Managing Referrals

You have been notified of a referral…. Now what?

You can access your referrals several different ways:

By selecting the '**Ref/Cert Number**' hyperlink for a referred shipment included in the list titled "**Referrals, Change & Cancellation Requests, Requests for Quote**" on the **Status** screen immediately following login to the system.

By selecting the '**Referred/RFQ Submitted' and/or 'Sanction Referred**' checkboxes for the status field on **the Shipment Query** screen, clicking [**Search**] and then selecting a shipment to review from the search results.

On the Extranet: select **Shipment** via the main menu.

On the Client side: Select **Shipment** > **Query** via the main menu

⚠ Any customizations that are defined in the policy's **Shipment Screen Customization** screen will apply to the **Shipment** screen whether you access the shipment via the extranet or the assured portal. You see the same screen as your assureds do except where your security rights differ.

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Processing Referrals

Review the Details

- Review the referral reason(s) displayed in the **Referrals** panel near the top of the screen
- Review the shipment's details
- If the shipment is uninsurable, skip to the last step below to immediately action the referral by rejecting it.

Click [**Referral in Process**]

- Clicking [**Referral in Process**] is optional but recommended. Click [**Referral in Process**] so the system will:
  - Update the shipment's status to 'Referral In Process'
  - Inform your colleagues and the user who submitted the referral, the referral is being reviewed
  - Stop sending any referral escalation email notifications if configured accordingly

Manage the Shipment

- Click [**Manage Shipment**] to make updates to the shipment.
- Always be sure to verify that:
  - ✓ Desired premium amounts and/or rates are populated and correct
  - ✓ Desired additional charges and/or rates are populated and correct
  - ✓ Desired insuring and special conditions are populated and correct

Save or Re-calculate or Verify Coverage

- Click [**Save**] to commit any updates you make. System will not verify coverage according to the policy's setup.
- Click [**Recalculate**] if you modified premiums or rates. System recalculates all amounts based on the latest premiums and rates specified. Select [**Save**] to commit changes.
- Click [**Verify Coverage**] if you made changes to shipment information and want system to re-verify coverage. This will overwrite any manual changes you made to shipment premiums, additional charges and rates.

Action the Referral

- To complete the process you must either accept the referral, reject the referral or issue a quote
- Provide an acceptance reason, a rejection reason or additional quote comments
- Click [**Proceed**] to update the shipment's status and notify your assured (via email) that the referral has either been accepted or rejected or that a quote has been issued

For more detailed instructions on **referral management**, **compliance referral management** or **managing quotes**, refer to the User Guide.

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