCL:Altitude - Windows Internet Explorer**

http://www.avic.com/Altitude/insure/insurepage.htm?CL=EN&CL=EN&CL=EN

**Disclosure and Claims | Insured Details | Insured Buildings | History, Security and Sections of cover required | Statement of values and coverage**

**Have the Buildings:**

(a) ever suffered from flooding or are in an area troubled by flooding? ☐ Yes ☒ No

(b) ever suffered from or been monitored for subsidence, landslip or heave and/or are in an area troubled by subsidence, landslip or heave? ☐ Yes ☒ No

(c) ever had a survey carried out that reported settlement or movement of the buildings? ☐ Yes ☒ No

**Protections**

Are the premises protected by an alarm?

Are at least 2 working smoke detectors fitted in the insured property? ☒ Yes ☐ No

Are all external doors are fitted with a five lever mortice dead-locks and all accessible windows are secured with key operated security locks? ☒ Yes ☐ No

Is the Home left regularly unattended day or night other than normal working hours? ☐ Yes ☒ No

**Sections of cover and excess required**

What cover is required?

Excess required?

Who is your current insurer?

**Terms and Conditions** Altitude Screen out in 29:00

Dorrien Insurance Brokers Limited is regulated by the Central Bank of Ireland test test (test!) Logged in under Dorrien Insurance Brokers Ltd on 28th December 2012  
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Powered by: Altitude

**It is important that the Insured should ensure the values given below are adequate, as being under insured may reduce the amount recoverable in the event of a claim.**

**Section 1 - Buildings:**  
The Home and its decorations, including fixtures and fittings attached to the Home. This amount must include all outbuildings, garages, domestic oil and gas pipes, distressed flint fuel tanks, swimming pools, tennis courts, drives, patios, terraces, walls, gates and fences.

Policy automatically covers rebuilding costs of up to €500,000. Is this sufficient? ☒ Yes ☐ No

**Section 2 - Contents:**  
Household goods and personal property within the home.

Policy automatically covers contents up to €120,000. Is this sufficient? ☒ Yes ☐ No

Accidental damage extension: ☐ Included ☒ Not included

**Valuable and personal possessions away from the Home:**  
Unspecified all risks (maximum value any one item €1,500)  
Unspecified all risks sum insured (minimum €2,500)

**Specified all risks:**  
Pool cycle cover away from the Home   
Mobile Phones:   
Cameras / Camcorders:   
Hearing Aids:   
Personal Laptops:   
All Other:

Are any items with a value greater than €1,500 included in the above? ☐ Yes ☒ No

**Section 3 - Liability**  
A. Legal Liability to Domestic Employees



FWCL:Altitude - Windows Internet Explorer

https://www.fwcl.com/Altitude/quote/quote-refer.aspx

Policy automatically covers contents up to €100,000. Is this sufficient?

Accidental damage extension:

Valuable and personal possessions away from the Home: Unspecified all risks (maximum value any one item €1,500) Unspecified all risks sub-insured (minimum €2,500)

Specified all risks:

Pedal cycle cover away from the Home:

Mobile Phones:

Cameras / Camcorders:

Hearing Aids:

Personal Laptops:

All Other:

Are any items with a value greater than €1,500 included in the above?

Section 3 - Liability:

A. Legal Liability to Domestic Employees:

B. Legal Liability to the Public:

MATERIAL FACTS:

Are there any material facts or any other information which needs to be disclosed to the Insurers which has not already been answered in the previous questions and statements?

☒ Yes Insured/Agent can confirm to have read and understood all questions relating to this quotation

Warning:

It is vital that you ensure all information contained within this Proposal/Statement of Fact is accurate, complete and not misleading. If any of the information is false, inaccurate or untrue, it is likely to invalidate this policy of insurance and no claim under the policy will be considered.

Back Exit Quote

When the all questions are read and are fully completed tick the box to advise that you

have read and understood all questions and select



FWCL:Altitude - Windows Internet Explorer

https://www.fwcl.com/Altitude/quote/quote-refer.aspx

**DOLMEN INSURANCE BROKERS**

Home Quote Risks Task Manager Renewal Reports Accounts Site Support Info Contact Us Sign Out

**Quote Refer**

No Quote

Quote Reference: DOMC00048899/2012

Your statement of fact / proposal needs to be referred to Dolmen Insurance Brokers Ltd for assessment for the reasons shown below:

Age of Building

Cook refer

Flood area refer

Before referring to an Underwriter, please add your comments in the box below:

If you would like to discuss this referral please call 00 353 1 8022375 to speak to an Underwriter quoting your Quote Reference number in all communications.

