

HBCF Builders Self Service Portal User Guide

V1.2 September 2022



icare Overview	3
Builder Self Service Portal (BSSP) Overview	3
How to register for BSSP access	3
How to log in to the Builders Self Service Portal	3
BSSP Dashboard	5
Builder Details	11
Claims Quoting System	11
How it works	12
How to access the Claims Quoting System on the BSSP	12
How to register interest in a job	13
Pricing (Premium) calculator	13
Policies	15
How to view policies	15
Filter or Sort Policies	16
Viewing a Policy	17
Export Policies	18
Submit a new policy	18
Download a copy of the policy submission	23
Save draft policy submission	25
Refer an application to a Distributor	25
Cancelling a policy submission	26
Complete a job	26
What happens after a job is closed?	29
Building Contract Review Program (BCRP)	30
Request a BCRP quote	30
Accept a BCRP provider quote	31
Reject a Quote	33
Upload BCRP Documents	34
View BCRP Projects	35



	Mark a review as ready to proceed	37
N	lanage BSSP User Details	38
С	ontact	39
L	og Out	39
Τ	rouble Shooting	40
	Unable to access the BSSP	40
	Browsers	40
	Logging in	40
	Login fails after Sole Trader transfer	40
	Unable to complete a Job	40
	Address validation error when submitting an application	40
	Address validation error when closing a job	4
	Forgotten Password – standard user only	42
	Unable to close/complete a BCRP project	42
	Frror	1



icare Overview

Insurance and Care NSW (icare) was created in September 2015 through the commencement of the State Insurance and Care Governance Act. icare is a Public Financial Enterprise governed by an independent Board of Directors that delivers insurance and care services to the people of New South Wales. The NSW Self Insurance Corporation (SICorp), Home Building Compensation Fund (HBCF) along with other like agencies such as the Workers Compensation Nominal Insurer, Lifetime Care and Support, Sporting Injuries Compensation and the Dust Diseases Authority have joined icare. The Home Building Compensation Fund (HBCF) provides a safety net for consumers who have contracted for home building works and whose builder has been unable to honour their commitments due to insolvency, death, or disappearance. The safety net is also provided where a contractor's licence has been suspended for failing to comply with a tribunal order to pay compensation to the homeowner.

Builder Self Service Portal (BSSP) Overview

The BSSP was developed to allow builders to monitor and manage their NSW Home Warranty eligibility and HBCF policies online.

Builders can access the BSSP to:

- View eligibility assessment results (see note below)
- View and download the latest certificate of eligibility
- View next scheduled eligibility assessment
- View a summary of current projects (open job limits)
- View a snapshot of the open job value
- Get a quote on future insurance premiums which includes the builder's premium weighting
- View current certificates of insurance.
- Close completed jobs

How to register for BSSP access

To access the BSSP contact HBCF or your broker and request access. New builders can also request access via the Eligibility Assessment and Builder Profile change form.

There are two levels of user access: **manager** and **clerical**. Portal managers manage your company's access and also have access to the business' pricing and profile information. Clerical users will be able to carry out policy functions without having access to profile and pricing information.

Builders must first nominate a person to act as BSSP portal manager for their organisation. HBCF will require the Portal managers contact details: first name, last name, email address, and a mobile phone number.

Registration to the portal begins when the portal manager receives a notification email from icare hbcf and follows the activation link in that email. The link takes the user to a portal registration wizard. Once the portal manager is registered and logged in they can invite and manage other users from the company.

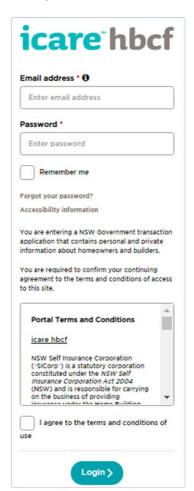
How to log in to the Builders Self Service Portal

- 1 Visit the icare website and select the Login button
- 2 Select the HBCF Builders Portal link





3 Enter your email address and password and accept the terms and conditions and select Login.

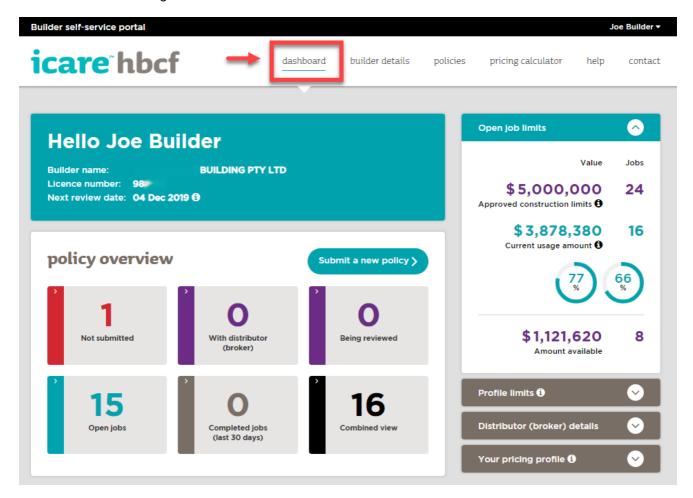




BSSP Dashboard

The dashboard is the home page of the BSSP. When you first log in it opens automatically. It displays a snapshot of your data organised into panels.

Dashboard Portal Manager view



The dashboard differs by user type, i.e. Portal Manager or Clerical User.

Portal manager: User and builder details, Policy Overview, Open Job Limits, Profile Limits, Distributor (broker) details, Pricing Profile

Clerical user: User and builder details, Policy Overview, Open Job Limits, Distributor (broker) details. Note the Clerical User does not get access to the builder's eligibility profile limits and pricing profile

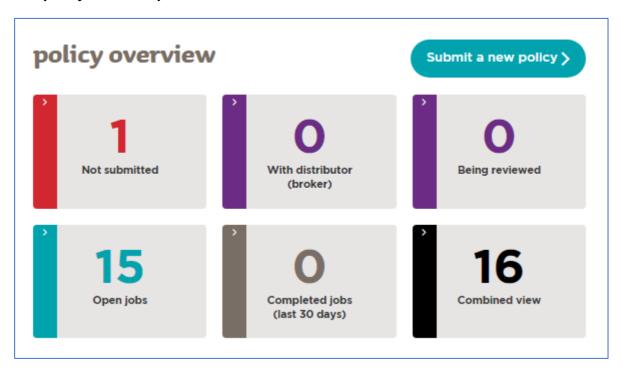


The Builder Details panel



The Builder Details panel displays: the username of the builder logged in to the portal, the registered name and licence number of your building entity, and the next eligibility assessment review date if a review has been scheduled. If no review has been scheduled "Not scheduled" is displayed. If a review is not required "Not required" is displayed.

The policy overview panel



The policy overview panel presents a summary view of the policies you have with HBCF, the policies are filtered by policy status to make it easier to browse the policies.

Policy Status	Description
Not submitted	This is the current count of policies you have saved as a draft but are yet to submit. Click in the box to open a display of policies with that status.
With distributor (broker)	This is the current count of policies you have referred to your Distributor (Broker) for completion and submission. Click in the box to open a display of policies with that status.



