

# User Guide: Renewals & MTAs



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# RENEWALS

## ACCESSING YOUR RENEWALS



Quote/Policy Reference is  [Search](#) [Logout](#)

- Home
- Tasks
- Renewals**
- Quote/Policy

[New Quote](#)

### Renewal Summary

🔍 Outstanding/Un-actioned Renewals:

○ Renewal Start Date:  Date Range From:  To:   
Renewal Status:  Terms Available, Referred Product:  All Products [Search](#)

Please click into the link on the policy number to view your renewal. You can print the renewal terms from here.  
Please be aware that if there is an open task for any policy in 'Referred' status and we may need a response from you to finalise the renewal terms.

Quote/Policy Reference	Insured Name	Renewal Date	Renewal Status	Product	Premium (Incl of Levy)
<a href="#">OFF0071520</a>	Lakeview Accounts & Co.	10/12/2016	Referred to RSA	Office	N/A
<a href="#">POC0071524</a>	Cranley Properties Ltd.	10/12/2016	Terms Available	Property Owners	€6,588.36
<a href="#">SHO0071522</a>	Complete Solutions Ltd.	10/12/2016	Terms Available	Shop	€2,050.38

Page 1 of 1 | 3 results found. Currently showing 1 - 3.

[Export To Excel](#)

When you log in to Access RSA, click on the “Renewals” tab on the navigation bar to view a list of your available renewals. Renewals will be visible 86 days before the renewal date and will become available to action from 49 days prior to the renewal date.

You can filter renewals based on date, status and product using the options at the top of the page.

To view the renewal terms, click on the policy reference number in the leftmost column.

### Premium

InForce: Renew-TermsAvailable

[Renewals Documents](#)

Required fields are marked by an asterisk \*

Total Premium Details
Premium Excluding Levy (€) 1.324.93
Premium Including Levy (€) 1.391.18

## RENEWAL DOCUMENTS

On the premium page, you will find the finalised renewal documents in pdf format. To download full renewal terms click the purple “Renewal Documents” button. The policy booklet should also be attached when sending these to the insured.

# RENEWALS

## REFERRING TO AN UNDERWRITER

If you have a query in relation to the renewal you can refer it to an underwriter. To do this click "Manual Referral" at the bottom of the premium page. Enter your query and click "Perform Manual Referral".

RSA Bravo

### Manual Referral

Required fields are marked by an asterisk \*

Reason for Manual Referral\*

Cancel Manual Referral Perform Manual Referral

feedback

Previous Manual Referral Next

## BINDING A RENEWAL

**Material Facts**

11. Are there any material facts that you wish to bring to the Insurer's attention? No

**Payment Method**

Payment Type Credit Account

Previous Request to Bind

To bind a renewal, click "next" on the bottom of the premium page. On the subsequent page confirm that policy holder's contact details. Click next at the bottom of the page again to go to "Policy Issue". Confirm the payment type and click "Request to Bind" at the bottom of the page.

If not manually bound they will auto-commit 7 days after the renewal date and no further changes can be made after this except by MTA.

## MAKING CHANGES TO YOUR RENEWAL

Changes can be made to a renewal by clicking the relevant section under the “Transaction Navigation” menu on the left hand side of the premium page. You can then make amendments on the page.

Transaction Navigation	
Eligibility	
General Policy Information	
Premises Details	
Property Damage Sums Insured	
Premises Summary	
Policy Level Covers	
Premium	
Policy Holder Contact Details	
Policy Issue	

B) A NEW DEFINITION ...

**Ter6 - War and Terrorism Exclusion**

WHEREVER THE NORTHERN IRELAND EXCLUSION OR ANY TERRORISM EXCLUSION OR ANY OTHER WAR AND TERRORISM EXCLUSION APPEARS IN THE POLICY THEY ARE DELETED AND THE FOLLOWING ADDED

THIS POLICY EXCLUDES LOSS ...

**CLEG01 - Commercial Legal Expenses**

COMMERCIAL LEGAL PROTECTION  
LIMIT OF INDEMNITY €400000 ANY ONE EVENT  
THE COMMERCIAL LEGAL PROTECTION INSURANCE IS UNDERWRITTEN BY DAS LEGAL EXPENSES COMPANY LIMITED  
REFER TO MASTER POLICY TS55 71 ...

[Previous](#) [Manual Referral](#) [Next](#)

Transaction Navigation	
Eligibility	
General Policy Information	
Premises Details	
Property Damage Sums Insured	
Premises Summary	
Policy Level Covers	
Underwriting Review	

Should your changes activate a referral trigger “Underwriting Review” will appear under transaction navigation. Click next at the bottom of each page until you reach the underwriting referral page.

Clicking the “Refer to Underwriter” button in the bottom right corner to send your change to the RSA underwriting team for review. You will receive a notification by email once your referral has a response (unless you have unsubscribed for this) and a new item will appear in your tasks.

### Underwriting Review

InForce: Renew-TermsAvailable

#### Refer Details

Is there any additional information you would like to bring the underwriter's attention prior to referral?

#### Reason For Refer

#### Rating Messages

▲ Policy requires underwriter review before transaction can be processed

[Previous](#)

[Refer to Underwriters](#)

After renewal changes have been approved, in order to revert to the original renewal terms offered you must undo any changes made.

## BEGINNING AN MTA

To make changes to a policy select "Mid Term Adjustment" from the drop down list on the Transactions page and click "Go". A new line will appear on the list of transactions for the MTA. Click on this to complete the MTA.

### Transactions

Insured Name: Robertson Co.

Quote/Policy Reference: OFF0071525

Effective Date: 24/11/2015    Expiration Date: 23/11/2016

Original Inception Date: 24/11/2015

Policy Status: InForce    Agency:

Payment Type: CreditAccount

Transaction Type:

Mid Term Adjustme   
(Select Type)  
Mid Term Adjustment  
Cancel

	Type	Effective Date	Transaction Premium (Incl Levy) (€)	Transaction Premium Commission (€)	Transaction Premium Levy(€)	Status
	NB	24/11/2015	441.80	73.63	21.04	Committed

## COMPLETING YOUR MTA

Select the date the MTA should become effective from and click "Ok"

This will then bring you to the General Policy Information page where you can make changes.

Access RSA.

### Mid-Term Adjustment

Required fields are marked by an asterisk \*

Effective Date\* 28/11/2016

OK Cancel feedback



MAKING THINGS  
BETTER, TOGETHER

## CONTACT US

**RSA Online Services Team**

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