

# ETASS – Re

Broker (Contract)



General Insurance Council

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## 1. Introduction to Broker Actionables

The Broker Actionable module allows brokers to manage different types of bucket items including:

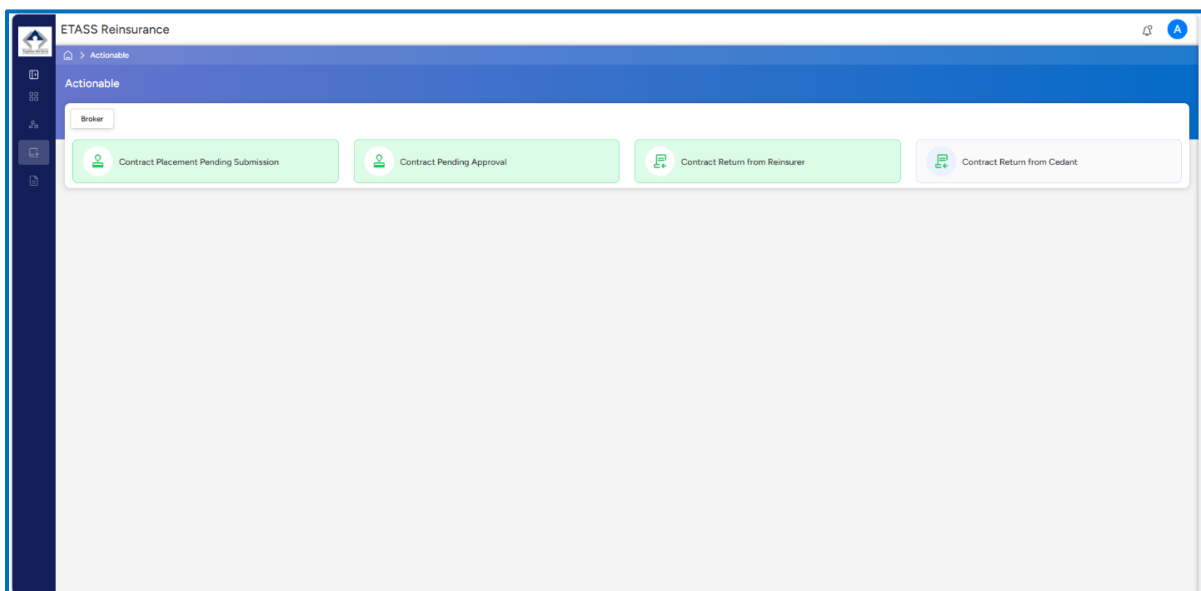
- Contract placement pending submission
- Contract pending for approval
- Contract returned from reinsurer
- Contract returned from cedant

When an action item arrives in a bucket, it will be highlighted with a green background to draw attention.

### Getting Started

To access the Broker Actionable module:

1. Click on **Menu**
2. Select **Actionable**



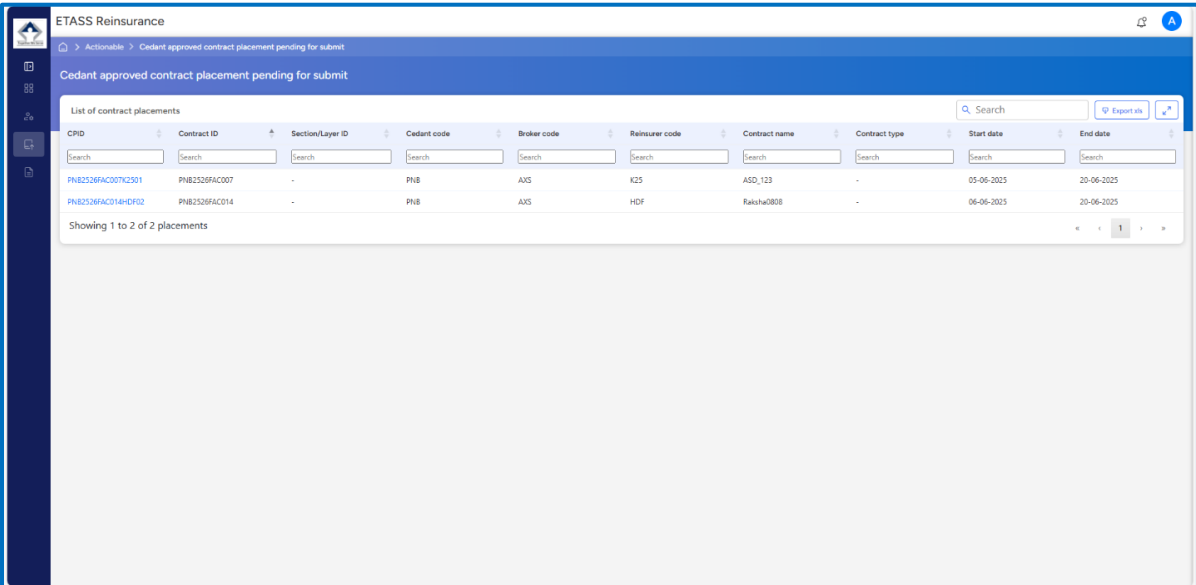
## 2. Actionable I: Contract Placement Pending Submission

### 2.1. Overview

This bucket contains contract placements that have been approved by the cedant and are pending submission by the broker to the reinsurer.

### 2.2. Accessing the Module

1. Click on **Menu**
2. Select **Actionable**
3. Click on "**Contract placement pending submission**" bucket item



The screenshot displays the ETASS Reinsurance system interface. The breadcrumb navigation shows 'Actionable > Cedant approved contract placement pending for submit'. The main heading is 'Cedant approved contract placement pending for submit'. Below this is a table titled 'List of contract placements' with search filters for each column and an 'Export xls' button. The table contains two rows of data.

CPID	Contract ID	Section/Layer ID	Cedant code	Broker code	Reinsurer code	Contract name	Contract type	Start date	End date
PNB2526FAC007K2501	PNB2526FAC007	-	PNB	AXS	K25	ASD_123	-	05-06-2025	20-06-2025
PNB2526FAC014HDF02	PNB2526FAC014	-	PNB	AXS	HDF	Raisha0808	-	06-06-2025	20-06-2025

Showing 1 to 2 of 2 placements

### 2.3. Features Available

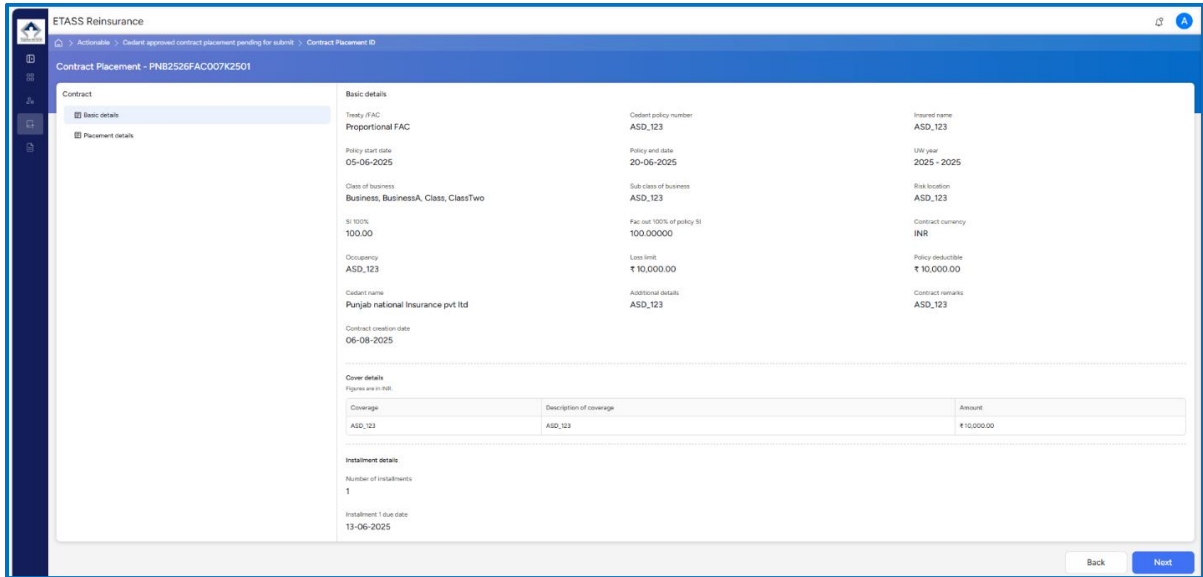
#### List Management

- **Search Functionality:** Use the search box to find specific contract placements by entering relevant data
- **Column Filters:** Search for contract placements by entering data in specific column filters
- **Export Options:** Download the list data by clicking "**Export xls**"
- **Pagination:** Navigate through pages using page numbers or previous/next icons

- **Sorting:** Sort data in ascending or descending order by clicking column names multiple times

## 2.4. Viewing Contract Details

Click on any **Contract placement ID** to view detailed information.



## 2.5. Navigation Options

On the placement details page:

- **Next Button:** Navigate to Section/Layer details (Proportional/Non-Proportional) or Placement Details (FAC)
- **Back Button:** Return to the contract placement ID list
- **Direct Navigation:** Click directly on Section/Layer names or Placement Details tabs

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Contract placement ID - NIA2526SURO00S02PNB01

Contract

section02 - NIA2526SURO00S02

Section Details

Section Name: section02  
 Maximum Treaty Capacity: ₹ 43.00  
 SOA Cycle: Half Yearly  
 Number of Days for Settlement: 43  
 Section Remark:

Cedant Section Reference Number: 6328683426  
 Class of Business: Business  
 Max Days to Share SOA: 34  
 Claim Notification Limit (amount): ₹ 345,678.00

Estimated Premium: ₹ 876,543.00  
 Contract Currency: INR  
 Claim Recovery Limit (amount): ₹ 3,245,678.00

Placement Details

Placement 1

Broker Name	Broker Share %	Total %
IFKO Insurance Company	50.00000 %	50.00000 %

Buttons: Raise a query, Back, Submit

ETASS Reinsurance

Contract placement ID - NIA2526CXLO48S02K2501

Contract

Layer222 - NIA2526CXLO48S02

Layer Details

Layer name: Layer222  
 Cedant Layer Reference Number: 4563

Cover Details

Figures are in -

Class of Business	Description of COB	EONPI	Deductible	Coverage	No. of Reinstatements
Business New	mrr	\$5,00000	\$5,00000	\$5.00	\$5

Installment Details

Number of Installments: 2

Installment 1 Due Date: 11/07/2025  
 Installment 2 Due Date: 12/07/2025

Placement Details

Placement 1

Broker Name	Broker Share %	Total %
IFKO Insurance Company	100.00000 %	100.00000 %

Buttons: Raise a query, Back, Submit

ETASS Reinsurance

Contract Placement - PNB2526FAC007K2501

Contract

Placement 1

Broker Name	Broker Share %	Total %
Axix Insurance pvt ltd	60.00000 %	60.00000 %

Hide details

Source Broker Name	Source Broker Share	Placement Broker Name	Placement Broker Share	Reinsurer Name	Reinsurer Share	Status	Actions
ICICI Lombard	10%	-	-	KIYANSURANCE	30.00000 %	Pending broker submission	View Details

Buttons: Raise a query, Back, Submit

## Available Actions

### Submit Contract

- Click "**Submit**" button to send contract placement details to reinsurer for approval
- Available on Section/Layer details or Placement Details pages

## View Details

- Click **"Show details"** / **"Hide details"** to toggle placement grid visibility
- Click **"View details"** to see complete information for cedant, main broker, source broker, placement broker, and reinsurer