Refer to UIW Refer later

Terms and Conditions

Altitude times out in 20:00

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The quote will then refer. It will show why the quote is referring to us.

Please advise in the box provided, details that can help with regards to the quotation. The above quotation has referred due to the following:


- Age of building is referring because the property is pre 1920. I have noted in the quote it was re-roofed, re-wired and re-plumbed after 1970. You could advise when it was re-roofed, re-wired and re-plumbed?
- It has referred as it's a Cork refer/Flood refer area – if you know advise if the area has every flooded or suffered subsidence.

Then click refer to U/W. This will then refer over to underwriters for consideration. If you click refer later it **will not** appear on the underwriters Task Manager.

If the quote is within our quoting criteria we will release the quotation. If it is not we will decline the quotation advising of why it was declined.

\*\*note – if you have made an error click . You can then go back and edit risk  and .



## **RETRIEVING AND PRINTING A QUOTATION**

To retrieve a previous quotation click on the  button on the navigation bar at the top of the screen

All previous quotations created by your agency will then be displayed on the **Risk Search** screen


You can search for the quotation using risk number (quotation reference), Insured or town. Schedule number only applies if the risk has been held on cover

Placing your cursor over the desired risk and clicking once will take you to the **Risk Summary** screen, If further information is required then highlighting the quotation again on the **Risk Summary** screen and clicking once will take you to the **Risk Details** screen from where you can print the quotation.

To print the quotation and summary of cover click on the **Documents** button  and then click on the **View** button  of the **Quotation** document line on the **Document Summary** screen.


Select the document you wish to see/print by clicking the view button

When prompted, click on **Open** to access the document. NB to access documents you will need Adobe Acrobat Reader

If you do not currently have this application please click on the  button on the navigation bar at the top of the screen where you will find a link to download this software for free.




## **HOW TO EDIT A PREVIOUS QUOTATION**


1. Retrieve the quotation and go to the **Risk Details** screen by following the above instructions
2. If the **Risk Status** is showing as **Quote / Quote** you will see the **Edit Risk**  button.

Clicking this button will take you to the quotation process again where you can edit the quote

## **HOW TO REFER A QUOTATION**

Retrieve the quotation and go to the **Risk Details** screen

If **Risk Status** is at **Quote / Referral** you will see the **Refer to U/W**  button which you need to click once

Enter all relevant details in the text box to help Underwriters with their decision and click the  button.

## HOW TO CHECK A REFERRAL AND HOW TO REPLY TO A REFERRAL

In the Risk tab select the client you are looking for. On the left hand side it will indicate. **Referral, Referred, Quote, Decline, Lapsed, Active.**

**Risk Search**

Search: [ ]

Product / Trade	Status
Household Unoccupied (UKG) / Buildings / Contents	Quote
Residential Let (AXA) / Buildings only (Lift)	Quote
Home Owners (UKG) / Buildings and Contents	Referral
Household (AXA) / Buildings / Contents	Referral
Home Owners (UKG) / Buildings and Contents	Referral
Home Owners (UKG) / Buildings and Contents	Active
Home Owners (UKG) / Buildings and Contents	Active
Home Owners (UKG) / Buildings and Contents	Active
Residential Let (UKG) / Buildings and Contents	Active
Household Unoccupied (UKG) / Buildings only	Declined
Household Unoccupied (UKG) / Buildings only	Active
Household (AXA) / Buildings / Contents	Lapsed
Household (AXA) / Buildings / Contents	Lapsed
Landlords Contents (AXA) / Landlords Contents only	Lapsed
Residential Let (AXA) / Buildings / Landlords Contents (Let)	Lapsed

**Risk Summary**

**Statistics**

Risk No: 00049899  
 Insured: MR Joe Bloggs  
 Business Address: 1234 Mainstreet, Cork City, Cork  
 Correspondence Address: 1234 Mainstreet, Cork City, Cork  
 Product / Trade: Home Owners (UKG) / Buildings and Contents  
 Agent: Dolmen Insurance Brokers Ltd

Year	Version	Status	Inception	Expiry	Premium (Gross)	PM / AP / BP Paid	Cash / MTU Paid	Claim
2012	001	Referral			Not available			

Total Premium (Gross): €8.00

Once you have selected your client you will be re-directed into Risk Summary. Click on Referral under Status. This will bring you into the Risk details section.