Policy Status	Description
Being reviewed	This is the current count of policies that you have been submitted and which are being reviewed by an underwriter. Click in the box to open a display of policies with that status.
Open jobs	This is the current count of policies that have been approved and for which Certificates of Insurance have been issued. Click in the box to open a display of policies with that status.
Completed jobs (last 30 days)	This is the current count of projects that were completed in the last 30 days. Click in the box to open a display of policies with that status.
Combined view	All of your policies. Click in the box to open a display of all your policies.

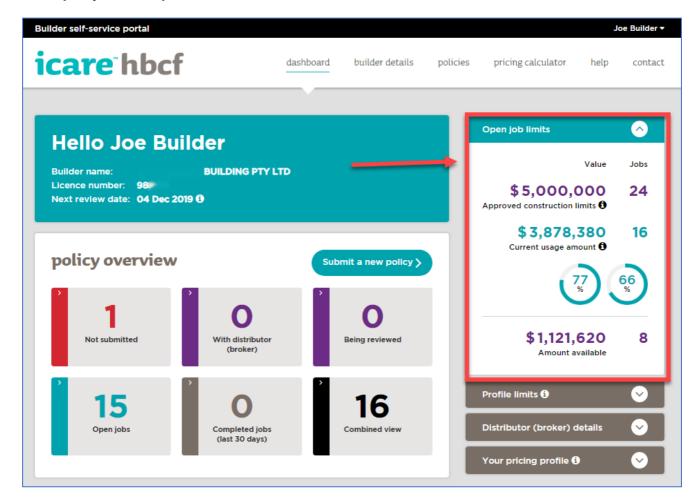
Note: If you have nine or less approved jobs in your open job limits, the policy overview is displayed in a $\underline{\text{list}}$ $\underline{\text{format}}$.

The Policy Overview list:

•	
Customer Name	This is the home owner name you supplied when you created the policy.
Job Number	This is your internal reference number for the job being insured. It is your choice whether you use this field or not.
Policy/Transaction number	The transaction number is the system generated reference number for the policy. For open jobs or completed jobs, the policy number is displayed.
Site address	This is the site address you supplied when you created the policy.
Status	This is the current status of the policy. The view buttons are colour coded by status



The Open job limits panel



The open job limits panel displays:

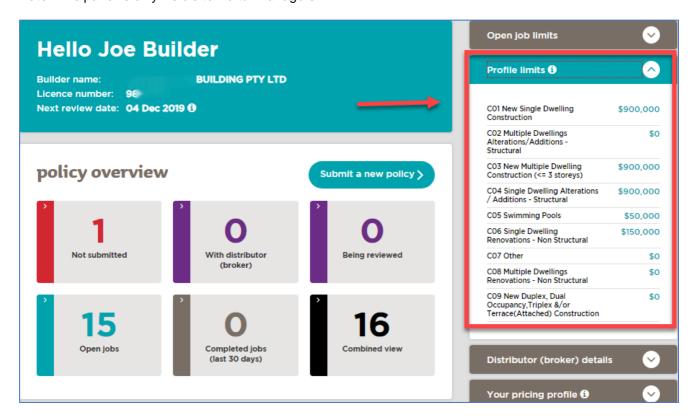
- your approved construction limits in contract value and the number of approved jobs
- your current usage amount in contract value and number of active jobs
- a graphic representing the percentage usage for contract value and number of jobs (more than 80% displays in red)
- the available balances before your limits are met or exceeded.



The Profile limits panel

The Profile limits panel displays the construction types and dollar value of the buildings you have eligibility to build and is based on your eligibility assessment.

Note. This panel is only visible to Portal Managers.



The Distributor details panel

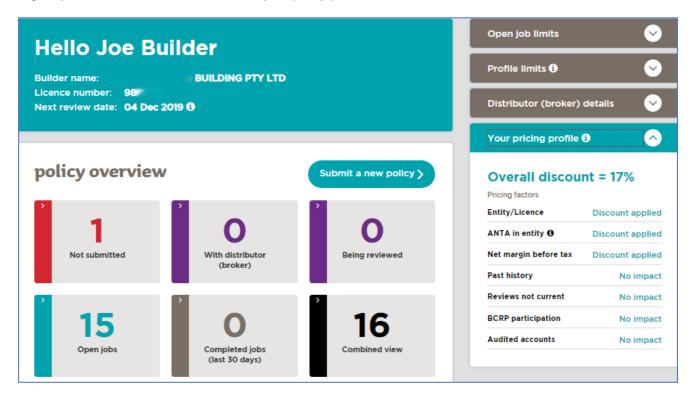
Displays the contact details for your currently registered distributor (broker).





The Pricing profile panel

The pricing profile panel displays your pricing profile based on your eligibility assessment. The builder's eligibility assessment is used to calculate your policy premiums.

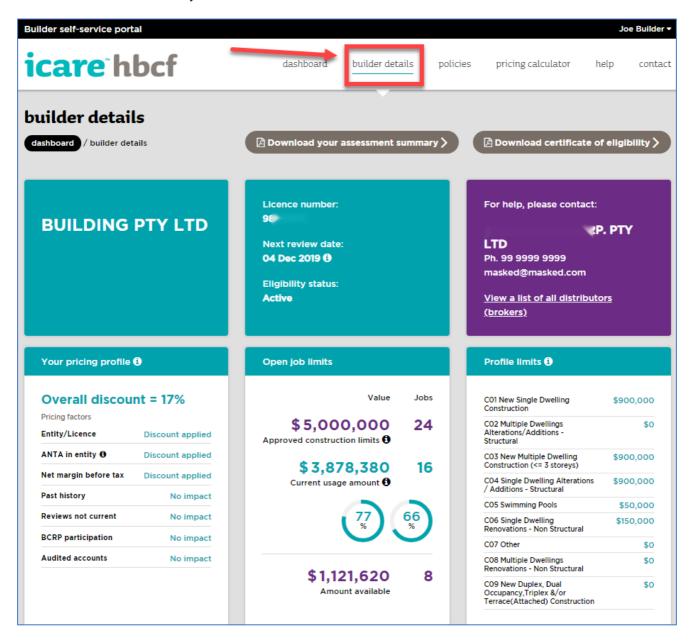


Note. This panel is only visible to portal managers.



Builder Details

The builder details page contains a comprehensive overview of the builder's entity details including: the entity name, entity details, distributor's contact details, pricing profile, open job limits, profile limits, approved eligibility history, next scheduled review, eligibility status and limits and downloadable copies of the certificate of eligibility and last assessment summary.



Note The builder details page can only be accessed by the portal manager.

Claims Quoting System

The HBCF Claims Quoting System (CQS) displays available jobs arising from a current HBCF claim. Through the CQS eligible Builders can register their interest in tendering to complete available jobs. The CQS is a standalone HBCF system which is usually accessed through the icare HBCF public page but can now also be accessed through the BSSP.