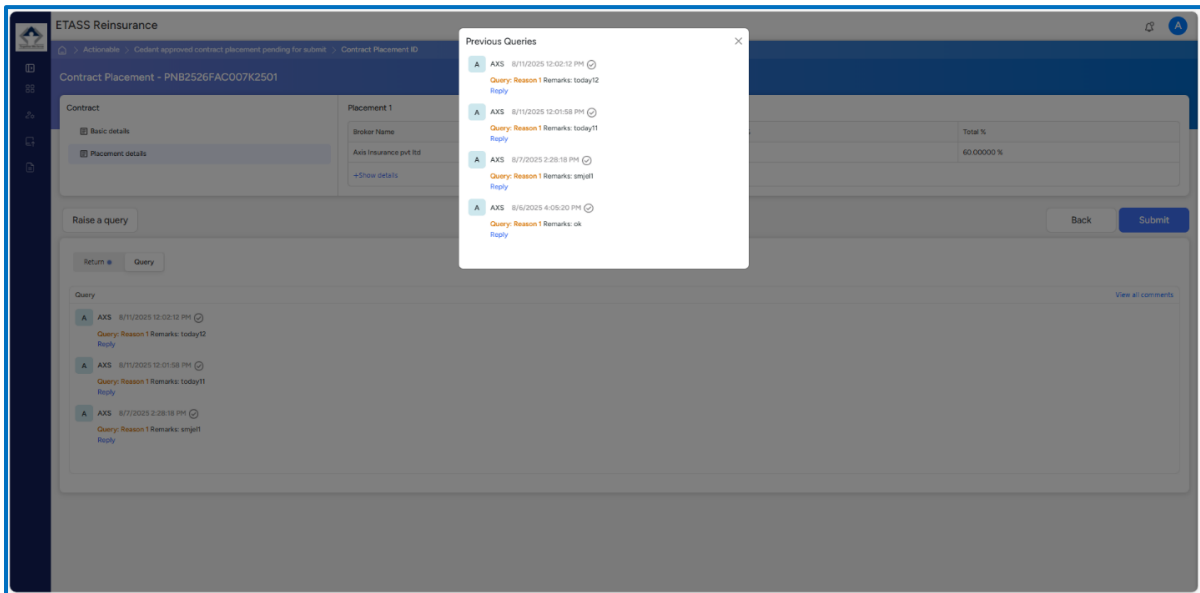
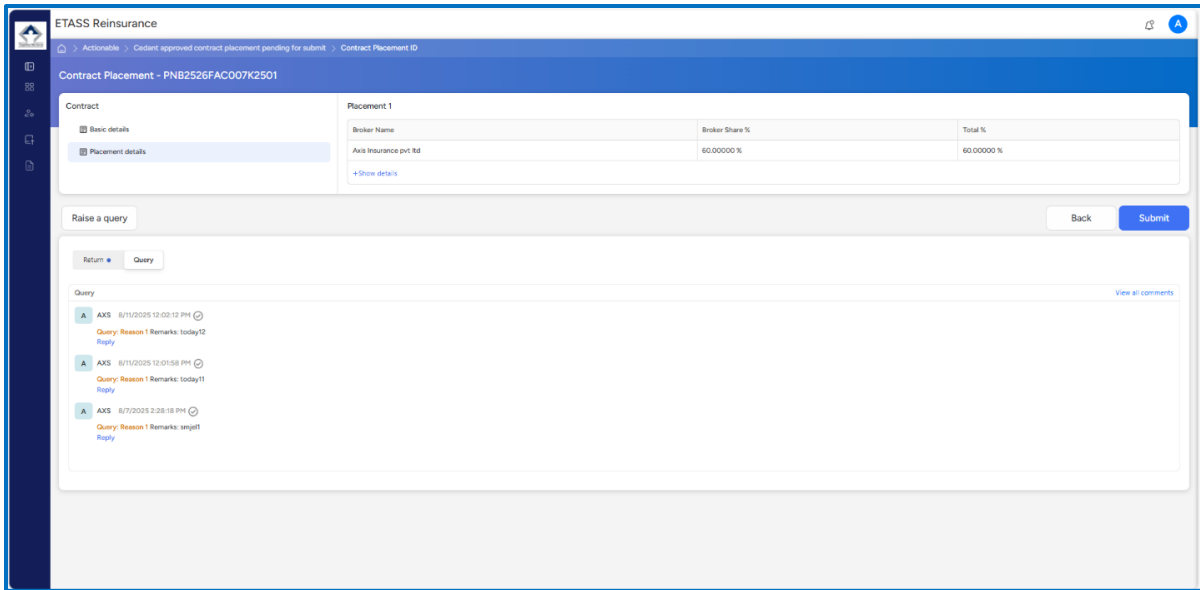
View Details			
Cedant name Punjab national Insurance pvt ltd	Cedant Policy Number ASD_123	Under writing year 2025 - 2025	Contract ID PNB2526FAC007
Broker code AXS	Broker name Axis Insurance pvt ltd	Broker share % 60.00000	
<b>Source broker</b>			
Source broker name ICICI Lombard	Source broker code ICL	Source broker share % 10.00000	Source broker reference number -
Source broker brokerage % -			
<b>Placement Broker</b>			
Placement broker name -	Placement broker code -	Placement broker share % -	Placement broker reference number -
Placement broker brokerage % -			
<b>Reinsurer Details</b>			
Reinsurer code K25	Reinsurer name KIYAINSURANCE	IRDAI registration number IRDAI/2026/CHK25	Reinsurer country name India
Reinsurer share 30.00000	Reinsurer reference number -	Broker reference number axis123	Brokerage % 10.00000
Brokerage amount ₹ 10,000.00	FAC premium (Reinsurer Share) ₹ 10.00	Ceding commission % 10.00000	Ceding commission amount ₹ 10.00
Contract currency INR	Settlement currency INR		
Other details -			
Is this a related party? -			

The screenshot displays the ETASS Reinsurance interface. A 'Raise a query' dialog box is open, allowing users to submit questions or concerns. The dialog includes fields for Contract ID (PNB2526FAC007), Section ID (-), and Placement ID (PNB2526FAC007K2501). It also features a dropdown for 'Query reason' (set to 'Please Select'), a text area for 'Query Description', and a 'Submit' button. The background shows the 'Contract Placement - PNB2526FAC007K2501' page with a 'Raise a query' button and a list of previous queries.

## 2.6. Raise Query

- Click **"Raise a Query"** button to submit questions or concerns about the contract placement to the cedant
- Select query reason from dropdown

- Enter detailed query description
- Click **Submit** to send query



## 2.6.1. Query Management

- View latest 3 queries with replies in the raised query section at the bottom of the page
- Click "**View all comments**" to see complete query history

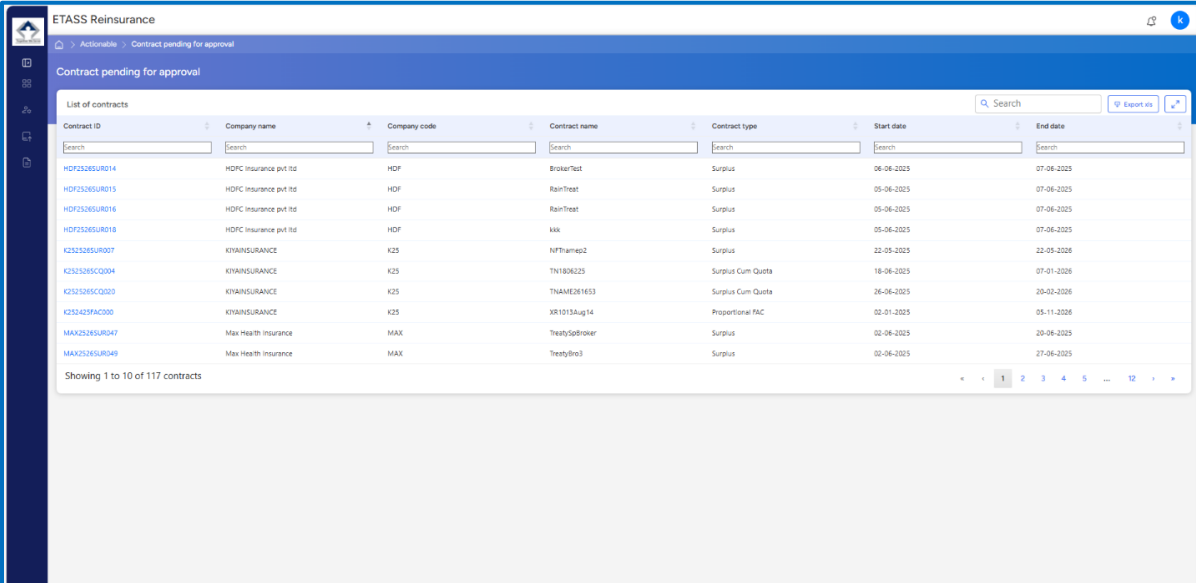
### 3. Actionable II: Contract Pending for Approval

#### 3.1. Overview

This bucket displays contracts where the logged-in broker has been added as the main broker by the cedant and requires approval.

#### 3.2. Accessing the Module

1. Click on **Menu**
2. Select **Actionable**
3. Click on "**Contract pending for approval**" bucket item



ETASS Reinsurance

Contract pending for approval

List of contracts

Contract ID	Company name	Company code	Contract name	Contract type	Start date	End date
HDF23265UR014	HDFC Insurance pvt ltd	HDF	BrokerTest	Surplus	06-06-2025	07-06-2025
HDF23265UR015	HDFC Insurance pvt ltd	HDF	RainTest	Surplus	05-06-2025	07-06-2025
HDF23265UR016	HDFC Insurance pvt ltd	HDF	RainTest	Surplus	05-06-2025	07-06-2025
HDF23265UR018	HDFC Insurance pvt ltd	HDF	kkk	Surplus	05-06-2025	07-06-2025
K2523265UR027	KYAINSURANCE	K25	NFTamep2	Surplus	22-05-2025	22-05-2026
K2523265UR024	KYAINSURANCE	K25	TN1808225	Surplus Cum Quota	18-06-2025	07-01-2026
K2523265UR020	KYAINSURANCE	K25	TNAME261653	Surplus Cum Quota	26-06-2025	20-02-2026
K252429FAC030	KYAINSURANCE	K25	XR1913Aug14	Proportional FAC	02-01-2025	05-11-2026
MAX25246UR047	Max Health Insurance	MAX	TreatySproler	Surplus	02-06-2025	20-06-2025
MAX25246UR049	Max Health Insurance	MAX	TreatyBrc3	Surplus	02-06-2025	27-06-2025

Showing 1 to 10 of 117 contracts

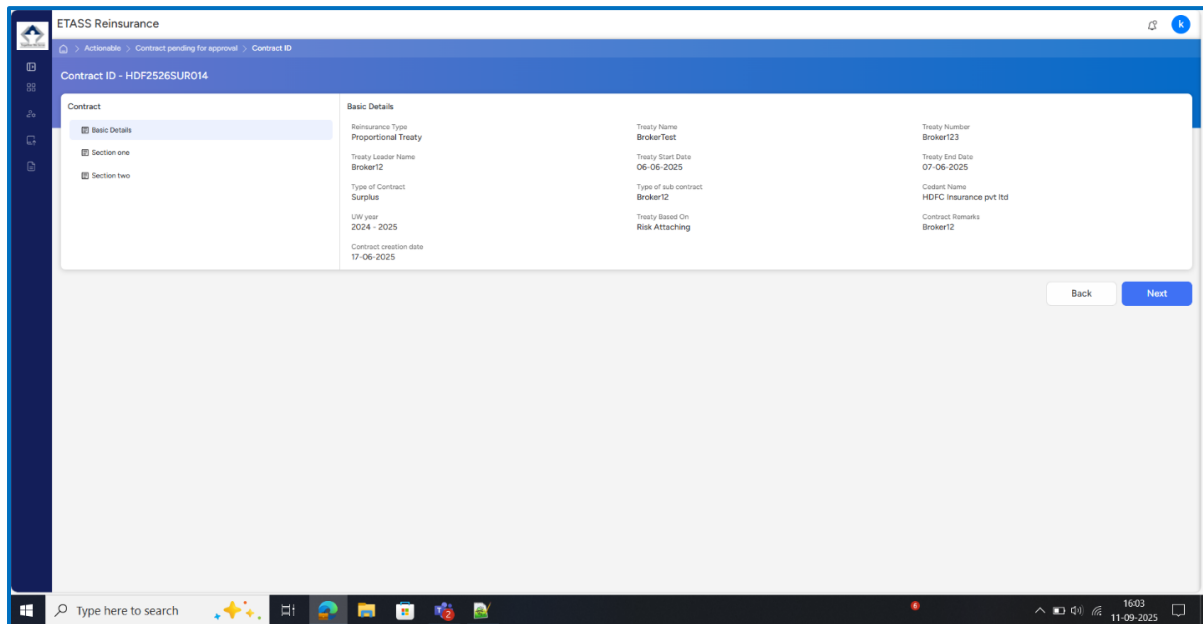
#### 3.3. List Management Features

Like the previous section, this module includes:

- Search functionality with search box and column filters
- Export options (Export xls)
- Pagination controls
- Sorting capabilities

### 3.4. Contract Details View

Click on any **Contract ID** to access detailed contract information.