Once in the risk details screen you can now see why the policy is been referred. If you put your curser over Administration a drop down will appear. Select Journal.



In this screen if there is a message from underwriters it will appear in the box below noting the user who sent the message, the time and date it was sent and the message will appear in the additional information box.

If you have selected refer to underwriter later at quotation stage this is what the journal will look like.

Please note it is **very important** that you have your own user name and password as when you are answering a referral for an underwriter your username pulls into the Journal. If you do up a quotation, set up a policy, make a mid term alternation or lapse a policy it will all show in the Journal the time, date and the user name.

**Risk Journal**

Home Quote Risks Task Manager Renewal Reports Accounts Site Support Info Contact Us Sign Out

**Risk Journal**

All Entries Current Version Risk Summary **Risk Details**

Status: Quote - Referral  
Risk Number: 00040899  
Risk Version: 001

Created	Description	Additional Info	User
28/12/2012 12:37:00	Document Added	QuoteRef	test test (Dolmen Ins)
28/12/2012 12:37:00	System Terms on Initial Quote	DOL0001, DOL0004a, DOL0021, DOL0048	test test (Dolmen Ins)
28/12/2012 12:37:00	Commission Set	Commission @ 28/12/2012 is GP = 15.0000% HPB = 15.0000% HPC = 15.0000% HPAR = 15.0000% %	test test (Dolmen Ins)
28/12/2012 12:37:00	Mid Premium For Cancellation	Mid Premium For Cancellation: 40.00 Refund Fee On Cancellation: Year	test test (Dolmen Ins)
28/12/2012 12:37:00	Risk Created		test test (Dolmen Ins)

Total Records: 5 - Page 1 of 1


Terms and Conditions: [View](#) [Print](#)

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If you select **risk details** this will redirect you back into the risk details page so you can refer to underwriter



Select the refer to U/W  so you can reply to the message left by underwriters



Remember answer the queries with as much information as possible and always select refer to U/W so it will appear in the underwriters Task Manager.



## HOW TO PLACE A POLICY ON COVER

Once a quotation is released click on quote underneath status and this will re-direct you into the risk details page.

The screenshot shows the Dolmen Insurance Brokers website in a Windows Internet Explorer browser. The page title is "Risk Summary". The header includes the Dolmen logo and navigation links: Home, Quote, Risks, Task Manager, Renewal, Reports, Accounts, Site Support, Info, Contact Us, and Sign Out. The main content area displays the following information:

**Risk Summary**

**Statistics**

Risk No: 00049899  
Insured: MR Joe Bloggs  
Business Address: 1234 Mainstreet, Cork City, Cork  
Correspondence Address: 1234 Mainstreet, Cork City, Cork  
Product / Trade: Home Owners (UKG) / Buildings and Contents  
Agent: Dolmen Insurance Brokers Ltd

Year	Version	Status	Inception	Expiry	Premium (Gross)	PM / AP / RP Paid	Canc / RTU Paid	Claim
2012	001	Quote			€477.92	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Total Premium (Gross): €477.92

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The screenshot shows the Dolmen Insurance Brokers website in a Windows Internet Explorer browser. The page title is "Risk Details". The header includes the Dolmen logo and navigation links: Home, Quote, Risks, Task Manager, Renewal, Reports, Accounts, Site Support, Info, Contact Us, and Sign Out. The main content area displays the following information:

**Risk Details**

**Actions:** Edit Risk, Hold Cover, Refer to LTV, Documents, Administration, Comments, Summary

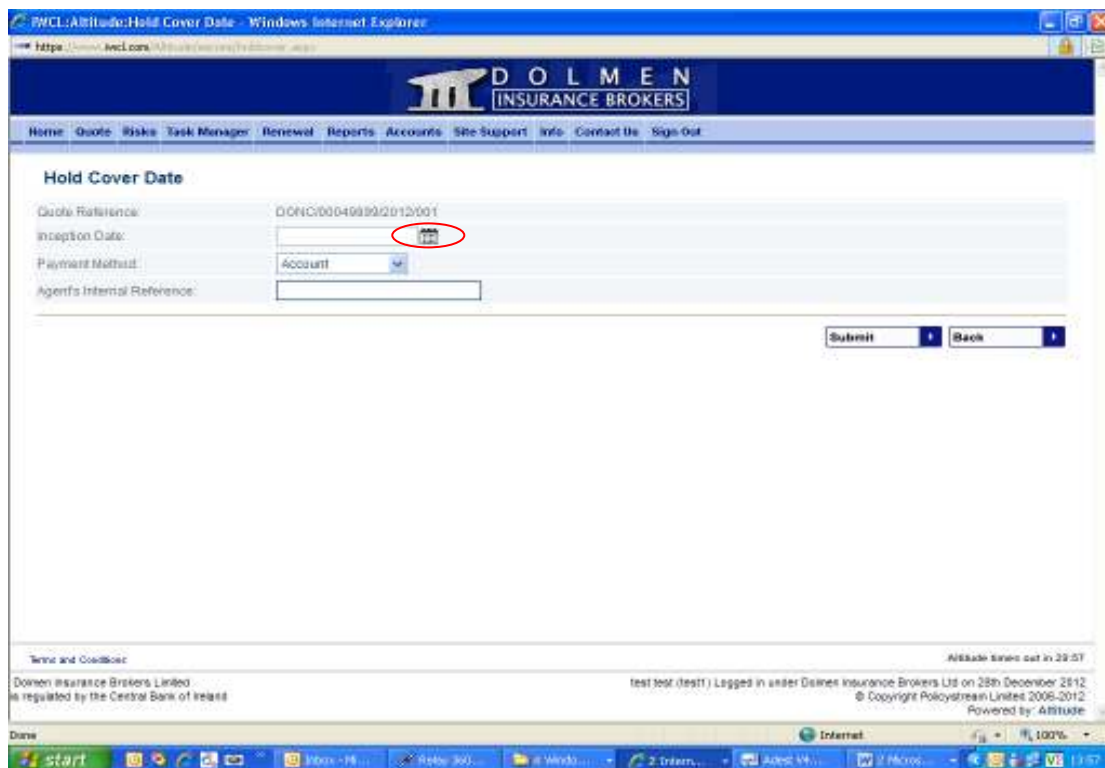
Risk Status: Quote / Quote  
Risk Number: 49899  
Risk Year / Version: 2012 / 001  
Insured: MR Joe Bloggs  
Business Address: 1234 Mainstreet, Cork City, Cork  
Correspondence Address: 1234 Mainstreet, Cork City, Cork  
Product / Trade: Home Owners (UKG) / Buildings and Contents  
Agent: Dolmen Insurance Brokers Ltd

Agents Phone Number: 01 8672121  
Agents Internal Reference:  
Agent Premium Load: 60.00  
Premium (Gross): €477.92  
Commission: €65.42  
Cover Payment Method: Not known  
PM / AP / RP Paid: No  
Canc / RTU Paid: No  
Claim: No  
Refer Process: Yes  
Refer as Previous Manual Adjustment: No  
Comments Attached: 0  
Linked Risks

Click on the Hold cover button  if you wish to place the policy on cover.



You will need to read the above and accept the certificate wording to proceed with cover.



Once you have accepted the certificate wording you will need to input an inception date and the name of the user placing the policy on cover.





Please note that the site works in real time so we can not back date cover.





The policy has now been placed on cover.


Please note what the following tabs are for:

**Endorse Risk**  If you want to make any amendments to the policy.

**Documents**  Where you can find schedules, statement of facts, quotations and invoice.

**Administration**  You can select Journal from the administration tab. You can see if queries are left in this tab from underwriters.