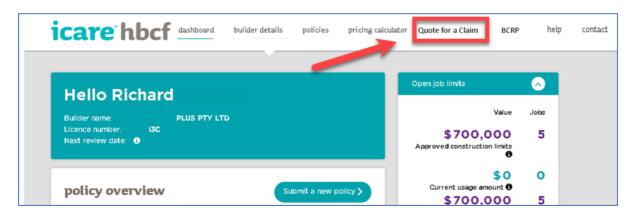


How it works

- CQS displays jobs arising from a HBCF claim
- If interested in tendering the builder can register their interest in the available job
- The system evaluates the builder and shortlists that builder if they meet the eligibility criteria
- The HBCF claims manager will contact shortlisted builders and ask them to submit a tender (non CQS process)
- Tender submissions are reviewed and acknowledged (non CQS process)
- Homeowner chooses builder (non CQS process)

How to access the Claims Quoting System on the BSSP

1 Select **Quote for a Claim** from the menu

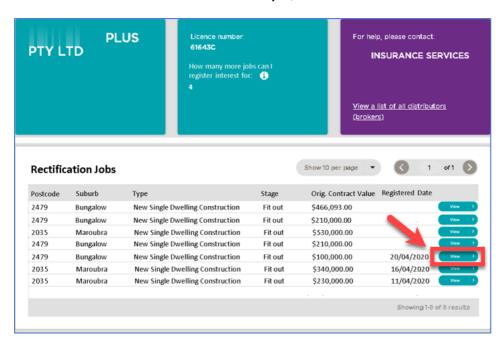


The Quote for a claim page contains the following:

- The builder's name (your entity name), and your broker's details.
- The builder's licence number and the number of remaining jobs that you can register interest in.
- The list of available rectification Jobs.
- The date you registered interest in a job.



2 To view the details of a rectification job, select the *View* button



How to register interest in a job

1 To register interest in the job, select the **Submit** button



- 2 A **Registered Date** column records/displays the date you have registered interest.
- The CQS evaluates the builder's registration of interest. If they meet the job's eligibility criteria they will be shortlisted and contacted by the Claims Manager.

Pricing (Premium) calculator

The pricing calculator provides an accurate quote on an insurance premium.

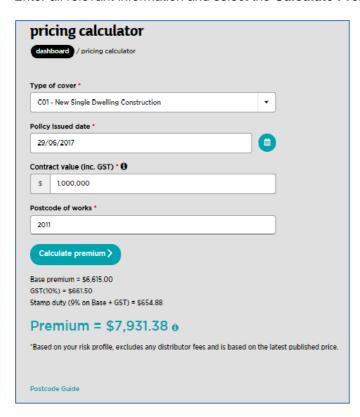
To calculate a premium:

1 Select the pricing calculator tab in the menu bar.





Enter all relevant information and select the Calculate Premium button.



When satisfied with the information you have selected or entered into the calculator fields, select the **Calculate Premium** button.

The Total Premium value is displayed followed by the Base Premium value, the GST applicable, and the Stamp Duty applicable.

If the building is a multi-unit construction then the average premium and tax values per unit are also displayed.

Note the quoted premium does not include the brokers fee.



Policies

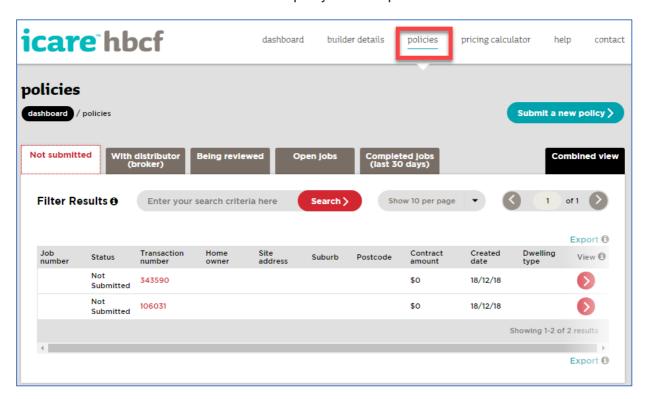
The policies page allows you to manage and view your draft submissions, pending applications, issued policies, and certificates of insurance.

The user can:

- · filter and sort a display of policies
- export the list of policies
- · view the details of a particular policy
- create, save, edit, and submit a new policy submission
- download a certificate of insurance
- mark a job as completed

How to view policies

From the dashboard select a status box on the policy overview panel or select **Policies** from the menu bar.

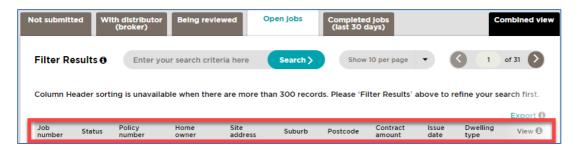


The policies page has six tabs, one for each policy status, and a combined view tab.





All Policies are listed in a table format with each Policy's details listed in a row (see image below).



The policy details displayed for each policy are:

Job number	This is your internal reference number for the job being insured. It is your choice whether you use this field or not.
Status	This is the current status for the policy.
Transaction/ policy number	The transaction number is the system generated reference number for the policy. For open jobs or completed jobs, the policy number is displayed.
Home owner	This is the home owner name you supplied when you created the policy.
Site address	This is the site address you supplied when you created the policy.
Suburb	This is the site suburb you supplied when you created the policy.
Postcode	This is the postcode you supplied when you created the policy.
Contract amount	This is the total amount (inclusive of GST and Stamp Duty) for the contract being insured.
Created date/ Issue date	This is the date on which you first created the policy application. For open jobs or completed jobs, the date when the policy was issued is displayed.
Dwelling type	This is the type of construction for the job.

Filter or Sort Policies

By default, the policies are sorted with the most recent policies displayed first. Each column in the display can be used **to sort** the data displayed in ascending or descending order.

To **sort** a column, select the column header, e.g. Created Date. Note if the current display shows more than 300 records, the Sort function is disabled.

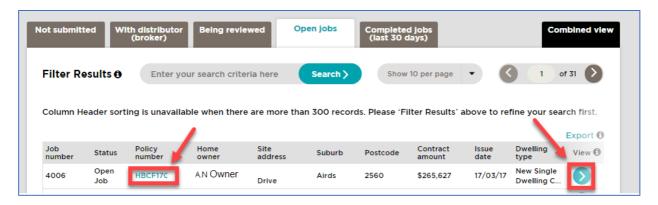


To filter the list of policies, enter part of a Policy Number, Transaction Number, Site Address, or Suburb in the filter bar and select the **Search** button to limit the display of policies to those matching your entered criteria.

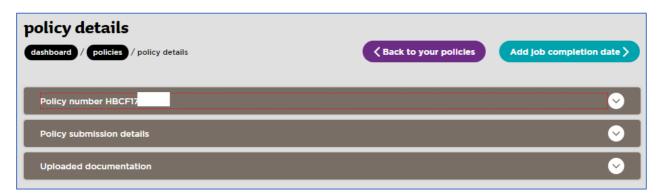


Viewing a Policy

Select the View Policy button or the Policy Number link



When you view a policy, you can view the Policy number, status and date of issue, the certificate of insurance and the policy submission details and any associated uploaded documentation



The **policy number** pane provides details on the listed policy and includes the Certificates of Insurance (COI) issued for that policy.

