

Uploading Documents for referrals via Sunrise and c.change:

Business Pack (BPK), Private Motor (MPA), Commercial Motor (MVA), Home & Contents (HPK), Farm (FAR)

Instructions and Frequently Asked Questions (FAQs)

QBE Insurance

March 2023

Frequently Asked Questions

This document relates to the uploading of documents for referrals which are transacted via Sunrise and c.change.

Which product can I upload documents for?

Document upload is available for Business Pack (BPK), Commercial Motor (MPA), Private Motor (MVA), Home & Contents (HPK), and Farm (FAR).

Which transaction types are included?

Previously, the functionality to upload a document was only available when referring a quote. We have extended this to allow document upload on referrals for the following transaction types:

- Quotes (for Business Package only)
- New business
- Endorsements
- Cancellations
- Renewals.

What types of documents should I upload?

Below are examples of the types of documents you should attach to expediate your request.

Business Package

Referral Reason	Documents/Attachments
Claims experience	Claims history
Survey required Refer due to construction	Survey report
Survey Required Refer Due to Construction	Building valuations Building reports
Survey Required Specified Items Refer Due to Construction	Photos
Specified Items Sums Insured Exceeds Limit	Valuations
Stamp Duty Exempt	Stamp Duty Exemption Certificate
Manual – Matching Terms Transfer	Quotes & policy schedules
Variable Clause noting Interested Party/ Third Party	Contracts, agreements, leases
Refer due to backdate	Proof of sale

Private & Commercial Motor (MPA & MVA)

Referral Reason	Documents/Attachments
No Claim Bonus	Proof of no claim bonus from prior insurer
Claims experience	Claims history on prior insurer letterhead
Driving offences	Print out from relevant authority (eg Dept of Transport)
Stamp Duty Exempt	Stamp Duty Exemption Certificate
Refer due to backdate	Proof of Sale

Home & Contents (HPK)

Referral Reason	Documents/Attachments
Refer due to Claims History	Copy of Claims history on prior insurer letterhead
Stamp Duty Exempt	Copy of any relevant documentation that shows that the insured is stamp duty exempt
Specified Items – Sums Insured Exceed Limits	Copies of relevant valuations
Rewiring/replumbed	Copies of documents showing when risk was last rewired and/or replumbed.
Situation in cyclone/remote area	Copies of documents that support any work that has been done to mitigate cyclone exposure.

Farm (FAR)

Referral Reason	Documents/Attachments
Refer due to construction Refer to year built Refer due to inferior construction Refer due to property & BI um Insured	Survey of the risk inc. images Building valuations Building condition reports Pictures of the item in question
Refer due to claims history Refer due to age of the vehicle	Copy of claims history on prior insurer letterhead Full details of the loss(es) Full details of any remedial actions undertaken by the insured

Some things you need to know

- You can add up to 20 documents for each referral from the referral screen
- There is a two-megabyte (2mb) size limit for each uploaded file
- The maximum size limit for all files is 30 megabytes (30mb) for each referral
- If the document size limits are exceeded, the system will display an error message to advise which limit has been exceeded.
- The uploaded file description is limited to 30 characters and must only include letters, numbers, and spaces
- Documents loaded as part of a referral cannot be removed in subsequent referrals for the same quote
- There is a 50-character limit for the file name. Files names that exceed 50 characters will not be uploaded successfully
- Files names should not contain any spaces or special characters such as an asterisk (*), hash tag (#), or exclamation mark (!) (**HINT:** Use '**Save As**' to rename the file with no spaces or special characters before attaching).