**Comments**  You can note comments here.

**Summary**  This will re-direct you out onto the Risk summary page.

## HOW TO PROCESS AN MTA AND HOLD COVER

In risk details select **endorse risk** 



**Risk Details**

**Endorse Risk** Documents Administration Comments Summary

Risk Status:	Active / Active
Risk Number:	40600
Risk Year / Version:	2012 / 001
Period:	28/12/2012 to 27/12/2013
Insured:	MR Joe Bloggs
Business Address:	1234 Mainstreet, Cork City, Cork
Correspondence Address:	1234 Mainstreet, Cork City, Cork
Product / Trade:	Home Owners (UKG) / Buildings and Contents
Inception / Expiry:	28/12/2012 to 27/12/2013
Agent:	Dolmen Insurance Brokers Ltd
Agents Phone Number:	01 8672121
Agents Internal Reference:	
Agent Premium Load:	60.00
Premium (Gross):	€477.92
Commission:	€65.42
Cover Payment Method:	Account
PM / AP / RP Paid:	No
Cancellation Paid:	No
Claim:	No
Relat Process:	Yes
Refer as Previous Manual Adjustment:	No



**Disclosure and Claims** Insured Details Insured Buildings History, Security and Sections of cover required Statement of values and coverage

Enter the Effective Date for this Endorsement (DDMM/YYYY) 28 December 2012

The following Proposal/Statement of Fact, together with any information, supplied to Dolmen Underwriting must not be inaccurate, misleading or incomplete. It will form the basis of the contract of insurance with UK General Insurance (Ireland) Limited and it is incorporated into it. Any non-disclosure of a material fact or misrepresentation of any fact is likely to invalidate all or part of the contract of insurance. If there is any inaccurate, misleading or incomplete information in this Proposal/Statement of Fact, you must immediately advise Dolmen Underwriting of it.

A material fact is a fact likely to influence UK General Insurance (Ireland) Limited's assessment of the risk. If you are in any doubt as to what constitutes a material fact, you should consult your Insurance Agent. You should not answer a question without satisfying yourself that the answer given is correct in every respect. You should make suitable enquiry of others if your answer is outside your own knowledge.

Has the Insured or any other person associated with the buildings or living in them:

(a) ever had insurance cover declined, cancelled or has any insurer refused to continue to provide cover or agreed to continue only to provide cover on special terms? ☐ Yes ☒ No

(b) ever been convicted or cautioned with any criminal offence or has criminal proceedings pending or outstanding? ☐ Yes ☒ No

(c) ever been declared bankrupt or been subject to bankruptcy proceedings? ☐ Yes ☒ No

Claims history - Including uninsured loss

In connection with this or any other property insurance, have you or any family permanently residing with you made a claim in the last 5 years? ☐ Yes ☒ No

Years Claims Free

How many years have you and any family permanently residing with you been claim free on this or any other property insurance?

**Exit** **Next**

You must enter the date the endorsement is to apply from and go through the 5 tabs and make your amendments to the policy details. Once you have made your amendments click quote at the end.

FWCL:Altitude - Windows Internet Explorer

http://www.dolmen.ie/quote/refer/quoteRefer.aspx

## DOLMEN INSURANCE BROKERS

Home | Quote | Risks | Task Manager | Renewal | Reports | Accounts | Site Support | Info | Contact Us | Sign Out

### Quote Refer

 Refer Quote

Quote Reference: DOMC/0048899/2012

Your statement of fact / proposal needs to be referred to Dolmen Insurance Brokers Ltd for assessment for the reasons shown below:

Age of Building  
Dormer  
Fixed glass refer  
All endorsements have to be authorised by an underwriter

Before referring to an Underwriter, please add your comments in the box below

If you would like to discuss this referral please call 00 353 1 8022375 to speak to an Underwriter quoting your Quote Reference number in all communications

changed year of build

[Refer to U/W](#) [Refer later](#)

Terms and Conditions: [View](#)

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Please note in the referral box the changes made and refer to U/W

FWCL:Altitude - Windows Internet Explorer

http://www.dolmen.ie/quote/refer/quoteRefer.aspx

## DOLMEN INSURANCE BROKERS

Home | Quote | Risks | Task Manager | Renewal | Reports | Accounts | Site Support | Info | Contact Us | Sign Out

### Risk Summary

 Statistics

Risk No: 00048899  
Insured: MR Joe Bloggs  
Business Address: 1234 Mainstreet, Cork City, Cork  
Correspondence Address: 1234 Mainstreet, Cork City, Cork  
Product / Trade: Home Owners (UKG) / Buildings and Contents  
Agent: Dolmen Insurance Brokers Ltd