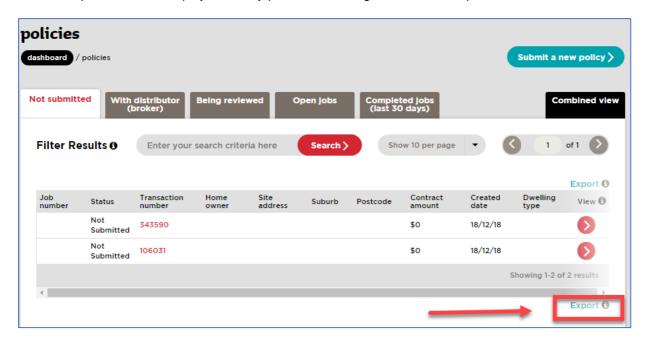
The **policy submission details** pane contains a read-only view of all the builder, owner/developer, finance, and construction details of the project, as they were entered at the time of policy submission.

The **uploaded documentation** pane contains a view of all the documentation that was attached at the time of policy submission. The categories of document include: Building contract, Scope of works, Certificate of title, Project plans, Proof of funding, Builder experience, Insurance proof, Indemnity cover, BCRP document. **Note** if you do not see any of the above listed documents in this pane they will have been submitted by the Distributor through the HBCF Policy Centre system



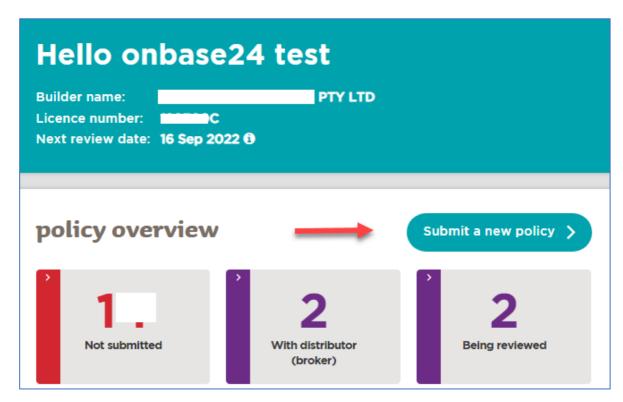
Export Policies

You can export a list of policies in .csv format by selecting the **Export** button. The export function downloads only those policies in your current display. If you have used a filter (e.g. part of a street name) to reduce the number of policies in the display then only policies matching that filter are exported.



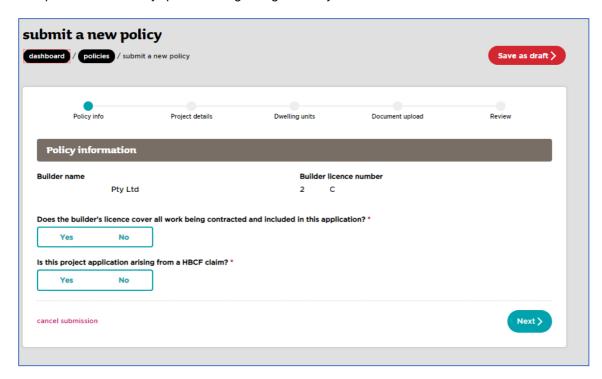
Submit a new policy

To start a new policy application, select the **Submit a new policy** button on the dashboard **or** select the **Policies** tab on the menu bar.



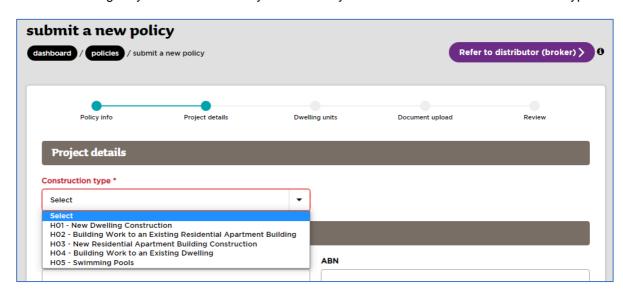


2 Complete all mandatory questions regarding warranty claim and builder's licence



3 Select Construction Type (H01-05)

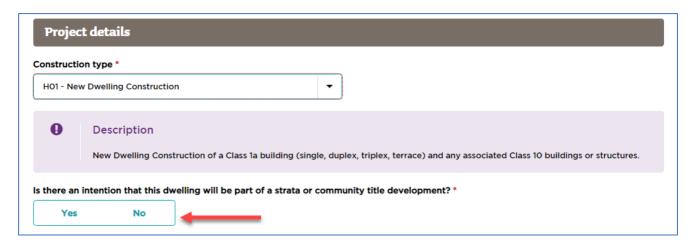
Refer HBCF Eligibility Manual or contact your broker if you need assistance with construction types.



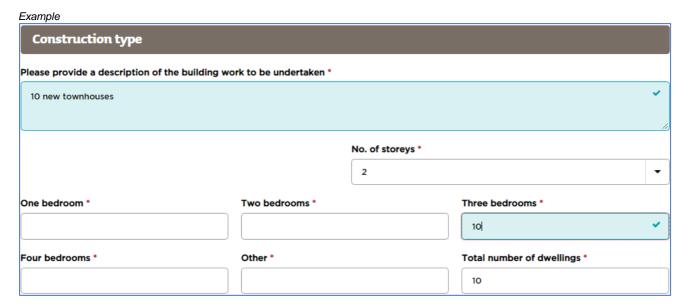


H01 New dwelling Construction

Select H01 for construction of new Class 1a buildings. For example, single dwellings, duplex, townhouses, terraces. For H01 type projects that have more than one dwelling and are subject to strata or community title you have the option to add multiple dwellings in one project submission.



Selecting **Yes** in the title question allows you to add more class 1a dwellings to your submission, e.g. if you have more than one dwelling in the project such as a strata titled duplex or town houses.



Note It is not possible to have separate contract values (build cost) for each dwelling in a H01 submission with multiple dwellings. If you need separate pricing for each dwelling you will have to submit a separate application for each dwelling.

H02 - Building Work to an existing residential apartment building

The H02 category is for structural and non-structural work to common areas of existing class 2 buildings. **H03 - New Residential Apartment Building Construction**

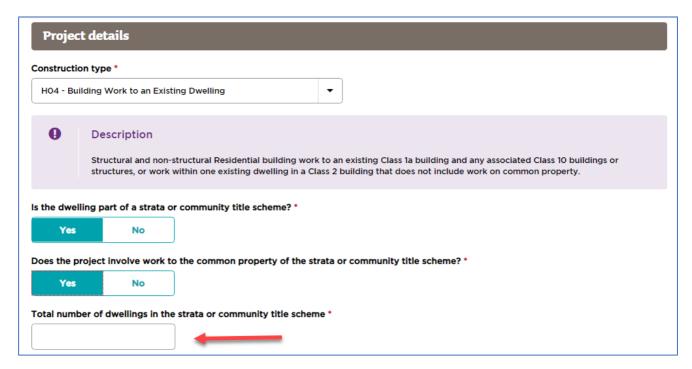
The H03 category is for new construction of Class 2 buildings with 3 or less residential storeys (or a mixed-use building with a Class 2 component with 3 or less residential storeys). H03 also includes new construction of any associated Class 10 buildings or structures when built in conjunction with the new class 2 building.



H04 - Building Work to an Existing Dwelling

The H04 category is for structural and non-structural work to existing class 1a dwellings and category 10 buildings. H04 is also for work to the common property of class 1a dwellings.