#### 3.4.1. Navigation and Layout

- **Basic Details** tab with Next/Back navigation
- **Section/Layer details** (for Proportional/Non-Proportional contracts)
- **Placement Details** (for FAC contracts)
- Direct tab navigation available

ETASS Reinsurance

Actionable > Contract pending for approval > Contract ID

Contract ID - K252526SCQ020

Contract: FIRE25351653 - K252526SCQ020501

Section Details

Section Name FIRE25351653	Contract Section Reference Number CRN261224	Estimated Premium ₹ 12,322,214.00
Maximum Treaty Capacity ₹ 22.00	Class of Business Business	Contract Currency INR
SOA Cycle Monthly	Max Days to Share SOA 76	Claim Recovery Limit (amount) ₹ 2.00
Number of Days for Settlement 22	Claim Notification Limit (amount) ₹ 22.00	

Section Remark  
please proceed to next stage ...

Placement Details

Placement 1 + Reinsurer Details

Broker Name	Broker Share %	Total %
IFKO Insurance Company	22.24554 %	22.24554 %

+ Show details

Raise a query Return Confirm

ETASS Reinsurance

Actionable > Contract pending for approval > Contract ID

Contract ID - PNB2526RXL101

Contract: Functional227\_22 - PNB2526RXL101L02

Layer Details

Layer name\*  
Functional227\_22

Contract Layer Reference Number\*  
layerrefnum123

Cover Details  
Figures are in -

Class of Business	Description of COB	EGNPI	Deductible	Coverage	No. of Reinstatements
Business	COBDescription	1234.00000	1234.00000	123.00	2

Installment Details

Number of Installments\*  
1

Installment 1 Due Date\*  
18/07/2025

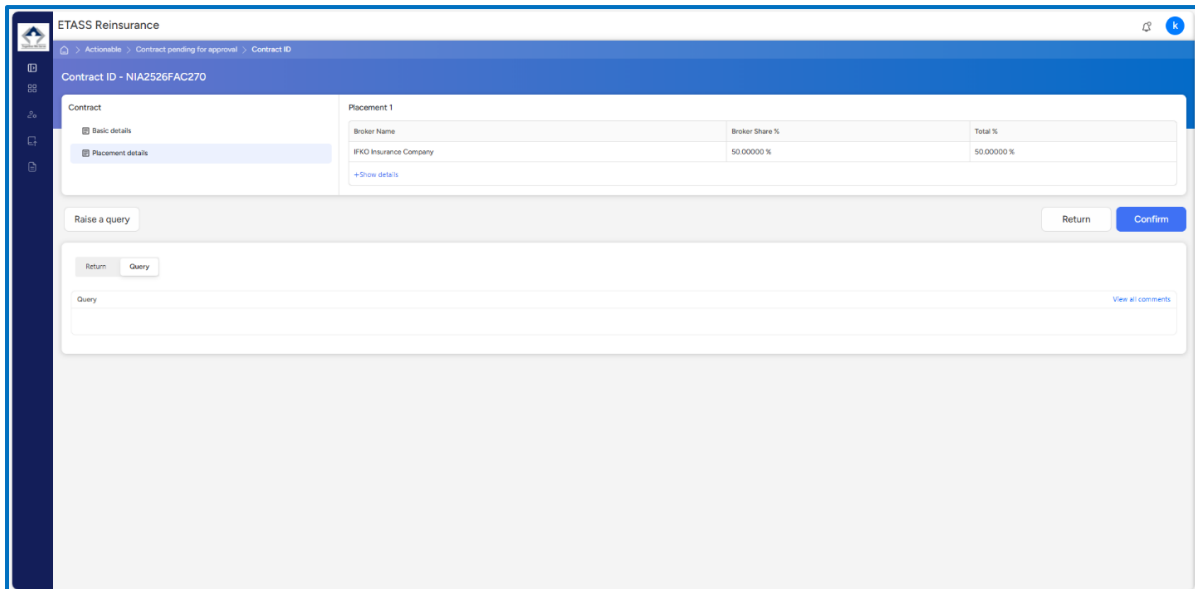
Placement Details

Placement 1

Broker Name	Broker Share %	Total %
IFKO Insurance Company	30.00000 %	30.00000 %

+ Show details

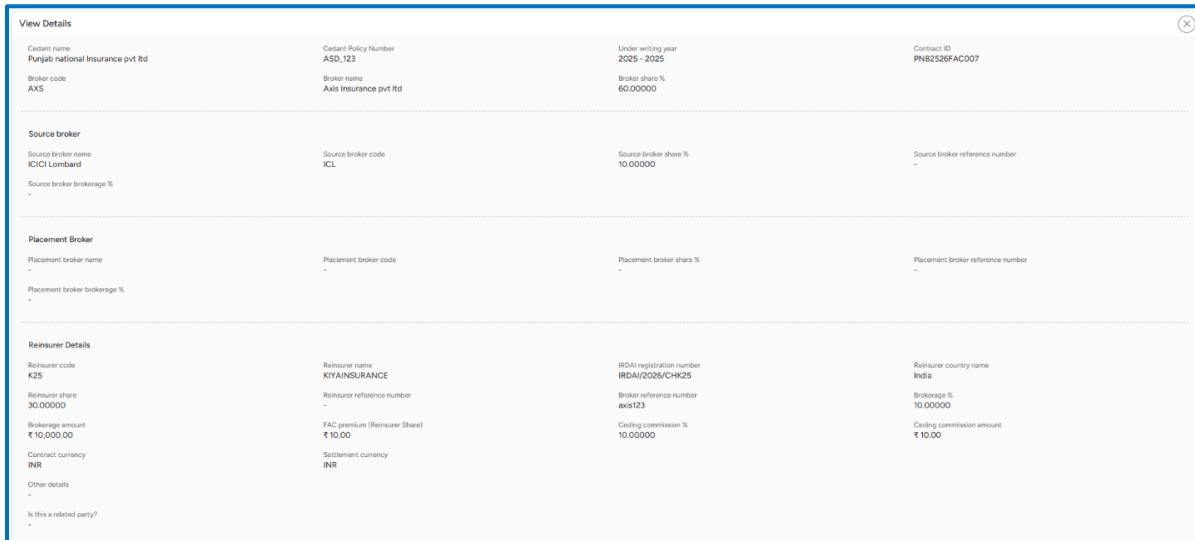
Raise a query Return Confirm



### 3.4.2. Available Actions

#### View and Hide Details

Toggle placement grid visibility and access comprehensive entity details.



#### Contract Actions

### 3.4.3. Raise Query

- Submit queries or concerns to cedant
- Select query reason and provide description
- View query history (latest 3 queries with replies)

