

How to take ownership of a team member's risk



HOW TO TAKE OWNERSHIP OF A TEAM MEMBER'S RISK

As shown below you can view a list of all risks you have access to, including relevant risks from your team. In this example, we are 'David Turner' and we want to take ownership of a submission belonging to 'Adriana Szopian'.

Step 1: From the homepage list view, we can click anywhere on the line to open the relevant risk.

UNDERSCORE Adriana Szopian
US Producing Broker

Welcome to Underscore,
the Digital Insurance Platform from McGill and Partners Create a New Quote

Your Risks

All	Draft	Submitted	Quoted	Quote Accepted	Bound	Not Taken Up	Quote Declined	Expired
Filter								
Contract Name	Product Type	Primary Owner	Creation Date	Last Update	Status	Action		
Cargo Insurance Client	Cargo	Adriana Szopian	5 Feb 2024	05 Feb 2024, 13:27	Draft	Clone	Renew	
Cargo Insurance Client	Cargo	David Turner	5 Feb 2024	05 Feb 2024, 12:47	Draft	Clone	Renew	
Cargo Insurance Client	Cargo	David Turner	5 Feb 2024	05 Feb 2024, 12:47	Draft	Clone	Renew	
Cargo Insurance Client	Cargo	David Turner	5 Feb 2024	05 Feb 2024, 12:35	Submitted	Clone	Renew	
terr500	Terrorism	Niakshi Test	5 Feb 2024	05 Feb 2024, 11:54	Submitted	Clone	Renew	
Testing Import export	Cargo	David Turner	2 Feb 2024	02 Feb 2024, 12:56	Draft	Clone	Renew	
ADO 4512 Quote3	Terrorism	Niakshi Test	1 Feb 2024	01 Feb 2024, 08:26	Draft	Clone	Renew	
ADO 4512 Quote2	Terrorism	Niakshi Test	1 Feb 2024	01 Feb 2024, 08:26	Draft	Clone	Renew	
ADO 4512 Quote1	Terrorism	Niakshi Test	1 Feb 2024	01 Feb 2024, 08:25	Draft	Clone	Renew	

Once the risk is opened you will be presented with a 'Read-Only' box relating to the ownership of the quote.

UNDERSCORE

Read-Only

This Quote is read-only because David Turner is the current owner. To edit this Quote, select the Take Ownership button.

[Take Ownership](#)

1. INSURED DETAILS

*Insured's Name
Cargo Insurance Client

*Line Address
316 Insurance Lane

*City
Phoenix

*State
KS - Kansas

*Zip
316

*Country
USA

HOW TO TAKE OWNERSHIP OF A TEAM MEMBER'S RISK



Step 2: Click on Take Ownership.

The screenshot shows the UnderScore web interface. At the top, the logo and user name 'Adriana Scipian, US Producing Broker' are visible. A 'Read-Only' warning box states: 'This Quote is read-only because David Turner is the current owner. To edit this Quote, select the Take Ownership button.' The 'Take Ownership' button is highlighted with a red border. Below this, the '1. INSURED DETAILS' section contains fields for Insured's Name (Cargo Insurance Client), Line Address (316 Insurance Lane), City (Phoenix), Zip (316), State (KS - Kansas), and Country (USA). A 'Surplus Lines Risk?' checkbox is also present. The '2. BUSINESS OVERVIEW' section includes Contract Start Date (02/22/2024), Contract End Date (02/22/2025), a description field, a website field, and an interest type selector with icons for various risk categories.

Step 3: Click on 'Accept'.

IMPORTANT: Please note that by taking ownership you will become the quote primary user and any changes which have not been saved will subsequently be lost. Always check with the current Primary User that they are not working on this submission before accepting.

This screenshot shows the same UnderScore interface as the previous one, but with a 'Take Ownership' modal dialog box open. The modal contains the text: 'Quote last modified by David Turner at 05 February 2024, 12:47 UTC. In order to edit the questionnaire and become the Quote Primary User, please select the Accept button below. If you do not wish to edit the quote, select Back to return to the previous screen.' The 'Accept' button is highlighted with a red border and an orange arrow points to it from the text in the previous block. The 'Back' button is also visible.