H04 also covers work wholly within an existing dwelling/s (unit/apartment) in a Class 2 building (where the scope of work does not include work on common areas of class 2 building which will be covered by H02). For H04 type projects that involve work to the common property of class 1a dwellings you must select the **Yes** button for both the strata/community title and common property questions. This enables the *Total number of dwellings* field.



H05 - Swimming Pools

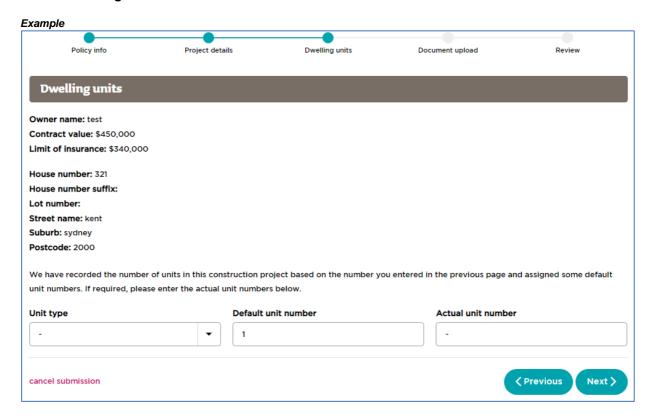
The H05 category is for the construction, renovation, alteration, repair, extension, maintenance, or decorative or protective treatment of a swimming pool associated with a Class 1a or Class 2 building (excluding construction or installation of a swimming pool that will be located within a Class 2 or mixed-use building, such as a roof-top or basement swimming pool).

4 Enter Project details

Enter all Project details including owner/developer, construction type and contract details. Note all fields marked with a red asterisk* are mandatory fields.



5 Review **Dwelling Units** details



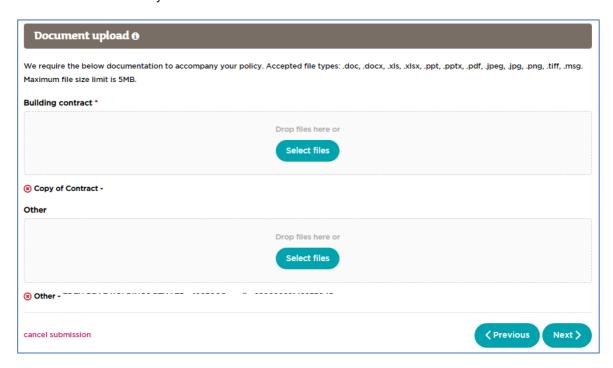
6 Upload Documents

The Construction Type(H01-H05), you select determines the type of documents you are required to submit in the application. An application cannot proceed if a required document is not provided (uploaded). Examples of required documents are: signed Building contract, Scope of works, Certificate of title, Project plans. The file types you are permitted to upload include: .zip, .pdf, .doc(x), .jpeg, .jpg, .png, .tiff, .mpp, and .xls(x). The maximum file size upload is **5mb**.

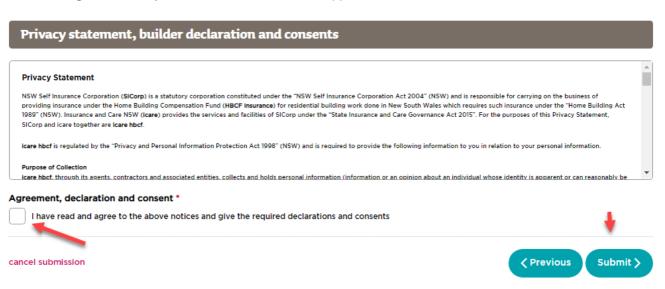
To upload a file, select the **Select Files** button and navigate to the correct file and select and upload it. Or use the drag & drop method by locating the file in your file management application and drag the



file icon into the correct area of the **Document Upload** page. The uploaded file name is listed adjacent to a delete icon in case you later wish to remove the file.



- 7 Review the application before submitting
- 8 Read and Sign the Privacy statement and Submit the application



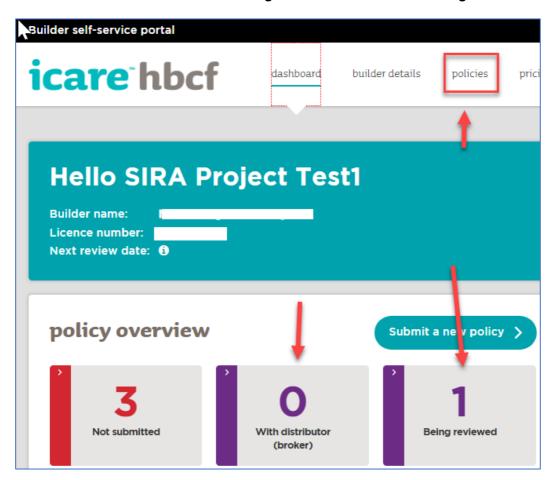
Once you have submitted an application it gets checked for any underwriting issues. If it passes the review it gets forwarded to your HBCF broker for processing. If there are any problems with the application it will be reviewed by a HBCF underwriter.

Download a copy of the policy submission

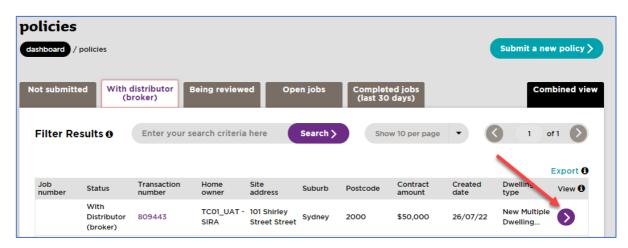
Note if you have a BCRP condition on your eligibility the BCRP provider will ask you for a copy of the project details.



From the Dashboard select the **Policies** menu tab or directly select the **With Distributor** tab. **If the submission was referred to a risk manager for review select the r Being Reviewed** tab.

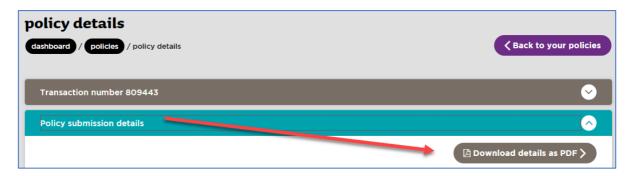


2 Select the Policy Details View Arrow





3 Select Policy Submission Details view and download



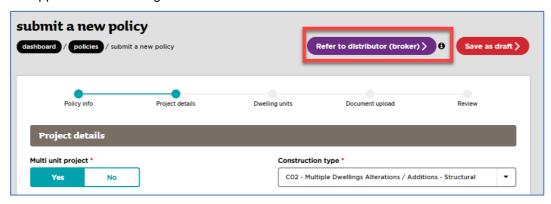
Save draft policy submission

If required you can save your application in progress as a **draft**. The draft policy can be accessed later for completion via the **Not submitted** display.



Refer an application to a Distributor

If you need assistance in applying for the certificate of insurance you can refer the application to your distributor. If you do so you will no longer be able to edit the submission but can view it in the *Policies* view under the **With distributor** tab. When an application is referred to a Distributor they are notified by email that the application is awaiting review.