Helpful hints

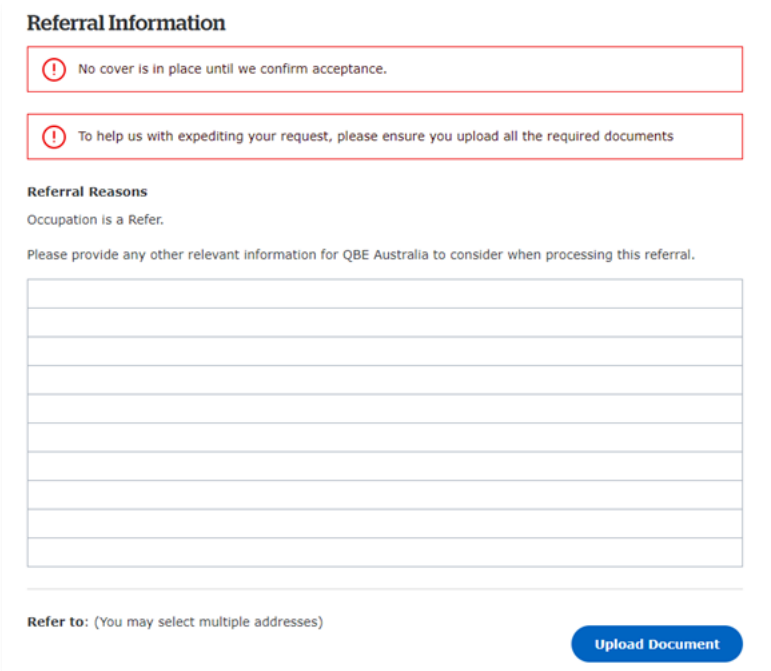
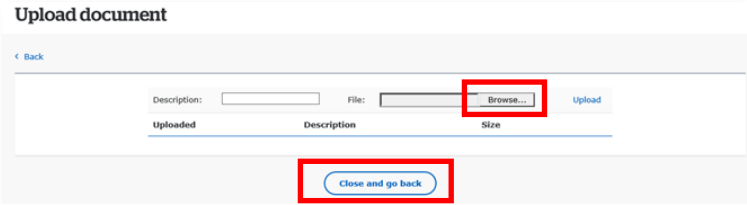
Reduce the file size of your documentation by using any of these options.

- Split a large document into two or more documents before uploading
- Reduce the size of a large document by 'zipping' the file before attaching
- Save any large photo files as a PDF

How do I upload a document?

Business Pack (BPK)

To upload a document for BPK.

DESCRIPTION	SCREEN IMAGE
<p>From the Referral Information screen.</p> <ul style="list-style-type: none">Select Upload Document <p><i>The Upload Document Screen will display.</i></p>	
<ul style="list-style-type: none">Select Browse for the document to uploadLocate the documentAdd a Description of the documentClick Upload <p>REPEAT THE PROCESS IF THERE ARE MULTIPLE DOCUMENTS TO UPLOAD.</p> <p>When all documents have been uploaded.</p> <ul style="list-style-type: none">Click Close and go back	

Commercial Motor (MPA) and Private Motor (MVA)

To upload a document via Sunrise
and c.change for MPA/ MVA

DESCRIPTION

SCREEN IMAGE

Navigate to the Referral
Information screen and

- click on the **Upload Document** button at the bottom of the screen

COMMERCIAL MOTOR - New Business Inception Date: 28/07/2022 Effective Date: 28/07/2022 Expiry Date: 28/07/2023

Referral Information

No cover is in place until we confirm acceptance.
To help us with expediting your request, please ensure you upload all the required documents
Referral Reasons:
Individual Claim greater than \$30,000 on policy in the last 2 years.

Please provide any other relevant information for QBE Australia to consider when processing this referral.

Refer to: (You may select multiple addresses by holding down the Ctrl-Key).
jacqui.viterale@qbe.com Upload Document

Back Clear Window Refer

- Select **Choose File**
- Locate the file in the Directory
- Add the **Description** of the document
- Click **Upload**

REPEAT THE PROCESS IF THERE ARE
MULTIPLE DOCUMENTS TO UPLOAD.

When all documents have been
uploaded.

- Click **Close**

Upload Document

Description: File: Choose File No file chosen Upload

Uploaded	Description	Size

Close 8.03.0-n1

Home & Contents (HPK) and Farm (FAR)

1. Navigate to the Referral Information screen and click on **Upload Document** at the bottom of the screen

Referral Information

No cover is in place until we confirm acceptance.
To help us with expediting your request, please ensure you upload all the required documents

Referral Reasons:
Specified Valuables Sum Insured too High. Please refer direct.

Please provide any other relevant information for QBE Australia to consider when processing this referral.

Copies of relevant valuations attached

Refer to: (You may select multiple addresses by holding down the Ctrl-Key)

Upload Document

2. **Browse** for the documents you want to upload, add a description of the document then click **upload**.

Upload Document

Description: Valuation File: Browse... Upload

Uploaded	Description	Size

Close

8.07.0-n1

3. Repeat the process if there are multiple documents to upload.
4. Click **Close and go back** when all documents have been uploaded.