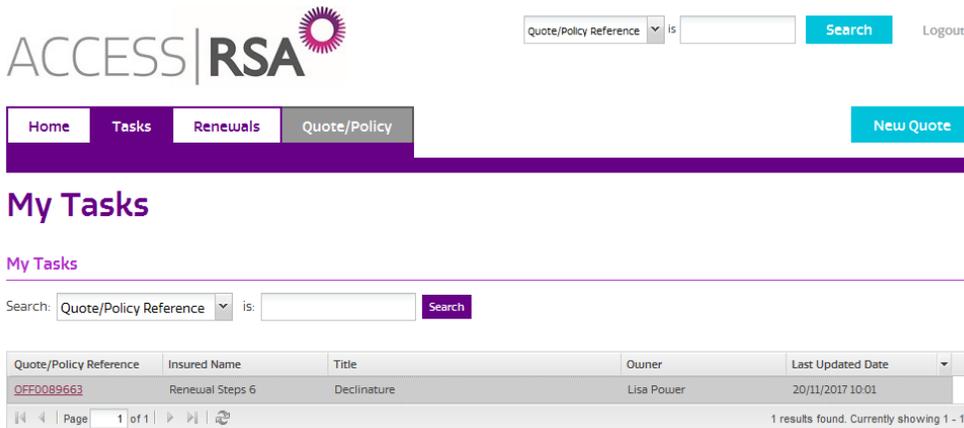


How do I know if I have a new task that needs attention?

Once a task is allocated to you it will be visible in the **Tasks** tab (as below). You should also receive an email for tasks relating to any changes or queries you have raised.



Quote/Policy Reference	Insured Name	Title	Owner	Last Updated Date
OFFD089663	Renewal Steps 6	Declinature	Lisa Power	20/11/2017 10:01

Click into the **Tasks** tab at the top of the page and a list of outstanding tasks for your office will be available to you. Click on the policy number to access that policy. You will be redirected to the **Premium** page of that policy and you will see details of the task.

Please note we recognise that there may be a small amount of tasks that remain open on your tasks list even after actioned. These will not affect the policy and will be removed in due course.

How do I submit a query without making changes to the policy?

If you have a query in relation to a policy you can submit this to RSA using the "Manual Referral" option. This is located at the bottom of the **Premium** page within each policy.



Enter your query and click "Perform Manual Referral".

How do I make changes to a renewal?

Click into [RNL](#) on the transactions page, make any changes on the policy pages and an **Underwriter Review** page will appear. Select "Refer to RSA" to request approval from RSA. Once changes have been approved by RSA, you must bind the policy manually if you wish

to proceed with the renewal. Note that **policies will not auto renew when changes have been made.**

Changes to renewals should not be made through MTA.

	Type	Effective Date	Transact Premium Levy) (€)
  	<u>RNL</u>	21/12/2017	

How do I know if a policy will renew/lapse automatically by the system?

The system will auto-renew a policy 7 days after the renewal date **where no changes have been made** to that renewal since terms were made available.

Where you have made changes to a renewal and it has not been manually committed it will auto-lapse 30 days after the renewal date.

We recommend that you manually commit policies once renewal instruction is received.

A list of current renewals, recently renewed policies, and recently auto-lapsed policies can be found in your weekly summary email.

How do I renew a policy if it does not renew automatically by the system?

To manually renew a policy, click "next" at the bottom of the **Premium** page.

On the subsequent page confirm the policy holder's contact details. Click next at the bottom of the page to go to "Policy Issue". Confirm the payment type and click "Request to Bind" at the bottom of the page. Following this no further changes can be made except by MTA.

Payment Method

Payment Type Credit Account

How do I lapse a policy?

Once renewal terms are available there is an option to lapse the policy. If the insured does not wish to proceed with renewal click the **L** button located on the **Transactions** page to lapse the renewal.

If the policy was lapsed in error it can be reinstated using the **R** icon which appears in the same place.

How do I cancel a policy?

If the lapse option is no longer available and the **L** button has disappeared the policy must then be cancelled. This can be done by choosing "Cancel" from the "Transaction Type" drop down menu on the **Transactions** page.

The renewal must be committed before it can be cancelled. No cancellation fee applies.

How do I set up as a user on the system?

If you have any new users in your office you can contact the RSA Online Services team on +353 1 299 5200 and we will set you up with a log in.

This number can also be used for any Access RSA or Benchmark queries.

How do I notify a claim?

To notify a claim on your Access RSA policy please use the contact details below:

Property claim: +353 1 290 1818
Liability claim: +353 1 903 9706
Benchmark claim: +353 1 261 1422

If the date of loss relates to a date where the Benchmark policy was still active, please use the Benchmark claims notification number.

I am locked out of my account. What should I do?

If you have entered your password incorrectly 3 times, you will automatically be locked out for 20 minutes. After this time you will be able to log in again.

If you have not used your account in the past 60 days your user login will expire. Please contact the RSA Online Services team on +353 1 299 5200 to have it set up again.

My password won't work and the 'forgot password' option is not sending me a new password.

If you don't receive an email to reset your password after going through the "forgotten password" process, firstly check your junk email to make sure it has not been filtered here.

If you did not receive any email with your new password for Access RSA, close down your browser and open a new session. Before entering any of your log in details select the 'forgot password' link and follow the steps.