Cancelling a policy submission

You can only cancel a draft policy submission (application) in the BSSP if you have not yet submitted the application. To cancel a submission, open the **policy** you wish to cancel and select the **cancel submission** button.

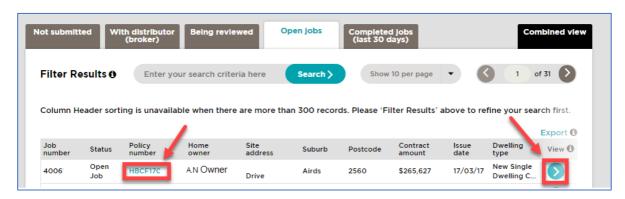


This option is only available on the **policy** page and allows you to cancel the submission and return to the policies display. Note Policy applications that progress beyond the first page but are not completed will accumulate in your **Not Submitted** display. To remove the submissions you wish to cancel, contact your distributor and advise them of the transaction numbers of those submissions.

Complete a job

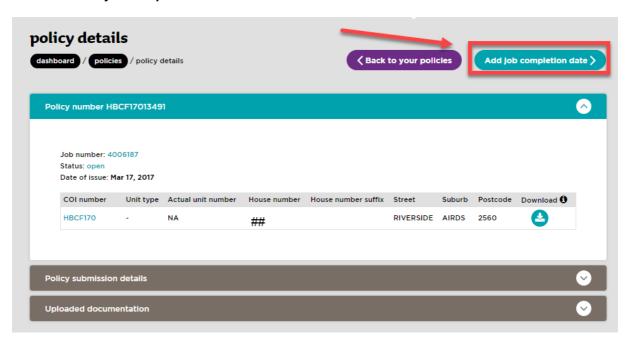
Builders can close completed jobs on the BSSP.

To complete a job, select the **Open Jobs** tab in **Policies** view and **open** the job/policy you wish to complete.





2 Select the **Add job completion date** button



3 Choose **Yes** from the practical completion question. You can only choose **NO** if there are outstanding exceptions as to why the incomplete job should be closed. Please refer to your Distributor (broker).



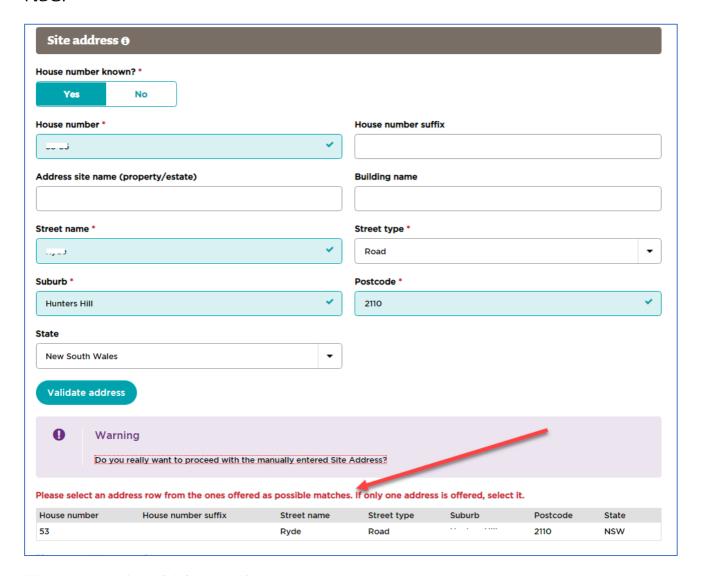


Answer all mandatory questions in the completion form and select the **Submit** button. A confirmation of completion view opens.



Note if you cannot validate the address you will not be able to complete the job. If this is the case please check and update the address in the current site address section. If you continue to get an address validation error it is usually because the address has not been registered on the land property registration system and you will need to ask your broker to close the job for you.





What happens after a job is closed?

The Owner, the Distributor, and the key Business Contact are alerted by email that a Job Completion date has been submitted. The warranty period of the policy commences its six-year countdown. The builder's total number of jobs and total value of contracts is adjusted to allow them to commence new jobs.



Building Contract Review Program (BCRP)

The BCRP is a transitional program that helps residential builders in NSW take on new or larger, more complex projects. The BCRP is a mentorship program that is overseen and managed by HBCF. It is delivered to builders by nine authorised service providers. These service providers are responsible for reviewing builders' ability to quote and deliver particular projects as well as provide mentoring.

As part of the BCRP program, service providers:

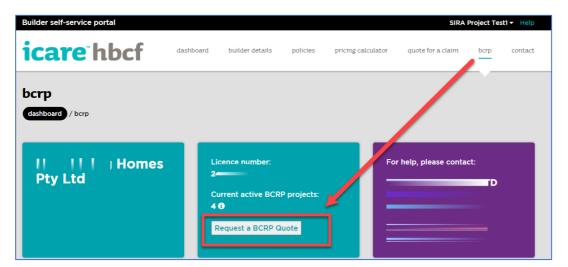
- Review contract documents for a project to ensure that the builder provides a detailed budget that includes a gross margin that is reasonable for the project type, size, value and other project requirements.
- Determine a schedule of performance reviews, including site inspections, to ensure supervision and contract administration is appropriate.
- Make sure the project is running to budget and contracted completion date.
- Undertake reviews and report on the progress or development of the builder's competence relating to specific areas that have been reviewed.

Via the BSSP, Builders on the BCRP program can request quotes from a provider for a project, view their BCRP projects, and also view and download any associated BCRP project documents/files.

Request a BCRP quote

Note the project must be in our systems for it to appear in the BCRP quote view, i.e. the builder must have submitted the project application (via BSSP or via their broker)

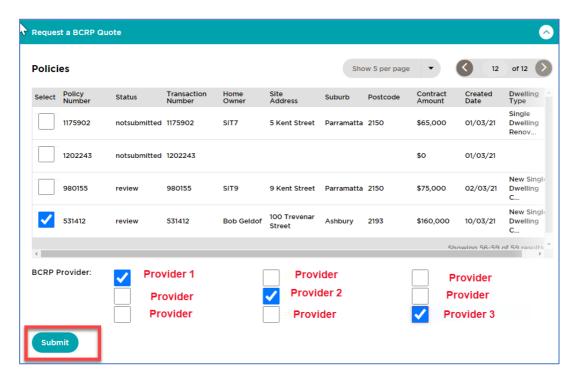
1 Open the BCRP view and select the *Request a BCRP Quote* button.





HBCF

- 2 Select the **project** you wish to request a quote for.
- 3 Select the **BCRP providers** you wish to quote for the project.
- 4 Submit.



Accept a BCRP provider quote

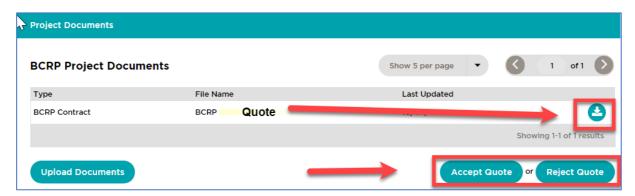
When a builder submits a *Request for Quote* the BCRP provider is notified and they will prepare a quote for the project. Once they have submitted the quote the project's status is updated to *Quote*. Note the quote will be in the form of a *BCRP Agreement* which you will be required to sign and return to the BCRP provider.