ETASS Reinsurance

Contract ID - NIA2526SUR681

Contract

- Basic Details
- SurgRTY
- SurgRTY2

SurgRTY2 - NIA2526SUR681

Section Details

Section Name: SurgRTY2

Maximum Treaty Capacity: ₹ 90.00

SOA Cycle: Half Yearly

Number of Days for Settlement: 90

Section Remark: dfghjk

Placement Details

Placement 1

Broker Name	Broker Share %	Total %
IFKO Insurance Company	50.00000 %	50.00000 %

+ Show details

Estimated Premium: ₹ 9,000.00

Contract Currency: INR

Claim Recovery Limit (amount): ₹ 8,888.00

Raise a query

Return Confirm

Return Query

Query

View all comments

Raise a query

Contract ID	Section ID	Placement ID
NIA2526SUR681	NIA2526SUR681502	-

Query reason: Reason 2

Query Description: Add

Raise to New India Assurance

Submit

SOA Cycle: Half Yearly

Max Days to Share SOA: 90

Contract Currency: INR

Number of Days for Settlement: 90

Claim Notification Limit (amount): ₹ 8,888.00

Claim Recovery Limit (amount): ₹ 8,888.00

Section Remark: dfghjk

Placement Details

Placement 1

Broker Name	Broker Share %	Total %
IFKO Insurance Company	50.00000 %	50.00000 %

+ Show details

Raise a query

Return Confirm

Return Query

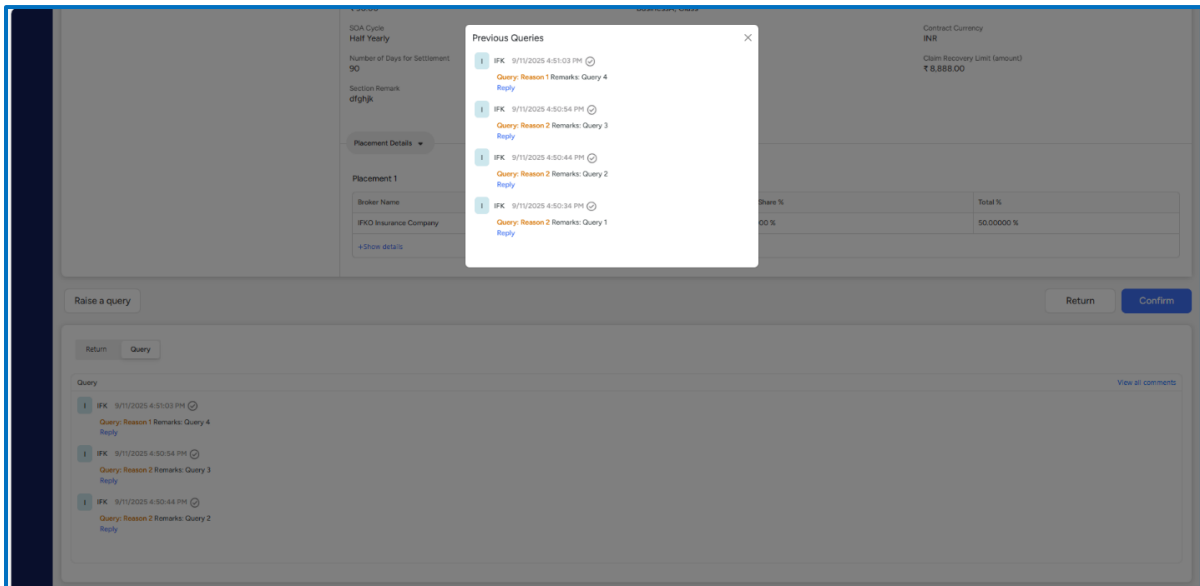
Query

View all comments

1 IFK 8/11/2025 4:51:03 PM [Query: Reason 1 Remarks: Query 4](#) [Reply](#)

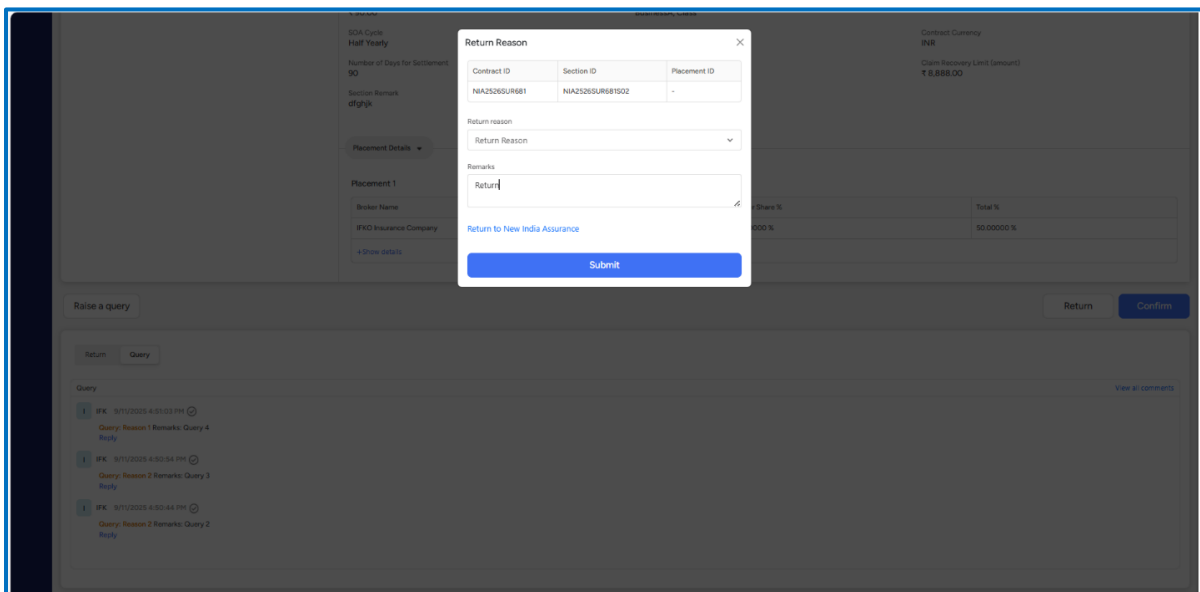
1 IFK 8/11/2025 4:50:54 PM [Query: Reason 2 Remarks: Query 3](#) [Reply](#)

1 IFK 8/11/2025 4:50:44 PM [Query: Reason 2 Remarks: Query 2](#) [Reply](#)



### 3.4.4. Return Contract

- Return contract to cedant with specified reason
- Select return reason and provide description
- View return history (latest 3 return comments with replies)



### 3.4.5. Confirm Contract

- Confirm placement details at section/layer/placement level
- After confirmation, action buttons change to Submit (disabled) and Back
- Enables additional functionality based on contract setup

## Contract Scenarios

## Scenario 1: Cedant Added Only Broker

When cedant initially added only broker details:

- **"+Reinsurer details"** button becomes enabled after broker confirms the contract
- Add Source broker, Placement broker, and reinsurer details
- Validation rules apply for broker relationships and share distributions

The screenshot displays the ETASS Reinsurance system interface for Contract ID - HDF2526SUR031. The interface is divided into two main sections: 'Section Details' and 'Placement Details'.

**Section Details:**

Field	Value
Section Name	TreatyNameOne_1
Maximum Treaty Capacity	₹ 100.00
SCA Cycle	Annually
Number of Days for Settlement	100
Section Remarks	TreatyName
Cedant Section Reference Number	TreatyName12121
Class of Business	Business
Rate Date to Share SCA	100
Claim Notification Limit (Amount)	₹ 1,000.00
Estimated Premium	₹ 1,000.00
Contract Currency	INR
Claim Recovery Limit (Amount)	₹ 100.00

**Placement Details:**

Placement 1

Broker Name	Broker Share %	Total %
Axis Insurance Pvt Ltd	40.00000 %	40.00000 %

Placement 2

Broker Name	Broker Share %	Total %
Axis Insurance Pvt Ltd	60.00000 %	60.00000 %

Note: Kindly ensure to add details under "Add details" before proceeding to submit.

## Scenario 2: Cedant Added Broker with Reinsurer

When cedant added broker along with reinsurer:

- Note displays: "Kindly ensure to add details under 'Add details' before proceeding to submit"
- **"Add details"** button enabled in action column after confirmation
- Add Source broker, Placement broker details and broker reference details

## Business Rules

### Broker Relationship Constraints:

- Source broker and Placement broker must differ from main broker
- Source broker and Placement broker must be different from each other
- Source broker share cannot exceed main broker share
- Placement broker share cannot exceed Source broker share

## Detail Management

## Form Actions:

- **Cancel:** Return to previous page
- **Save:** Save all added details

### Submission Requirements:

- Submit button enables only when all placement details are complete
- Button remains disabled until share distributions balance correctly

### Multi-Section Navigation

For contracts with multiple sections/layers:

- Navigate through each section sequentially
- Submit each section individually
- Final section shows Back and Close buttons
- Back navigates to previous section, Close returns to contract list

## 4. Actionable III: Contract Placement Return from Reinsurer

### 4.1. Overview

This bucket contains contract placements that have been returned by the reinsurer to the broker for revision or additional information.

### 4.2. Accessing the Module

1. Click on **Menu**
2. Select **Actionable**
3. Click on "**Contract placement return from reinsurer**" bucket item

The screenshot displays the ETASS Reinsurance application interface. The top navigation bar shows the breadcrumb path: Actionable > Contract pending for approval > Contract ID. The main content area is titled "Contract ID - HDF2526SUR031" and is divided into two sections: "Section Details" and "Placement Details".

**Section Details:**

Section Name	TreatyNameTwo,2	Contract Section Reference Number	TreatyName12121	Estimated Premium	₹ 1,000.00
Maximum Treaty Capacity	₹ 100.00	Class of Business	Business	Contract Currency	INR
SOA Cycle	Half Yearly	Max Days to Share SOA	100	Claim Recovery Limit (amount)	₹ 100.00
Number of Days for Settlement	100	Claim Notification Limit (amount)	₹ 1,000.00		
Section Remark	TreatyName				

**Placement Details:**

Placement 1 + Reinsurer Details		
Broker Name	Broker Share %	Total %
Axis Insurance prt ltd	70.000000 %	70.000000 %

Placement 2		
Broker Name	Broker Share %	Total %
Axis Insurance prt ltd	30.000000 %	30.000000 %

At the bottom right of the interface, there are "Back" and "Close" buttons.

### 4.3. List Management and Navigation

Standard list features including search, filter, export, pagination, and sorting capabilities are available.

#### 4.3.1. Contract Details Access

Click on **Contract placement ID** to view placement details with standard navigation between Basic Details and Section/Layer or Placement Details.

ETASS Reinsurance

Contract placement return from reinsurer

Contract placement return from reinsurer

List of contract placements

CPID	Contract ID	Section/Layer ID	Cedant code	Broker code	Reinsurer code	Contract name	Contract type	Start date	End date
NIA2526SUR00501NIA01	NIA2526SUR000	NIA2526SUR000501	NIA	IFK	NIA	Treaty 25-06-Prop03	Surplus	01-06-2025	29-08-2025
PNB2526FAC004HDF02	PNB2526FAC004	-	PNB	IFK	HDF	PNB_InsuredName	-	13-06-2025	13-06-2025

Showing 1 to 2 of 2 placements

ETASS Reinsurance

Contract Placement ID - PNB2526FAC004HDF02

Contract Placement

Contract Placement ID - PNB2526FAC004HDF02

Contract details

Basic details

Treaty/FAC	Proportional FAC	Cedant policy number	PNB7777_policyNumber	Insured name	PNB_InsuredName
Policy start date	13-06-2025	Policy end date	18-06-2025	UW year	2025 - 2025
Class of business	Business	Sub class of business	PNB_Sub_CLASS	Risk location	PNB_RiskLocation
SI 100%	100.00	Fac: out 100% of policy SI	100.00000	Contract currency	INR
Occupancy	PNB_Occupancy	Loss limit	₹ 100,000.00	Policy deductible	₹ 100,000.00
Cedant name	Punjab national insurance pvt ltd	Additional details	PNB_AdditionalDetails	Contract remarks	PNB_ContractRemark
Contract creation date	04-08-2025				

Cover details

Coverage	Description of coverage	Amount
PNB_Coverage	PNB_DescriptionCov	₹ 100,000.00
PNB_CoverageOne	PNB_DescriptionCovOne	₹ 200,000.00

Installation details

Number of installments

1

Installation 1 due date

14-06-2025

Back Next

#### 4.4. Available Actions Based on Scenarios

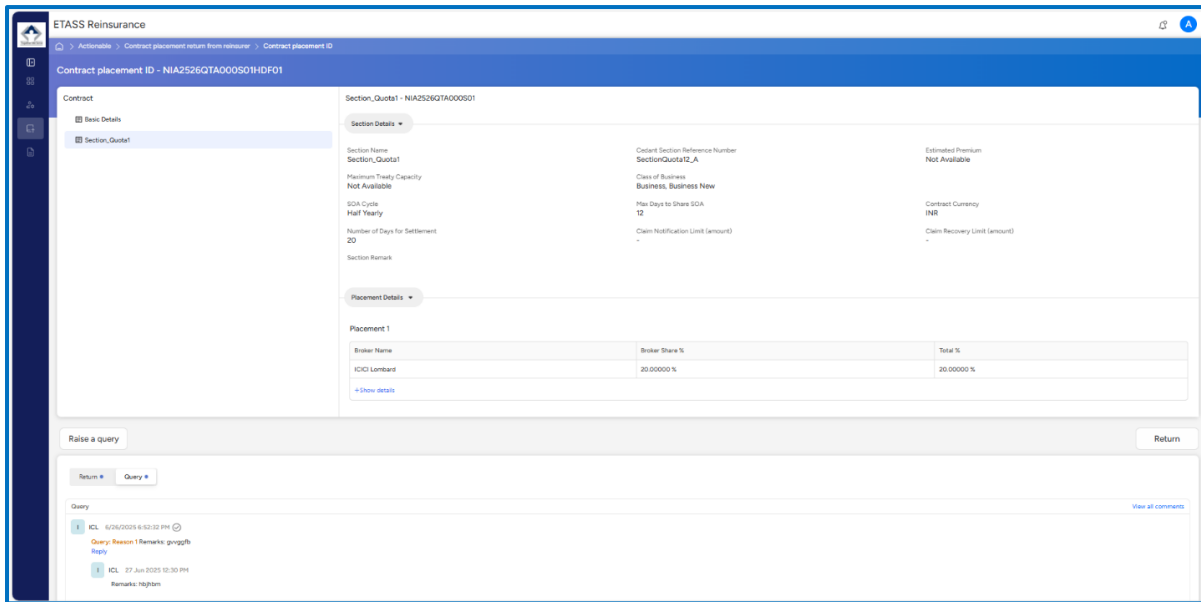
The available actions depend on how the original contract was created:

