

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.

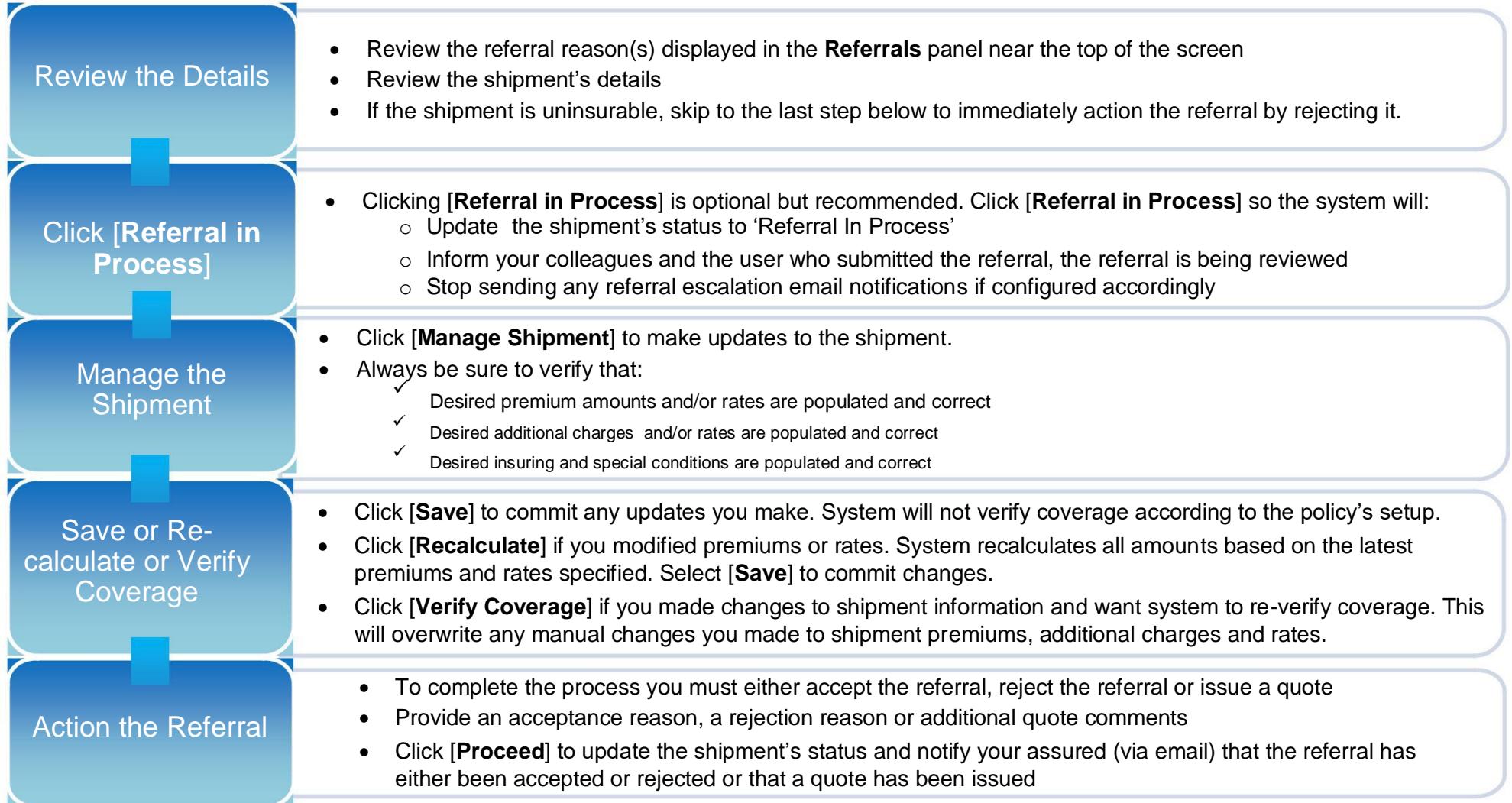
On the Extranet: select **Shipment** via the main menu.

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.

Processing Referrals



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