Year	Version	Status	Inception	Expiry	Premium (Gross)	PM / AP / BP Paid	Cano / MTU Paid	Claim
2012	000	Quote (Endorsement)	28/12/2012	27/12/2013	€0.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2012	001	Endorsement Pending	28/12/2012	27/12/2013	€477.92	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Total Premium (Gross): €477.92

Terms and Conditions: [View](#)


test test (test!) Logged in under Dolmen Insurance Brokers Ltd on 28th December 2012  
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Powered by: Altitude

Once the amendment has been released by underwriters click on the quote (endorsement) This will re-direct you to the Risk details page.

**Risk Details**

[Edit Risk](#)
[Hold Cover](#)
[Refer to U/W](#)
[Documents](#)
[Administration](#)
[Comments](#)
[Summary](#)

Risk Status:	Quote (Endorsement) / Quote
Risk Number:	40809
Risk Year / Version:	2012 / 002
Period:	28/12/2012 to 27/12/2013
Insured:	MR Joe Bloggs
Business Address:	1234 Mainstreet, Cork City, Cork
Correspondence Address:	1234 Mainstreet, Cork City, Cork
Product / Trade:	Home Owners (UKG) / Buildings and Contents
Inception / Expiry:	28/12/2012 to 27/12/2013
Agent:	Dolmen Insurance Brokers Ltd
Agent's Phone Number:	01 8672121
Agent's Internal Reference:	
Agent Premium Load:	€0.00
Premium (Gross):	€0.00
Commission:	€0.00
Cover Payment Method:	Not known
PHU/AP/RP Paid:	No
Conc/MTU Paid:	No
Claim:	No
Refer Process:	Yes
Refer as Previous Manual Adjustment:	No
Comments Attached:	0

To hold cover on the endorsement you will need to select **hold cover** . You will need to accept the certificate wording. The date will be greyed out as you entered the date at the beginning when you were endorsing the risk.

Click accept and the endorsement has been held on cover

You can then print off the documents from the documents tab .

## **HOW TO CANCEL AN ENDORSEMENT / AMENDMENT**

Please note that cancelling an endorsement / amendment cancels the whole risk  
If you wish to only cancel the changes made you will need to endorse / amend the policy again back to its original state through the endorsement process


Retrieve the risk and select the latest active version on the **Risk Summary** screen which will take you to the **Risk Details** screen

Place the cursor over the **Administration** button  and then when the sub menu drops down, click on the **Cancel** button 

Complete the **Cancellation Date** field with the cancelled date that the policy is required from


Please note that the cancellation date is approved at our own discretion and may not be back dated if requested

Please complete the **Cancellation Reason** box in order to help us decide an appropriate cancellation date


You will be taken back to the **Risk Details** screen where the cancellation documents can be printed by selecting the **Documents** button  once authorised by the Underwriters.

## HOW TO FIND POLICY DOCUMENTS



On the Risk Details screen select the Documents button  you will then be re-directed to the below screen.



Please note that the Schedule of Insurance, Statement of fact and Policy wording is all under **schedule**. You need to click on the view button  to view the documents.

You can also click on the info tab above for policy booklets.

From here if you wish to add documentation like HIQS quotes ETC for match premiums you can do so by selecting the add document booklet and follow the prompts.



## HOW TO LAPSE(NTU) A POLICY

In risk details you can select NTU (Lapse) request or you can cancel the policy. This is where you can put through a mid term cancellation by selecting Cancel. If you cancel the policy there will be a time on risk charged.

### Cancellations cannot be back dated.



Once the NTU (Lapse) has been selected a request gets sent to underwriters to put it through on the system. If a cancellation comes through underwriters authorise the return to appear on the brokers account.



## **PRINTING STATEMENT OF ACCOUNT**

A copy of your up to date account can be found in the “Reports” section of the site. Click on **Reports** on the main navigation bar at the top of your screen.

When holding your cursor on the “Accounts Report” option you will see **Statement of Account**, click this once.

Select the due date you wish to view up to.

Then select whether you wish to view the statement in either **PDF format** or in **Microsoft Excel** and then click **Submit**.

