



**New South Wales Government  
Procurement System for Construction**

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**Procurement Practice Guide**

**Using the Procurement System  
Insurance Online System**

**July 2008**

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## **Important notices**

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### **Current version**

The current version of this Procurement Practice Guide is maintained on the Internet at:

<http://www.nswprocurement.com.au/Procurement-System-for-Construction/Reference-material/Procurement-practice-guides.aspx>

### **Amendments**

Refer to the Procurement Practice Guide Amendments Log which is available on the Internet at:

<http://www.nswprocurement.com.au/psc/ppg/amendments.aspx>

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To follow a hyperlink or URL:

- Right mouse click; and
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# Using the Procurement System Insurance Online System

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# Using the Procurement System Insurance Online System

## 1 Introduction

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### 1.1 Purpose

The Procurement System Insurance online system is maintained by the insurance broker to enable declaration of contracts to be covered by the Procurement System Contract Works and Public Liability Insurance Policy and to provide information and other administrative support for insurance matters.

This instruction provides details of:

- Insurance broker contact particulars;
- System Outline and Responsibilities of Agency Client Administrators and Project Managers
- Procedures for Declaring Contracts and requesting Quotations for the Procurement System Contract Works and Liability Insurance Policy; and
- Procedures for gaining and controlling access to the Procurement System Insurance online system.

### 1.2 Insurance Broker

Details of the insurance broker are:

Jardine Lloyd Thompson Pty Ltd  
Level 11, 66 Clarence Street  
SYDNEY NSW 2000

Contact Person: Brenda Duncan-Smith  
Telephone: 9290 8182  
Facsimile: 9262 2627  
Email: [duncb@jlta.com.au](mailto:duncb@jlta.com.au)

### 1.3 System Outline

The Procurement System Insurance online system relies on interaction between the following entities:

- the insurance broker,
- Project Managers,
- Agency Client Administrators (ACA) for each Principal, and
- Branch/Region/Project (B/R/P) Offices identified by Principals which will be responsible for receiving and paying invoices for insurance premiums

The roles and responsibilities of ACA and Project Managers are described below.

### 1.4 Agency Client Administrators

Access to the system is controlled by Agency Client Administrators, appointed by each Principal using the system. The ACA:

- inputs details of one or more B/R/P Offices which will be responsible for receiving and paying invoices for insurance premiums;
- inputs details of Project Managers authorised to use the system; and
- creates links between Project Managers and the Branch/Region/Project Offices to which invoices for premiums for contracts managed by each Project Manager are to be sent.

## 1.5 Project Managers

Project Managers:

- obtain access to the system by requesting access from the ACA;
- must ascertain which Branch/Region/Project Office is to be responsible for receiving and paying invoices for insurance premiums for a particular contract and obtain system authorisation to input contract details for a particular Branch/Region/Project Office, from the ACA;
- input contract details promptly after the contract is awarded, and
- may use the system to obtain premium quotations for contracts that are not within the standard coverage of the insurance policy.

Where these procedures describe actions or responsibilities of a Project Manager, these need not be performed personally by the Project Manager, but may be performed by employees of the Project Manager or other persons, as directed or arranged by the Project Manager, but the Project Manager remains responsible for the effective performance of those actions and responsibilities.

## 2 Declaring Contracts and Requesting Quotations

### 2.1 Project Managers accessing the system

To declare contracts for insurance or obtain quotations for insurance premiums Project Managers must first obtain access to the System in accordance with the procedures for gaining and controlling access in this instruction.

To declare a contract or obtain a quotation for insurance premiums, Project Managers must go to the system website at [www.jlta.com.au/nswgci](http://www.jlta.com.au/nswgci) and log in to the system. A sample login Page is shown in Figure 1.