##### Scenario 1: Cedant Added Only Broker (Broker Added Reinsurer Later)

Available buttons: **Return, Edit, Raise a Query**

##### Scenario 2: Cedant Added Broker with Reinsurer

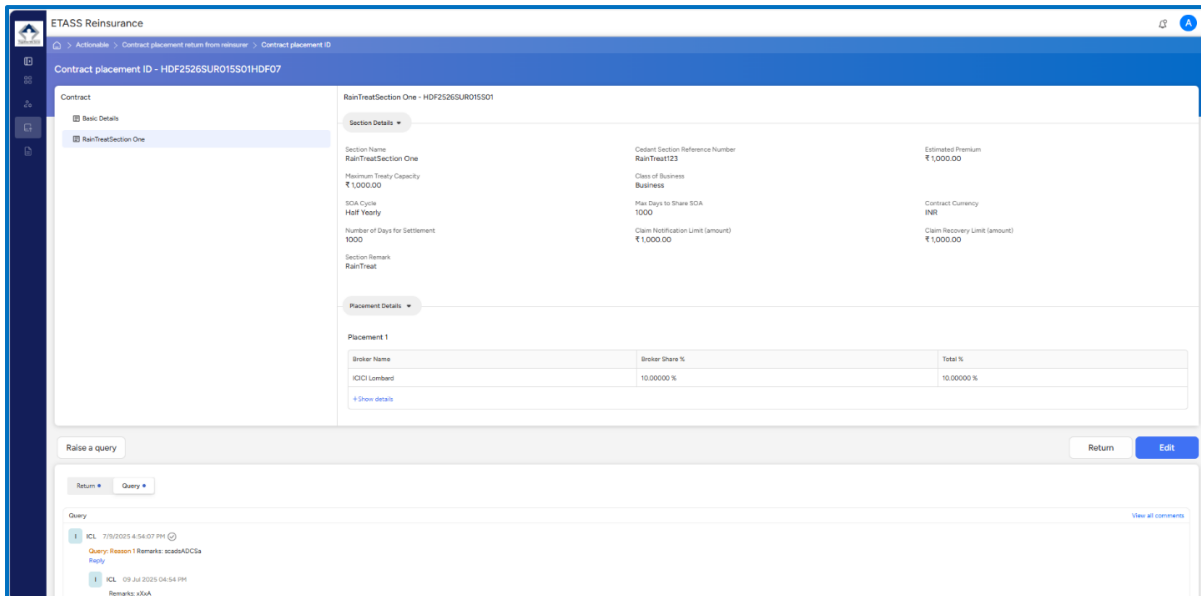
Available buttons: **Return, Raise a Query**



## Action Descriptions

### 4.5. Raise Query

- Submit questions or concerns to cedant
- Standard query form with reason selection and description
- View query history (latest 3 with replies)



View Details			
Cedant name Punjab national Insurance pvt ltd	Cedant Policy Number ASD_123	Under writing year 2025 - 2025	Contract ID PNB2526AC007
Source broker name ICICI Lombard	Broker code AXS	Broker name Axis Insurance pvt ltd	Broker share % 60.00000
<b>Source broker</b>			
Source broker name ICICI Lombard	Source broker code ICL	Source broker share % 10.00000	Source broker reference number -
Source broker brokerage % -			
<b>Placement Broker</b>			
Placement broker name -	Placement broker code -	Placement broker share % -	Placement broker reference number -
Placement broker brokerage % -			
<b>Reinsurer Details</b>			
Reinsurer code K25	Reinsurer name KIAINSURANCE	IRDAI registration number IRDAI/2026/CHK25	Reinsurer country name India
Reinsurer share 30.00000	Reinsurer reference number -	Broker reference number axis123	Brokerage % 10.00000
Brokerage amount ₹ 10,000.00	FAC premium (Reinsurer Share) ₹ 10.00	Rating commission % 10.00000	Rating commission amount ₹ 10.00
Contract currency INR	Settlement currency INR		
Other details -			
Is this a related party? -			

**ETASS Reinsurance**

Contract placement ID - HDF2526SUR01550IHD/P07

**Raise a query**

Contract ID	Section ID	Placement ID
HDF2526SUR015	HDF2526SUR01550I	HDF2526SUR01550IHD/P07

Query reason  
Please Select

Query Description  
Enter Description

[Raised to HDFC Insurance pvt ltd](#)

Submit

**Contract Details**

Section Name: RainTreatSection One - HDF2526SUR015

Section Name: RainTreatSection One

Maximum Treaty Capacity: ₹ 1,000.00

SOA Cycle: Half Yearly

Number of Days for Settlement: 1000

Section Remark: RainTreat

**Placement Details**

Placement 1

Broker Name	Broker Share %	Total %
ICICI Lombard	10.00000 %	10.00000 %

**Table Details**

Source Broker Name	Source Broker Share	Placement Broker Name	Placement Broker Share	Reinsurer Name	Reinsurer Share	Status	Actions
-	-	-	-	HDFC Insurance pvt ltd	5.00000 %	Returned by reinsure	View Details

Estimated Premium: ₹ 1,000.00

Contract Currency: INR

Claim Reserve (Limit Inward): ₹ 1,000.00

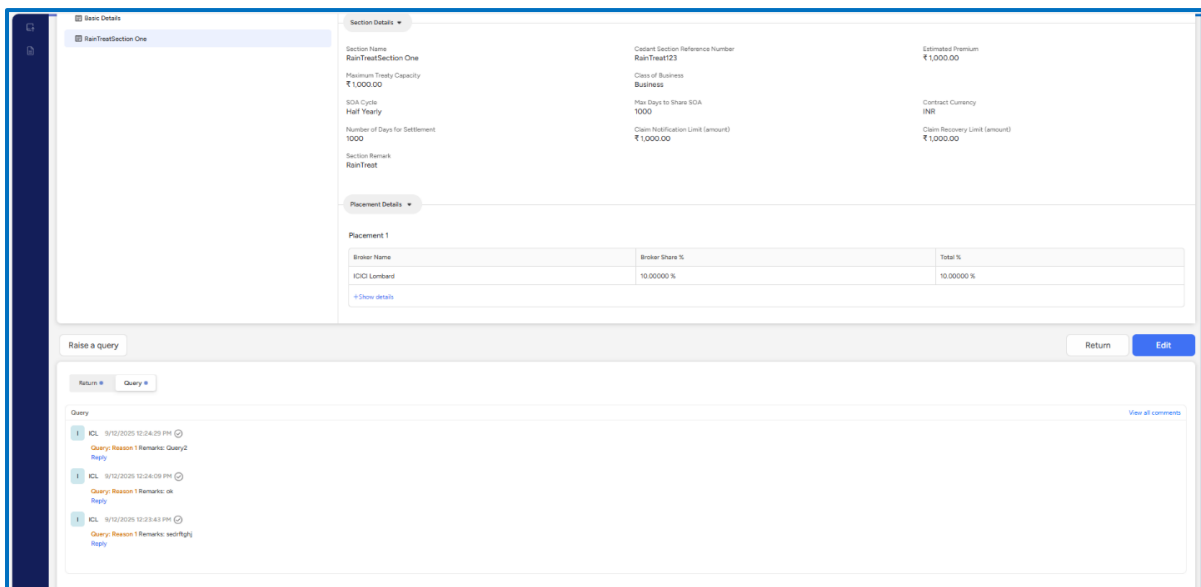
Return Edit

Query: ICL 7/8/2025 4:54:07 PM

Query Reason: Remarks: scdmADCCls

## Return to Cedant

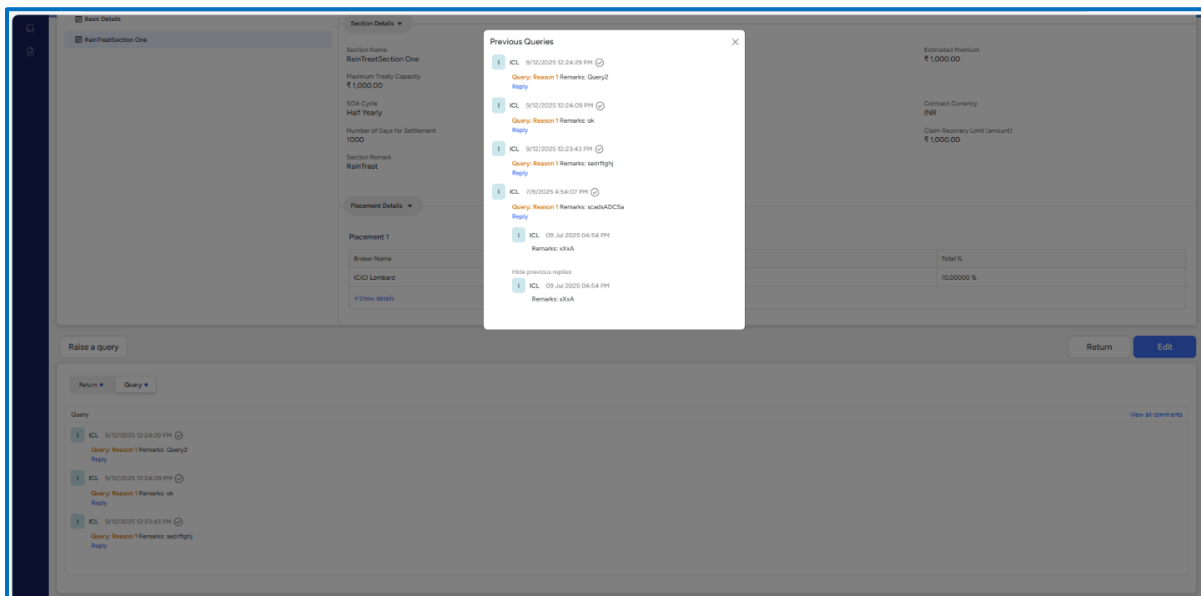
- Return contract back to cedant with reason
- Select return reason and provide description
- View return comment history

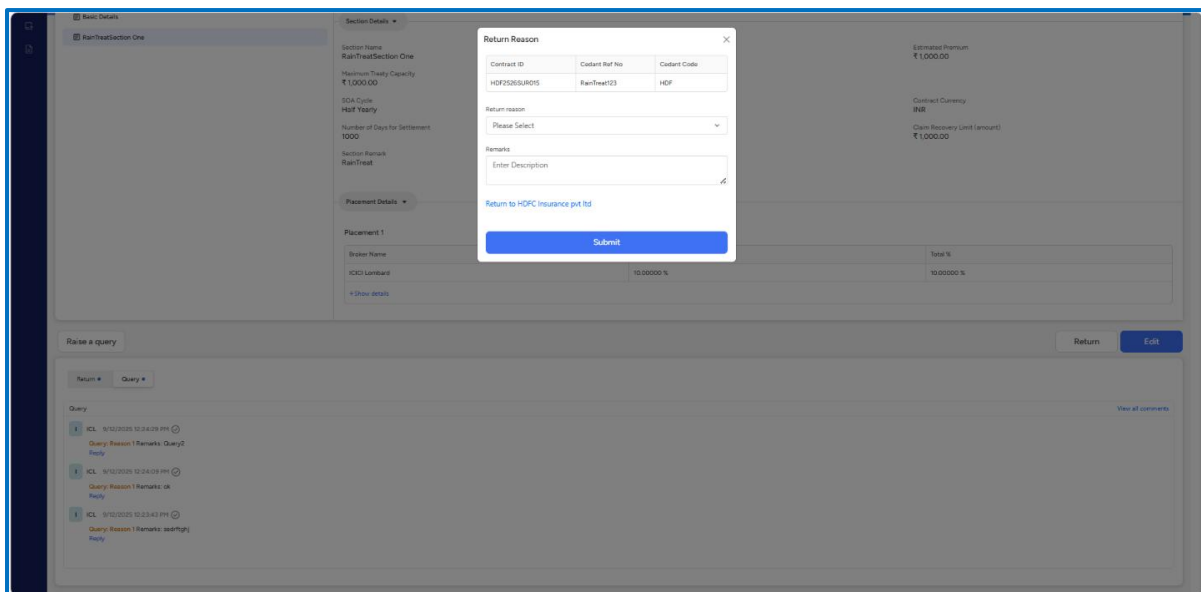


## 4.6. Edit Placement Details

Available when broker previously added reinsurer details:

- Click **Edit** to modify placement details
- Can only edit broker-added details, not cedant-added details
- After clicking Edit, interface shows Back and Submit (disabled) buttons





## 4.7. Editing Capabilities

### Edit Functions:

- Click edit icon to modify placement details
- Click delete icon to remove placement details
- Modify Source broker, Placement broker, and reinsurer information

### Edit Form Features:

- **Cancel:** Return to previous page without saving
- **Save:** Save all modifications

### Dynamic Button States:

- **" +Reinsurer details "** button enables when broker share  $\neq$  sum of reinsurer shares
- **" +Reinsurer details "** button disables when shares balance
- **Submit** button enables when placements have "Modified by broker" status and shares balance

ETASS Reinsurance

Contract ID - HDF2526SUR015

Contract

RainTreatSection One - HDF2526SUR015S01

**Section Details**

Section Name RainTreatSection One	Cedant section Reference Number RainTreat123	Estimated Premium ₹1,000.00
Maximum Treaty Capacity ₹1,000,000	Class of Business Not Available	
SOA Code Not Available	Max Days to Share SOA 1000	Number of Days for Settlement 1000
Cash Call Limit Notification ₹1,000,000	Cash Call Recovery Limit ₹1,000,000	

**Placement Details**

Through Broker Placement

Placement 1 + Reinsurer Details

Broker Name	Broker Share %	Total %
ICICI Lombard	10,00000 %	10,00000 %

+ Show details

Placement 2 + Reinsurer Details

Broker Name	Broker Share %	Total %
ICICI Lombard	10,00000 %	10,00000 %

+ Show details

Back Submit

## Submission Logic

- **Submit** button sends modified details for approval
- If broker-related data modified → sent to reinsurer for approval
- If reinsurer-related data modified → sent to cedant for approval

## 5. Actionable IV: Contract Placement Return from Cedant

### 5.1. Overview

This bucket contains contract placements returned by the cedant to the broker for revision.

### 5.2. Accessing the Module

1. Click on **Menu**
2. Select **Actionable**
3. Click on "**Contract placement return from cedant**" bucket item

The screenshot displays the 'Rain Treat Section One' interface. It includes a 'Section Details' section with fields for Section Name, Maximum Treaty Capacity, SOA Cycle, Cash Call Limit Notification, Cedant section Reference Number, Class of Business, Max Days to Share SOA, and Cash Call Recovery Limit. Below this is the 'Placement Details' section, which is divided into 'Through Broker Placement' and two placement entries, 'Placement 1' and 'Placement 2'. Each placement entry shows a summary table with Broker Name, Broker Share %, and Total %, followed by a detailed table listing reinsurance contracts with columns for CRID, Source Broker Name, Source Broker Share, Placement Broker Name, Placement Broker Share, Reinsurer Name, Reinsurer Share, Status, and Actions.

CRID	Source Broker Name	Source Broker Share	Placement Broker Name	Placement Broker Share	Reinsurer Name	Reinsurer Share	Status	Actions
HCF2325RUR015529MAX06	-	-	-	-	Max Health Insurance	5.00000 %	Sent to reinsurer	<a href="#">Edit</a> <a href="#">Delete</a>
HCF2325RUR015529H0R06	-	-	-	-	HEPC Insurance pvt ltd	5.00000 %	Sent to reinsurer	<a href="#">Edit</a> <a href="#">Delete</a>

CRID	Source Broker Name	Source Broker Share	Placement Broker Name	Placement Broker Share	Reinsurer Name	Reinsurer Share	Status	Actions
HCF2325RUR015529MAX07	-	-	-	-	Max Health Insurance	5.00000 %	Pending cedant confirmation	<a href="#">Edit</a> <a href="#">Delete</a>
HCF2325RUR015529H0R07	-	-	-	-	HEPC Insurance pvt ltd	5.00000 %	Returned by reinsurer	<a href="#">Edit</a> <a href="#">Delete</a>

### 5.3. Contract Management

Standard list management features and navigation patterns apply, similar to previous sections.

#### Contract Details View

The screenshot displays the 'Edit Reinsurer' form with the following data:

Field	Value
Client name	HDFC Insurance pvt ltd
Broker code	ICL
Trade name	BanTrade
Broker name	ICICI Lombard
Order writing year	2024 - 2025
Broker share %	10.00000 %
Contract ID	HDFCINSUR015

Source broker

Reinsurer details

Field	Value
Reinsurer code *	HDF
Reinsurer name *	HDFC Insurance pvt ltd
Reinsurer share %*	5.00000
Commission type *	Ok
Withdraw %	0.00000
Premium withdrawal %	0.00000
LPC temp	Enter here
Reinsurer country name*	India
Reinsurer Reference Number	Enter here
Settlement currency *	INR
Loss entry %	0.00000
PF transfer date	12-09-2025

Other details:

Profit commission:

Commutation date:

Margin %:

Loss withdrawal %:

Brokerage %\*:

Contract currency\*:

Reinsurer registration number:

Reinsurer Section reference number\*:

Other details:

Is this a related party?

Buttons: Cancel, Save

### 5.4. Available Actions

On Section/Layer details or Placement Details pages:

- **Back:** Navigate to basic details
- **Edit:** Modify placement details (broker-added content only)
- **Raise a Query:** Submit questions to cedant

**Share Details**

**RainTreatSection One**

**Section Details**

Section Name RainTreatSection One	Cedant section Reference Number RainTreat123	Estimated Premium ₹ 1,000.00
Maximum Treaty Capacity ₹ 1,000.00	Class of Business Not Available	
SOA Cycle Not Available	Max Days to Share SOA 1000	Number of Days for Settlement 3000
Cash Call Limit Notification ₹ 1,000.00	Cash Call Recovery Limit ₹ 1,000.00	

**Placement Details**

Through Broker Placement

**Placement 1** + Reinsurer Details

Broker Name	Broker Share %	Total %						
ICICI Lombard	10.00000 %	10.00000 %						
<a href="#">-- Hide details</a>								
CPID	Source Broker Name	Source Broker Share	Placement Broker Name	Placement Broker Share	Reinsurer Name	Reinsurer Share	Status	Actions
HF2526SUR015501MAX0G	-	-	-	-	Max Health Insurance	5.00000 %	Sent to reinsurer	<a href="#">✎</a> <a href="#">✖</a>
HF2526SUR015501QF06	-	-	-	-	HDFC Insurance pri Ltd	5.00000 %	Sent to reinsurer	<a href="#">✎</a> <a href="#">✖</a>

**Placement 2** + Reinsurer Details

Broker Name	Broker Share %	Total %						
ICICI Lombard	10.00000 %	10.00000 %						
<a href="#">-- Hide details</a>								
CPID	Source Broker Name	Source Broker Share	Placement Broker Name	Placement Broker Share	Reinsurer Name	Reinsurer Share	Status	Actions
HF2526SUR015501MAX0Z	-	-	-	-	Max Health Insurance	5.00000 %	Pending cedant confirmation	<a href="#">✎</a> <a href="#">✖</a>
HF2526SUR015501QF0P	-	-	-	-	HDFC Insurance pri Ltd	5.00000 %	Modified by broker	<a href="#">✎</a> <a href="#">✖</a>

Back Submit

## 5.5. Query Management

### Raise Query Process:

- Select query reason from dropdown
- Enter detailed query description
- Submit query to cedant

ETASS Reinsurance

Contract placement return from cedant

Contract placement return from cedant

List of contract placements

CPID	Contract ID	Section/Layer ID	Cedant code	Broker code	Reinsurer code	Contract name	Contract type	Start date	End date
425226SUR00205142602	425226SUR00205142602	425226SUR002051	K25	ICL	K25	Surplus	Surplus	22-06-2025	31-04-2025
NA2526CL105011NA21	NA2526CL105011NA21	NA2526CL10501	NIA	ICL	NIA	Tk_0407_1150	Cat Nat	04-07-2025	09-07-2025
NA2526CL105011NA251	NA2526CL105011NA251	NA2526CL10501	NIA	ICL	K25	My Treaty 16	Cat Nat	11-07-2025	31-07-2025
NA2526CL105011NA252	NA2526CL105011NA252	NA2526CL10501	NIA	ICL	PNB	2102020	Cat Nat	19-07-2025	18-07-2025
NA2526FAC10201NA02	NA2526FAC10201NA02	-	NIA	ICL	MAX	Test 123	-	24-07-2025	24-07-2025
NA2526FAC10501NA01	NA2526FAC10501NA01	-	NIA	ICL	PNB	210a	-	11-08-2025	11-08-2025
NA2526FAC10501NA02	NA2526FAC10501NA02	-	NIA	ICL	PNB	210a	-	11-08-2025	11-08-2025
NA2526FAC10501NA03	NA2526FAC10501NA03	-	NIA	ICL	MAX	TTST023	Surplus Cum Quota	11-08-2025	04-06-2025
NA2526SUR00205142602	NA2526SUR00205142602	NA2526SUR002051	NIA	ICL	K25	Bandwidth	Surplus	19-08-2025	20-08-2025
NA2526SUR002051NA01	NA2526SUR002051NA01	NA2526SUR002051	NIA	ICL	NIA	My Treaty 34	Surplus	04-07-2025	08-08-2025

Showing 1 to 10 of 10 placements

ETASS Reinsurance

Contract Placement ID - NIA2526FAC185PNB01

**Contract**

- Basic details
- Placement details

**Basic details**

Treaty/FAC <b>Proportional FAC</b>	Client policy number <b>KXVC</b>	Insured name <b>Zisa</b>
Policy start date <b>11-08-2025</b>	Policy end date <b>20-08-2025</b>	UW year <b>-</b>
Class of business <b>BusinessA</b>	Sub class of business <b>-</b>	Risk location <b>-</b>
SI 100% <b>1.00</b>	Fac out 100% of policy SI <b>1.00000</b>	Contract currency <b>INR</b>
Occupancy <b>-</b>	Loss limit <b>₹ 0.00</b>	Policy deductible <b>₹ 0.00</b>
Client name <b>New India Assurance</b>	Additional details <b>-</b>	Contract remarks <b>-</b>
Contract creation date <b>11-08-2025</b>		

**Cover details**

Figure are in INR.