Should you have any queries with the Accounts system online please call **01 8022300** for further assistance or email [support@dibl.ie](mailto:support@dibl.ie)

## **ISSUING PAYMENT TO DOLMEN INSURANCE BROKERS LTD**


All items that are being paid to Dolmen are electronically advised by you each month. This enables accurate records to be kept as to when monies are sent to and received by Dolmen.

There are 4 main statuses for each payment made by you the agent. These are **Draft, Approved, Query** and **Cleared**.

<b>Draft</b>	Payments are being assembled by you the agent in order to send to Dolmen
<b>Approved</b>	You have finalised all items to be settled and payment has been sent to Dolmen by Cheque
<b>Query</b>	Dolmen has received payment but are querying certain items
<b>Cleared</b>	Dolmen has received payment and agrees with all items settled

When a payment is due to be sent to Dolmen you should use the accounts system online to advise what items are being paid in any one transaction. The instructions below advise how to build up a payment to Dolmen.

1. Click **Accounts** to see the Accounts Balance screen. This screen shows the amount of money owed to Dolmen to date.

2. Click **New Payments** button  to go to the Add/Edit Invoice Payment screen. The items on this screen can be filtered to show all items awaiting payment or up to a certain due date.

3. Select **Cheque** as method of payment being used.

4. If paying by cheque please complete the cheque number in the reference section.


5. The amount to be paid on each transaction defaults to the full amount net of any commission due to you the agent. Tick those items that are to be paid. You can select all items on the displayed page by ticking the box next to Amount.

6. Once all items to be paid are ticked and the amounts being paid are correct then click the **Save** button.


7. Now on the Invoice Payment screen all items that are being proposed to pay are displayed at the bottom of the screen. At this point the status is still **Draft** as this payment can still be edited.

8. Clicking **Edit Payment** button  will take you back to the Add/Edit Invoice Payment screen.

Only those items that were put into the draft will be displayed. All other items can be displayed by selecting **All Invoices**. Now in this screen adjustments can be made to items before finally sending payment. Again click on **Save** button to proceed.

Once you are happy with the items that are being settled click on the **Approve Payment** button 


By doing this you are telling Dolmen that either a Cheque payment is being forwarded. They can then check what items are being paid.

10. The status will now have changed to **Approved**. This means that you the Agent has approved the payment of those displayed items to Dolmen. There is an option to print this for your records by clicking on the **Print** button 

11. Clicking **Summary** button will take you to the Payment summary screen. This shows all previous transactions by your Agency. Various filters are available in order to view previous items. Each of these can be viewed displaying items settled during that transaction.

12. Once the payment is received by Dolmen they will either query the payment or clear it. If a payment is queried an email is sent to your Company email address advising of this. By clicking on the link provided you will be taken to the Invoice Payment Details screen.

You can also access this screen by going to **Accounts** button  on the main navigation bar, then click on the **Payment Summary** button and then the appropriate payment number

Once at this screen click **Comments** button  to see Dolmen's query.

At this point you have the option to leave comments of your own, edit the payment again (if for example an incorrect amount was entered) or approve the payment again.

Once Dolmen have agreed all items paid they will **Clear** the payment. When this is done an email is sent to your Company email address confirming receipt.

## **ACCOUNTS – CHEQUES AND EFT DETAILS**

### **CHEQUES**

ALL CHEQUES ARE TO BE MADE PAYABLE TO DOLMEN INSURANCE BROKERS LTD AND SENT TO:

Dolmen Insurance Brokers Ltd  
37-44 Butterly Business Park  
Artane  
Dublin 5

### **EFT**

For bank details please contact:  
Linda Byrne – Accounts  
01 8022328 – Direct Dial

**\*\*Important note\*\***

Please forward on Remittances for all cheque and EFT payments by post or email –  
[finance@dibl.ie](mailto:finance@dibl.ie)

## **Procedures for reporting claims to DIBL:**

### **DOLMEN AXA & DOLMEN UKG POLICIES**

- We ask that obtain the following information:
  - Clients name, address and policy number
  - The incident date and time
  - The circumstances of the incident.
  - Contact name and number for the Insured or a Representative that will be looking after the claim on there behalf.
- Please contact our office on 01 8022340 and listen to the recorded options for each different Insurer – i.e. UKG / AXA / Contessa
- You will then be transferred to the relevant claims department to report your clients claim.