Figure 1 Sample Login Page

The screenshot shows the login interface for the New South Wales Government Procurement System for Construction. At the top, there is a blue header with the NSW Government crest on the left, the text 'New South Wales Government Procurement System for Construction' in the center, and 'Privacy Policy' and 'Terms of Use' links on the right. Below the header is a navigation bar with links: 'Contract Details', 'Fax Application', 'Policy Wording', 'Financial Services Guide', 'Contact Details', and 'Log Out'. The main content area is titled 'Project Manager Login Page' and contains the text 'Please log in to continue'. There are two input fields: 'User name:' with a yellow highlight and 'Password:'. A 'Login' button is located below the password field. At the bottom, a footer contains the text: '© Copyright 2007 Jardine Lloyd Thompson Pty Limited - ABN 69 009 098 864 AFS Licence No: 226827'.

### 2.2 Declaring Contracts or Requesting Quotations

Once logged in, to declare a contract that has been awarded or obtain a quotation for insurance premiums, the Project Manager completes the details on the Contract Details Page. A sample Contract Details Page is shown in Figure 2

Figure 2 Sample Contract Details Page

**New South Wales Government Procurement System for Construction**

Privacy Policy Terms of Use  
JARDINE LLOYD THOMPSON

Contract Details Fax Application Policy Wording Financial Services Guide Contact Details Log Out

### Contract Details

Fields marked with \* are required.

Type  Quotation Request  Contract Declaration \*

Branch/Region/Project Office Responsible for Payments \*

If the required Branch/Region/Project Office responsible for receiving and paying invoices is not in the list please contact the client administrator for the Department/Agency/Corporation.

### Contractor Details

Contract Number \*

From Contractor and Consultant Management System.

Contract Name \*

Contract Type \*

GST Exclusive Value of Contract \*

Ten elevenths of the contract price.

Value of Principal Supplied Materials \*

GST exclusive.

Value of High Risk Civil Engineering Works \*

GST exclusive.

Value of existing structures for which contractor is responsible \*

GST exclusive.

Estimated Construction Period \*

Weeks.

### Location of Contract Site

Street Number

Street Name \*

Suburb/Town \*

Postcode \*

### Contractor

Name of Contractor

ABN

Date of Award of Contract

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### 2.3 Action in Response to Declaration or Request for Quotation

If the Project Manager selects Contract Declaration and the contract is eligible for coverage under the standard Procurement System Contract Works and Public Liability Insurance Policy, the insurance broker will immediately pass the details to the insurer and issue an invoice for the premium to the B/R/P Office named, with an information copy to the Project Manager, to assist the Project Manager in any necessary certification, monitoring and following up of payment.

If the Project Manager selects Quotation or the contract is not eligible for coverage under the standard Procurement System Contract Works and Public Liability

Insurance Policy, the insurance broker will provide further advice to the Project Manager.

#### **2.4 Other means of contact**

If the Project Manager is unable to use the Procurement System Insurance online system, the Project Manager may declare a contract or request a quotation by e-mail to the insurance broker, providing the same details as shown on the Contract Details Page.

### **3 Gaining and Controlling Access**

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#### **3.1 Registering an Agency Client Administrator**

Each Principal using the system must appoint an ACA. ACAs have the power to give Project Managers access, which enables them to record the commitment of substantial sums in insurance premiums, and of directing the delivery of invoices to different offices of the Principal. An ACA should be suitably knowledgeable, experienced, and responsible for these tasks.

To register an ACA, a senior manager of the Principal, usually in the Principal's major works office, must notify the following details to the insurance broker, preferably by e-mail:

- Agency ABN,
- Agency Name,
- ACA Name,
- ACA e-mail address,
- ACA voice phone number,
- ACA fax number,
- Contact e-mail and voice phone number for enquiries about the registration of the ACA.

Following any necessary verification, the insurance broker will register the ACA on the system and advise the ACA that registration has taken place.

If the details of a Principal's ACA change, the insurance broker must be notified of new details.

#### **3.2 ACA Creates Branch/Region/Project Office**

The ACA is responsible to input details of Branch/Region/Project (B/R/P) Offices which will be responsible for receiving and paying invoices for insurance premiums for particular contracts. Requirements to create B/R/P Offices will be identified by:

- the Principal's internal project initiating procedures, or
- requests from Project Managers.