Coverage	Description of coverage	Amount
1	1	₹1.00

**Installment details**

Number of installments  
**1**

Installment 1 due date  
**12-08-2025**

Back Next

ETASS Reinsurance

Contract Placement ID - NIA2526FAC185PNB01

**Contract**

- Basic details
- Placement details

**Placement 1**

Broker Name	Broker Share %	Total %
ICD Lombard	100.00000 %	100.00000 %

← Hide details

Source Broker Name	Source Broker Share	Placement Broker Name	Placement Broker Share	Reinsurer Name	Reinsurer Share	Status	Actions
IFCO Insurance Company	TS	-	-	Punjabi national insurance pvt ltd	50.00000 %	Modified by broker	View Details

Raise a query

Back Edit

return Query

Query

1 ICL 07/08/2025 3:42:18 PM  
Query Reason:1 Remarks:50/7  
Reply

1 ICL 20 Aug 2025 03:43 PM  
Remarks: 667

View previous replies

View Details			
Cedant name Punjab national insurance pvt ltd	Cedant Policy Number ASD_123	Under writing year 2025 - 2025	Contract ID PNB2526FAC007
Broker code AXS	Broker name Axis Insurance pvt ltd	Broker share % 60.00000	
<b>Source broker</b>			
Source broker name ICICI Lombard	Source broker code ICL	Source broker share % 10.00000	Source broker reference number -
Source broker brokerage % -			
<b>Placement Broker</b>			
Placement broker name -	Placement broker code -	Placement broker share % -	Placement broker reference number -
Placement broker brokerage % -			
<b>Reinsurer Details</b>			
Reinsurer code K25	Reinsurer name KIAINSURANCE	IRDAI registration number IRDAI/2026/CHK25	Reinsurer country name India
Reinsurer share 30.00000	Reinsurer reference number -	Broker reference number axis123	Brokerage % 10.00000
Brokerage amount ₹ 10,000.00	FAC premium (Reinsurer Share) ₹ 10.00	Ceding commission % 10.00000	Ceding commission amount ₹ 10.00
Contract currency INR	Settlement currency INR		
Other details -			
Is this a related party? -			

## 5.6. Editing Returned Contracts

### Edit Functionality:

- Modify only broker-added placement details
- Cannot edit cedant-added information
- Standard editing interface with save/cancel options

The screenshot shows the ETASS Reinsurance interface. A 'Raise a query' dialog box is open, allowing users to report issues with contract placements. The dialog box contains the following fields:

- Contract ID: NIA2526FAC185
- Section ID: -
- Placement ID: NIA2526FAC185PNB01
- Query reason: Please Select (dropdown menu)
- Query Description: Enter Description (text input)

Below the input fields, there is a link that says 'Raised to New India Assurance' and a blue 'Submit' button. The background shows the contract placement details for Contract Placement ID - NIA2526FAC185PNB01, including broker details (ICICI Lombard) and reinsurer details (KIAINSURANCE).

### Submission Process:

- Submit button enables when modifications are complete and shares balance
- Submit sends edited details back to cedant for approval

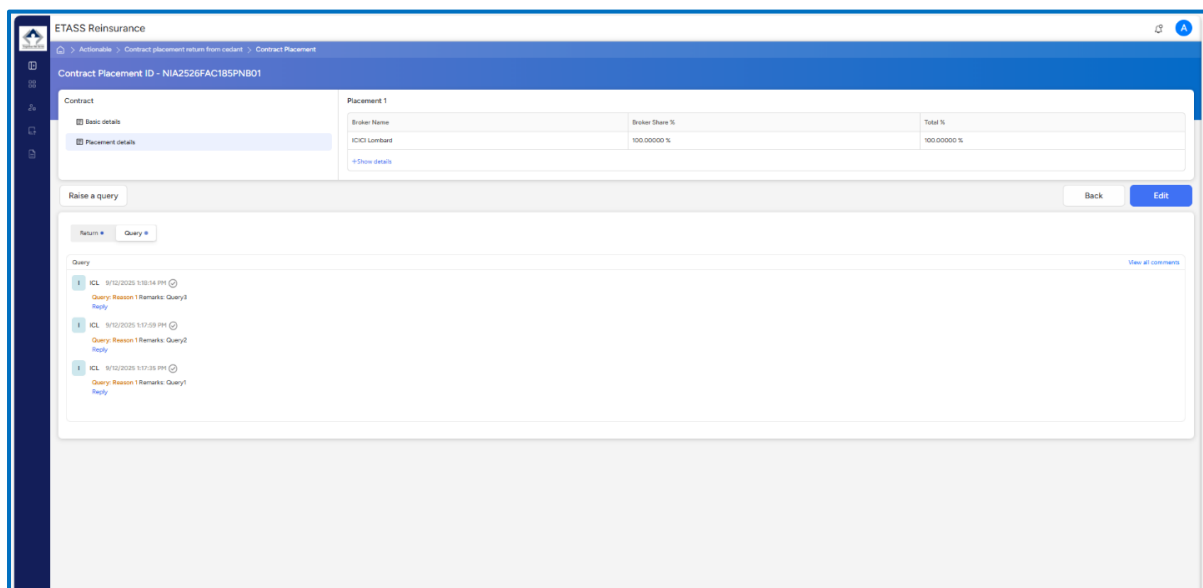
## 6. Broker View Module

### 6.1. Overview

The View module allows brokers to access contract placement information for placements that have been approved and submitted.

### 6.2. Accessing the Module

1. Click on **Menu**
2. Select **View**

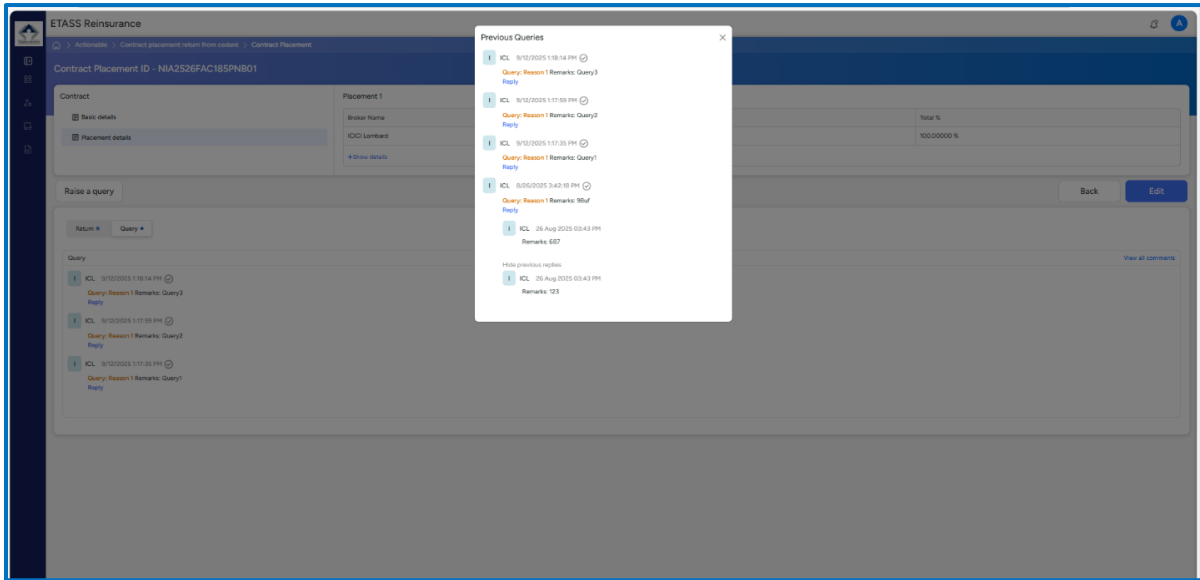


### 6.3. List Features

Standard functionality including search, filter, export, pagination, and sorting capabilities.

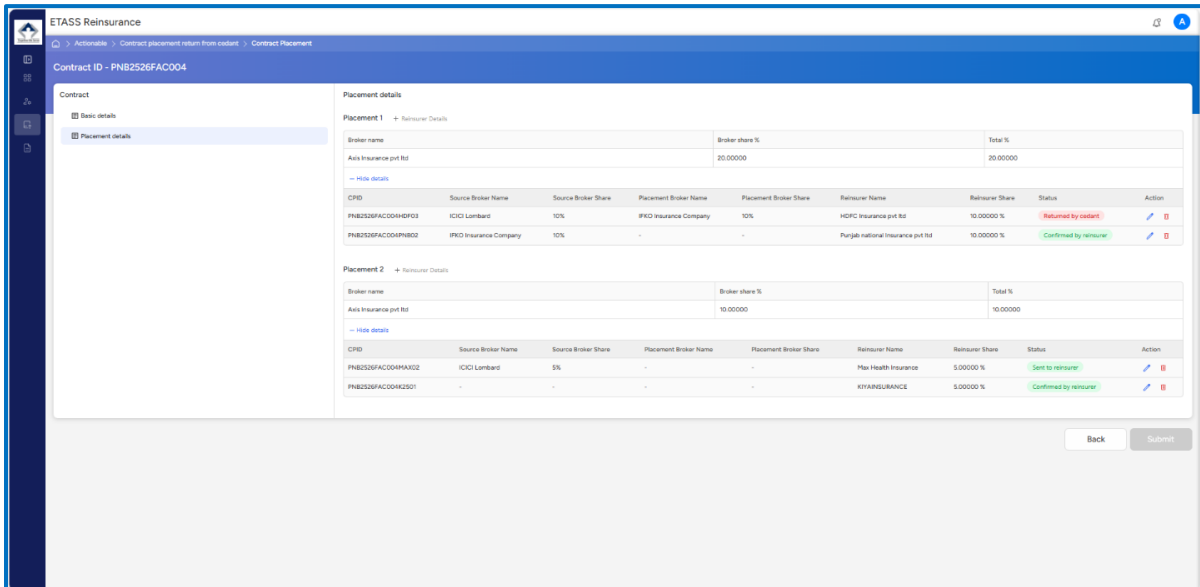
#### Contract Placement Details

Click on **Contract placement ID** to view comprehensive placement information.



## Navigation Patterns

Standard navigation between Basic Details and Section/Layer or Placement Details tabs.



### 6.4. Broker Role-Based Interface

The interface varies based on the logged-in broker's role in the placement:

#### When Broker is NOT Part of Placement

Available actions:

- **Close:** Navigate to placement list page
- **Back:** Navigate to basic details

- **Show/Hide details:** Toggle placement grid visibility

**Edit Reinsurer**

Client name: Punjab national Insurance pvt ltd     
 Contract Policy Number: PNB7777\_policyNumber     
 Under writing year: 2025 - 2025     
 Contract ID: PNB2526FAC004  
 Broker code: AXS     
 Broker name: Axis Insurance pvt ltd     
 Broker share %: 20.00000 %

---

**Source broker**

Source broker code\*: ICL     
 Source broker name\*: ICICI Lombard     
 Source broker share %\*: 10.00000     
 Source broker reference number: Source\_12345  
 Source broker brokerage %:  Enter here

---

**Placement broker**

Placement broker code\*: IFK     
 Placement broker name\*: IFK Insurance Company     
 Placement broker share %\*: 10.00000     
 Placement broker reference number: Placement\_12345  
 Placement broker brokerage %:  Enter here

---

**Reinsurer details**

Reinsurer code\*: HDF     
 Reinsurer name\*: HDFC Insurance pvt ltd     
 IRDI registration number: 999     
 Reinsurer country name\*: India  
 Reinsurer share %\*: 10.00000     
 Broker reference number\*: AXIS-123     
 Brokerage %\*: 10.00000     
 Reinsurer Reference Number:  Enter here  
 Brokerage amount\*: 100000.00     
 FAC premium (Reinsurer share)\*: 100.00     
 Ceding commission %\*: 100.00000     
 Ceding commission amount\*:  100000.00  
 Contract currency\*: INR     
 Settlement currency\*: INR

Other details:  ok

**ETASS Reinsurance**

Contract ID - PNB2526FAC004

Contract Placement

Contract: **Placement details**

**Placement 1** + Reinsurer Details

Broker name	Broker share %	Total %
Axis Insurance pvt ltd	20.00000	20.00000

→ Hide details

CPID	Source Broker Name	Source Broker Share	Placement Broker Name	Placement Broker Share	Reinsurer Name	Reinsurer Share	Status	Action
PNB2526FAC004HDF03	ICICI Lombard	10%	IFK Insurance Company	10%	HDFC Insurance pvt ltd	10.00000 %	Modified by broker	<a href="#">✎</a> <a href="#">✖</a>
PNB2526FAC004IFK02	IFK Insurance Company	10%	-	-	Punjab national Insurance pvt ltd	10.00000 %	Confirmed by reinsurer	<a href="#">✎</a> <a href="#">✖</a>