1 To view the quote and accept or reject it select the *View* button.

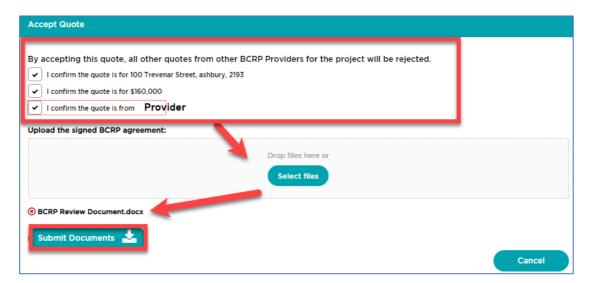




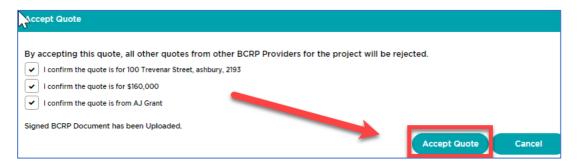
2 Download the quote (agreement) to review and select either **Accept Quote or Reject Quote** once you have made your decision.



If you accept the quote you must select all of the check boxes to confirm and upload a signed copy of the BCRP Agreement for this project. Note once you have uploaded the agreement you must select the **Submit Documents** button to complete the upload.



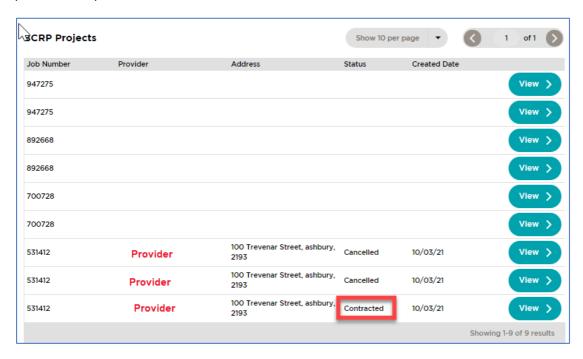
4 Select the **Accept Quote** button to accept the quote.





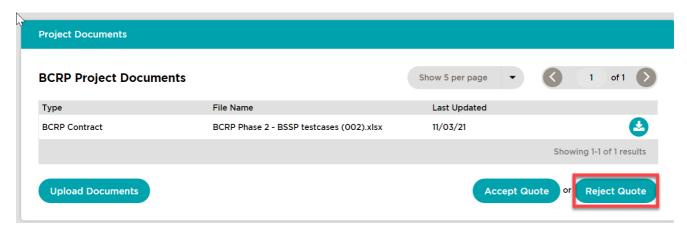
Note once the builder accepts the quote they are contracted with that provider for the project.

The project status of the successful provider is updated to contracted. The project status for the unsuccessful providers is updated to cancelled.



Reject a Quote

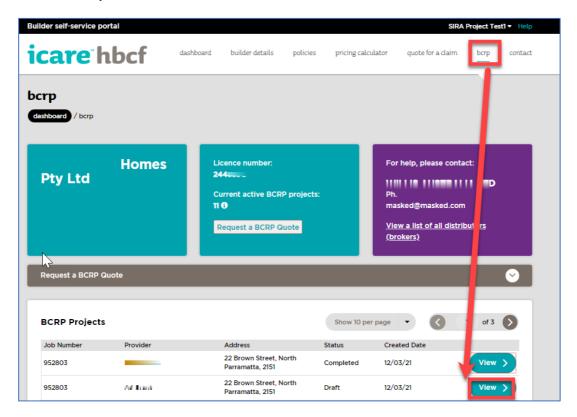
- 1 Select the **BCRP** tab to view your BCRP projects
- 2 Select the relevant project's *View* button.
- To review the quote, download the quote in the Project Documents pane.
- To reject a quote, select the **Reject Quote** button. Note if you have accepted a different quote this step is not necessary.



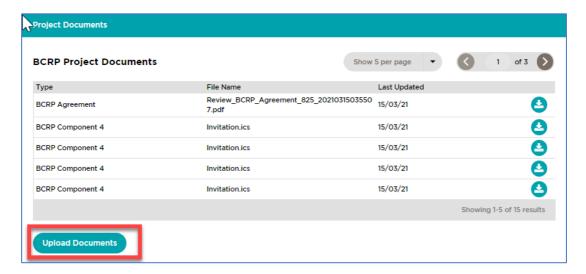


Upload BCRP Documents

- Open a BCRP project.
 - Select the BCRP tab
 - Select the Project View button

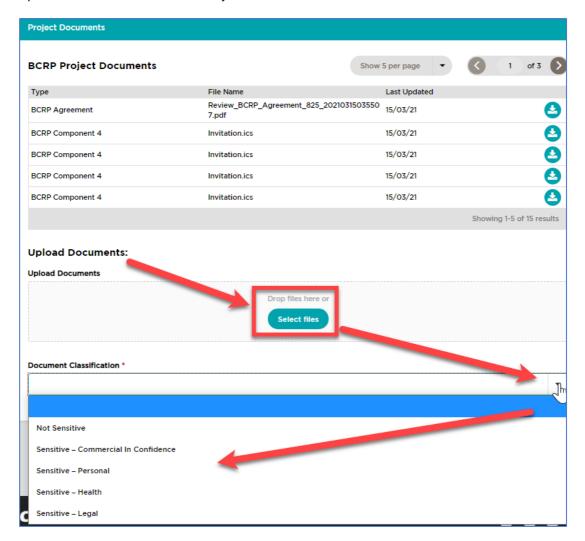


2 Select *Upload Documents* in the Project Documents pane.





3 Upload the relevant file and classify the document.



Refresh the page to view the uploaded document

View BCRP Projects

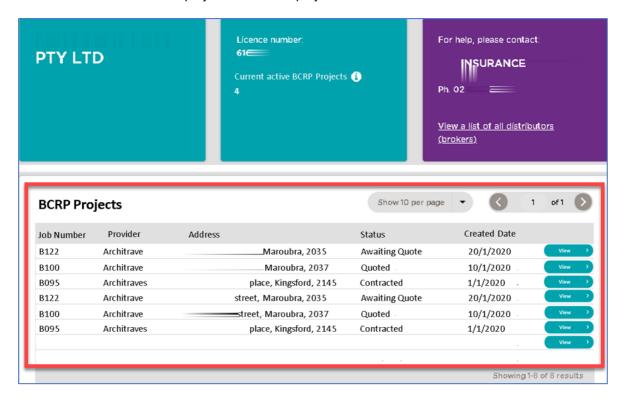
1 To view BCRP projects select the **BCRP** tab on the menu bar



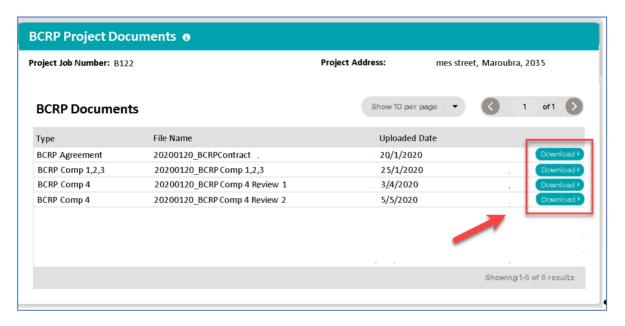
The BCRP tab displays any projects the builder currently has in the BCRP program and also displays who the BCRP provider is for that project and the status of that project.