The ACA must consider the Principal's invoice and claims paying arrangements and determine which of the Principal's offices should be responsible for receiving and paying invoices for insurance premiums for particular contracts or projects.

To create a B/R/P Office the ACA must notify the following details to the insurance broker, preferably by e-mail:

- B/R/P Office ABN,
- B/R/P Office Name,
- B/R/P Office Postal Address (street number, street name, town, state, postcode),
- B/R/P Office voice telephone number,
- B/R/P facsimile number,
- Name of person 'for attention of',

- e-mail address of person 'for attention of'.

### **3.3 Project Manager Requests access to the system**

If a Project Manager needs to enter contract details for insurance, or obtain insurance quotations, and the Project Manager does not already have a UserID and password, the Project Manager must send a request to the ACA of the Principal.

If the Project Manager does not know how to contact the ACA, the Project Manager should first enquire of the Project Director, or the Project Manager's normal contact person for the Principal. If the ACA still cannot be identified, the Project Manager must contact the insurance broker who will advise the name and contact details of the ACA.

If the insurance broker advises that there is no ACA registered for the Principal, the Project Manager must make arrangements through the Project Director, or the Project Manager's normal contact person for the Principal, for an ACA to be registered, and for the Project Manager to be given access to the system without delay.

To request user access, the Project Manager must notify the following details to the ACA, preferably by e-mail:

- ABN of Project Manager,
- Company Name of Project Manager,
- Individual Name of Project Manager or representative to be granted access to the system,
- e-mail address of Project Manager or representative,
- Project Manager voice telephone number,
- Project Manager facsimile number.

### **3.4 ACA Registers a Project Manager**

The ACA is responsible for registering details of Project Managers that are authorised to enter contract details on behalf of the Principal, where the Project Manager is not already registered on the system. Requirements to register a Project Manager will be identified by a request from a Project Manager.

To Register a Project Manager and obtain a UserID and password, the ACA must notify the following details to the insurance broker, preferably by e-mail:

- ABN of Project Manager,
- Company Name of Project Manager,
- Individual Name of Project Manager or representative to be granted access to the system,
- e-mail address of Project Manager or representative,
- Project Manager voice telephone number,
- Project Manager facsimile number.

### **3.5 Project Manager Requests authorisation for access to a B/R/P Office**

If a Project Manager with a UserID and password needs to enter contract details for insurance, or obtain insurance quotations, and the Project Manager does not have access to the relevant B/R/P Office, the Project Manager must send a request to the ACA of the Principal.

If the Project Manager does not know how to contact the ACA, the Project Manager should first enquire of the Project Director, or the Project Manager's normal contact person for the Principal. If the ACA still cannot be identified, the Project Manger must contact the insurance broker who will advise the name and contact details of the ACA.

To request access to a B/R/P Office, the Project Manger must notify the following details to the ACA, preferably by e-mail:

- Project Manager UserID,
- Project Manager Company Name,
- Project Manager e-mail address,
- Contract Number and Name and other identifying details,
- Location of Contract Works,
- Office of the Principal which is responsible for the contract, or where the Project Manager's point of contact with the Principal is, and if an appropriate B/R/P Office can be identified:
  - B/R/P Office ABN,
  - B/R/P Office Name,
  - B/R/P Office facsimile number.

### **3.6 ACA Creates Link between Project Manager and B/R/P Office**

The ACA is responsible for creating a link between the Project Manager and the B/R/P Office which will be responsible for receiving and paying invoices for insurance premiums for a particular contract managed by the Project Manager. Requirements to create a link between a Project Manager and a B/R/P Office will be identified by

- the Principal's internal project initiating procedures, or
- a request from a Project Manager.

To create a link between a Project Manager B/R/P Office the ACA must notify the following details to the insurance broker, preferably by e-mail:

- B/R/P Office ABN,
- B/R/P Office Name,
- B/R/P Office facsimile number,
- Project Manager UserID,
- Project Manager Company Name,
- Project Manager e-mail address.