**Placement 2** + Reinsurer Details

Broker name	Broker share %	Total %
Axis Insurance pvt ltd	10.00000	10.00000

→ Hide details

CPID	Source Broker Name	Source Broker Share	Placement Broker Name	Placement Broker Share	Reinsurer Name	Reinsurer Share	Status	Action
PNB2526FAC004HDF02	ICICI Lombard	5%	-	-	Hdf Health Insurance	5.00000 %	Sent to reinsurer	<a href="#">✎</a> <a href="#">✖</a>
PNB2526FAC004HDF01	-	-	-	-	KYINSURANCE	5.00000 %	Confirmed by reinsurer	<a href="#">✎</a> <a href="#">✖</a>

ETASS Reinsurance

View contract placements

List of contract placements

Contract placement ID	Contract ID	Company name	Contract name	Contract type	Start date	End date	Status
BAG2526RCX001L01MAX01	BAG2526RCX001	Bajaj Allianz General Insurance Company Limited	TreatyTest3	Risk Cum Cat Xol	01-07-2025	17-07-2025	-
HDF2526CXU002L01KZ501	HDF2526CXU002	HDFC Insurance pvt ltd	TN_1407_1843	Cat Xol	14-07-2025	15-07-2025	Sent to Cedant
HDF2526SUR003S01MAX01	HDF2526SUR003	HDFC Insurance pvt ltd	TreatyBroker11	Surplus	26-05-2025	30-05-2025	Completed
HDF2526SUR014S01KZ501	HDF2526SUR014	HDFC Insurance pvt ltd	BrokerTest	Surplus	06-06-2025	07-06-2025	-
HDF2526SUR015S01MAX04	HDF2526SUR015	HDFC Insurance pvt ltd	RainTreat	Surplus	05-06-2025	07-06-2025	Sent to Reinsurer
HDF2526SUR015S01HDF01	HDF2526SUR015	HDFC Insurance pvt ltd	RainTreat	Surplus	05-06-2025	07-06-2025	Sent to Reinsurer
HDF2526SUR015S01MAX03	HDF2526SUR015	HDFC Insurance pvt ltd	RainTreat	Surplus	05-06-2025	07-06-2025	Sent to Reinsurer
HDF2526SUR015S01MAX02	HDF2526SUR015	HDFC Insurance pvt ltd	RainTreat	Surplus	05-06-2025	07-06-2025	Sent to Reinsurer
HDF2526SUR016S01HDF03	HDF2526SUR016	HDFC Insurance pvt ltd	RainTreat	Surplus	05-06-2025	07-06-2025	Return from Broker
HDF2526SUR016S01HDF02	HDF2526SUR016	HDFC Insurance pvt ltd	RainTreat	Surplus	05-06-2025	07-06-2025	-

Showing 1 to 10 of 390 placements

### When Broker IS Part of Placement (Source or Placement Broker)

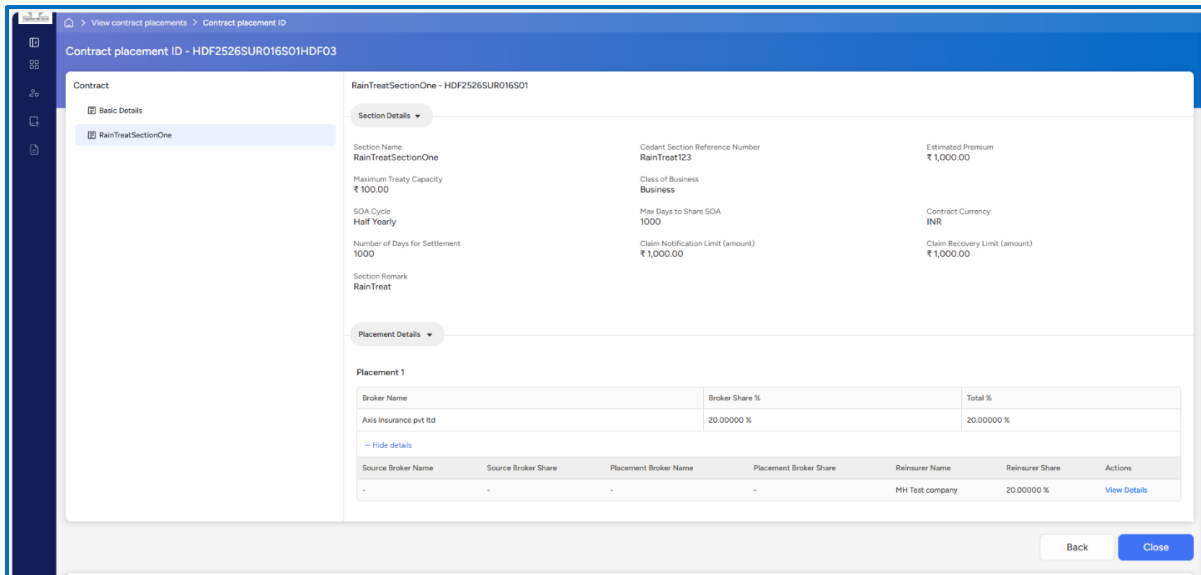
ETASS Reinsurance

View contract placements > Contract placement ID

Contract placement ID - BAG2526RCX001L01MAX01

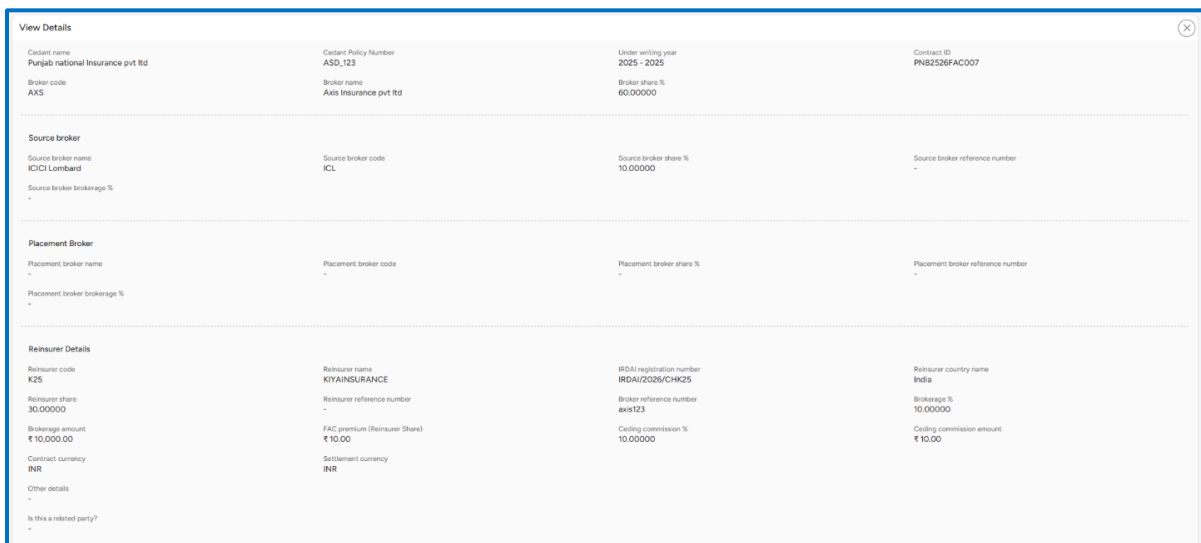
Contract	Basic Details
<ul style="list-style-type: none"> <li>Basic Details</li> <li>Layer1BP34</li> </ul>	<p>Reinsurance Type Non Proportional Treaty</p> <p>Treaty leader name MyLeader33</p> <p>Type of contract Risk Cum Cat Xol</p> <p>XOL Type Loss Occuring Basis</p> <p>Contract creation date 17-07-2025</p> <p>Treaty name TreatyTest3</p> <p>Treaty start date 01-07-2025</p> <p>Type of sub contract -</p> <p>Days to render adjustment account 10</p> <p>Treaty number TreatyTest34</p> <p>Treaty end date 17-07-2025</p> <p>Contract currency INR</p> <p>Cedant Name Bajaj Allianz General Insurance Company Limited</p>

Back Next



## 6.5. Reference Number Management

- Source broker reference number and placement broker reference number fields are mandatory
- Appropriate text box enabled based on logged-in broker's role (source or placement broker)
- **Cancel:** Return to placement details page
- **Save:** Save the reference number information



## 6.6. Query Functionality

- **Raise a Query:** Submit questions to main broker

- Select query reason and provide description
- View query history (latest 3 queries with replies)

**ETASS Reinsurance**

View contract placements > Contract placement ID

Contract placement ID - HDF2526SUR023501PNB01

**Contract**

Sec TN\_2306\_1607 - HDF2526SUR023501

**Section Details**

Section Name Sec TN_2306_1607	Cedant Section Reference Number CSRN1234567	Estimated Premium ₹ 5,435,345,345.00
Maximum Treaty Capacity Not Available	Class of Business Business, BusinessA	
SOA Cycle Annually	Max Days to Share SOA 45	Contract Currency INR
Number of Days for Settlement 33	Claim Notification Limit (amount) -	Claim Recovery Limit (amount) -

Section Remark

**Placement Details**

CPID	Broker Name	Source Broker Name	Placement Broker Name	Reinsurer Name	Reinsurer Share	Status	Actions
HDF2526SUR023501PNB01	Axis Insurance pvt ltd	ICICI Lombard	-	Punjab national Insurance pvt ltd	50.00000 %	Pending cedant confirmation	View Details

Raise a query Back Close

Return Query

Query View all comments

**ETASS Reinsurance**

View contract placements > Contract placement ID

Contract placement ID - HDF2526SUR032501CCP01

**Contract**

Sec 1 TN\_2406\_1710 - HDF2526SUR032501

**Section Details**

Section Name Sec 1 TN_2406_1710	Cedant Section Reference Number Ref9879	Estimated Premium Not Available
Maximum Treaty Capacity Not Available	Class of Business Business	
SOA Cycle Annually	Max Days to Share SOA 34	Contract Currency INR
Number of Days for Settlement 34	Claim Notification Limit (amount) -	Claim Recovery Limit (amount) -

Section Remark

**Placement Details**

CPID	Broker Name	Source Broker Name	Placement Broker Name	Reinsurer Name	Reinsurer Share	Status	Actions
HDF2526SUR032501CCP01	Axis Insurance pvt ltd	ICICI Lombard	IFKO Insurance Company	C Company Syndicate Pvt Ltd	50.00000 %	Sent to reinsurer	View Details

Raise a query Back Close

Return Query

Query View all comments

View Details			
Cedant name HDFC Insurance pvt ltd	Treaty name TN_2306_1607	Under writing year 2024 - 2025	Contract ID HDF2526SURO23
Broker code AXS	Broker name Axis Insurance pvt ltd		
<b>Source broker</b>			
Source broker name ICICI Lombard	Source broker code ICL	Source broker share % 12.00000	Source broker reference number * <input type="text"/>
Source broker brokerage % -			
<b>Placement Broker</b>			
Placement broker name -	Placement broker code -	Placement broker share % -	Placement broker reference number -
Placement broker brokerage % -			
<b>Reinsurer Details</b>			
Reinsurer code PNB	Reinsurer name Punjab national Insurance pvt ltd	IRDAI registration number g9077	Reinsurer country name India
Reinsurer share 50.00000	Broker section reference number kkg90	Brokerage % 80.00000	Reinsurer reference number
Commission type Ok	Commission % 12.00000	Contract currency INR	Settlement currency USD
Withhold % -	Margin % -	Premium entry % -	Loss entry % -
Premium withdrawal %	Loss withdrawal %	Commutation date	PF transfer date

End of Document