HOW TO TAKE OWNERSHIP OF A TEAM MEMBER'S RISK

Step 4: You are now the owner of the risk.

If taking ownership of a submission in 'Draft' status you will be prompted to fill in the required fields on the questionnaire, before submitting.

The screenshot shows the UnderScore questionnaire interface. At the top, the logo 'UNDERSCORE' is on the left and the user name 'Adriana Szoplin, US Producing Broker' is on the right. A 'SAVE' button is visible. The form contains several fields with red error messages:

- * State:** A dropdown menu with a red border and the message 'Error: State is required.'
- * Country:** A dropdown menu with 'USA' selected.
- * License No:** A text input field with a red border and the message 'Error: License No is required.'
- * State of Filing:** A dropdown menu with a red border and the message 'Error: State of Filing is required.'
- 2. BUSINESS OVERVIEW** section:
 - * Contract Start Date:** A date picker with a red border and the message 'Error: Contract Start Date is required.'
 - * Contract End Date:** A date picker with a red border and the message 'Error: Contract End Date is required.'
 - * Description of business and of the Interest to be Insured:** A text area with a red border and the message 'Error: Description of business and of the Interest to be Insured is required.'
 - Website:** A text input field with a red border and the message 'Error: Website is required.'
 - * Interest Type:** A grid of icons representing different industries. The 'Lumber' icon is highlighted with a blue border, indicating it is the selected interest type.

Step 5: To test the new ownership, you can navigate back to the list view by clicking on Underscore in the top left of the screen.



This screenshot is identical to the one above, showing the UnderScore questionnaire form with the same red error messages and the 'Lumber' icon selected under 'Interest Type'. It illustrates the state of the form before navigating back to the list view.



HOW TO TAKE OWNERSHIP OF A TEAM MEMBER'S RISK

Step 6: As shown below, Adriana now owns the record (previously owned by David).

The screenshot shows the Underscore web application interface. At the top, the logo 'UNDERSCORE' is on the left, and the user's name 'Adriana Szopian, US Producing Broker' is on the right. Below the header, there is a welcome message: 'Welcome to Underscore, the Digital Insurance Platform from McGill and Partners' and a 'Create a New Quote' button. The main section is titled 'Your Risks' and features a table with various risk records. The first row is highlighted with a red border, indicating it is the current record being discussed. The table columns include Contract Name, Product Type, Primary Owner, Creation Date, Last Update, Status, and Action.

All	Draft	Submitted	Quoted	Quote Accepted	Bound	Not Taken Up	Quote Declined	Expired
Filter								
Contract Name	Product Type	Primary Owner	Creation Date	Last Update	Status	Action		
Cargo Insurance Client	Cargo	Adriana Szopian	5 Feb 2024	05 Feb 2024, 13:27	Draft	Clone	Renew	
Cargo Insurance Client	Cargo	David Turner	5 Feb 2024	05 Feb 2024, 12:47	Draft	Clone	Renew	
Cargo Insurance Client	Cargo	David Turner	5 Feb 2024	05 Feb 2024, 12:47	Draft	Clone	Renew	
Cargo Insurance Client	Cargo	David Turner	5 Feb 2024	05 Feb 2024, 12:35	Submitted	Clone	Renew	
terr500	Terrorism	Nilakshi Test	5 Feb 2024	05 Feb 2024, 11:54	Submitted	Clone	Renew	
Testing Import export	Cargo	David Turner	2 Feb 2024	02 Feb 2024, 12:56	Draft	Clone	Renew	
ADO 4512 Quote3	Terrorism	Nilakshi Test	1 Feb 2024	01 Feb 2024, 08:26	Draft	Clone	Renew	
ADO 4512 Quote2	Terrorism	Nilakshi Test	1 Feb 2024	01 Feb 2024, 08:26	Draft	Clone	Renew	
ADO 4512 Quote1	Terrorism	Nilakshi Test	1 Feb 2024	01 Feb 2024, 08:25	Draft	Clone	Renew	

McGILL
AND PARTNERS