2 Select the *View* button on a project to view the project's BCRP documents/files.



3 Select the **Download** button on a project to view a BCRP document.



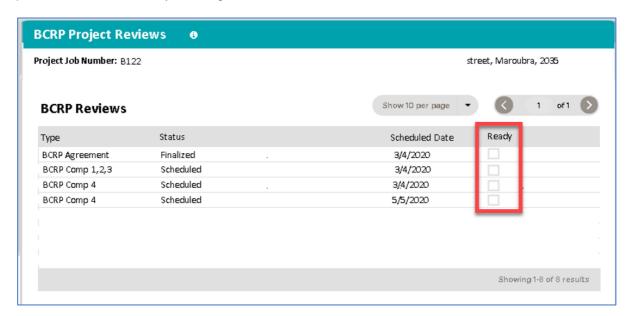


Mark a review as ready to proceed

Select the BCRP tab to view your list of BCRP projects and select the relevant project *View* button – a list of reviews is displayed



The builder selects the relevant review box to mark it as ready to proceed. This notifies the BCRP provider who will contact you to organise the review.





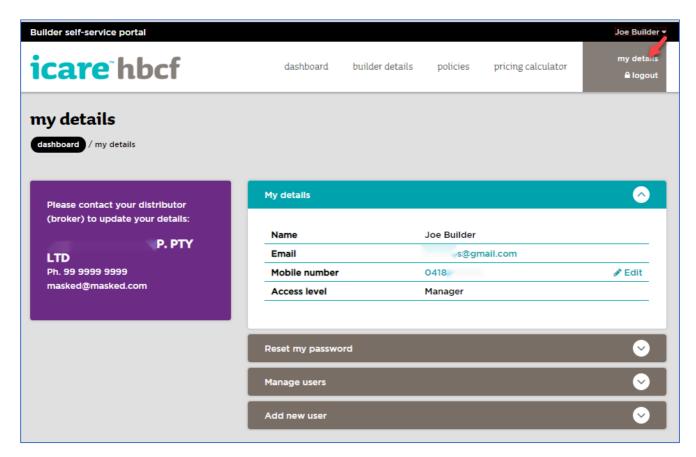
Manage BSSP User Details

On the My Details page you can:

- · view your distributor's contact details
- manage your details
- reset your password
- add new users (you can have multiple users with manager access)
- manage other users if you are the portal manager.

Users with Manager access can: add new users from your business, edit the access level of existing users, and deactivate users. If a user has been deactivated and needs to be reactivated they will have to be added as a new user again.

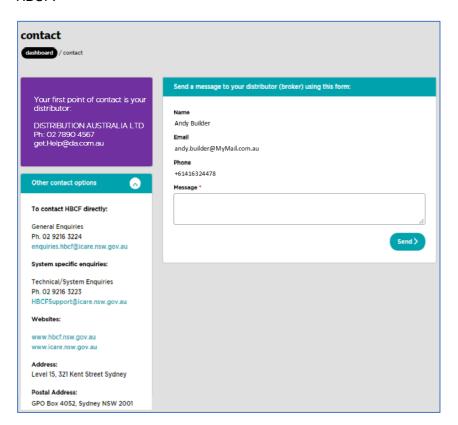
To access the **My Details** page, select your **login name** in the top right of the portal and select **my details** from the menu.





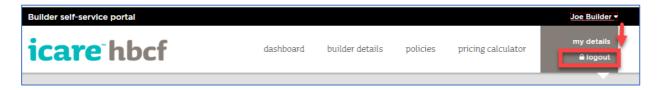
Contact

The contact page is provided to assist you to communicate with your distributor or, if necessary, with icare HBCF.



Log Out

To log out of the BSSP go to your username on the portal menu bar and select ${\bf logout}$





Trouble Shooting

Unable to access the BSSP

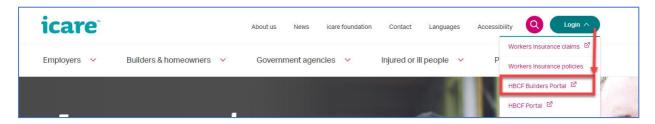
If the *Forgot My Password* link does not work you may not have activated your account. You have 24 hours to activate your access to the BSSP after receipt of the registration email. If you do not activate your access within 24 the registration key expires. If this happens please contact hbcfsupport@icare.nsw.gov.au to reissue the activation email.

Browsers

We recommend Chrome .

Logging in

When logging in ensure you are accessing the correct portal (refer to - How to Log in)



Login fails after Sole Trader transfer

Contact hbcfsupport@icare.nsw.gov.au

Unable to complete a Job

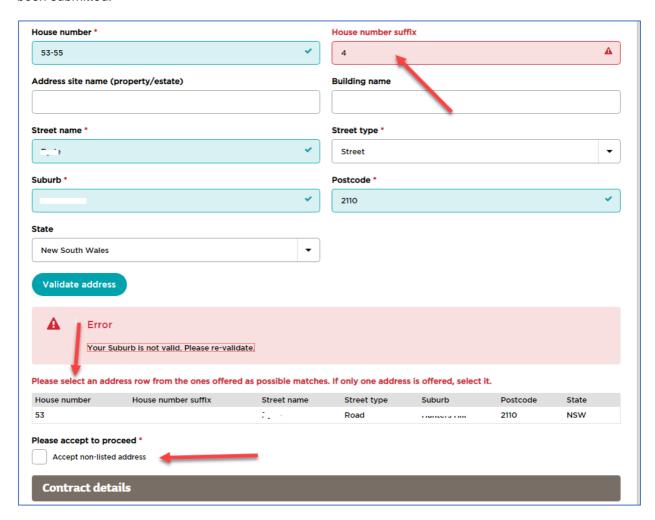
If the site address has changed from when the original submission was made you may not be able to complete a job. If so contact hbcfsupport@icare.nsw.gov.au

Address validation error when submitting an application

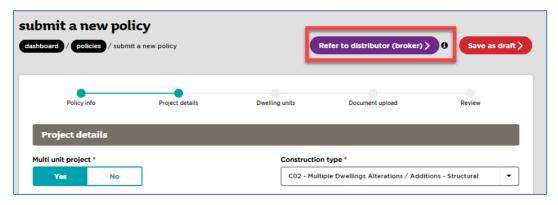
If you cannot validate a site address you will not be able to submit the application. Check and update the address if required. If you continue to get an address validation error the BSSP may offer you a possible



match, Select this address and ask your broker to update the address manually once the application has been submitted.



If the BSSP does not offer you a possible match you will have to refer the application to your Broker for processing.



Address validation error when closing a job

If you cannot validate the site address you will not be able to complete the job. Check and update the address in the current site address section. If you continue to get an address validation error it is usually because the address has not been registered on the land property registration database and you will need to ask your broker to close/complete the job for you.



Forgotten Password - standard user only

If a clerical user (non portal manager) has never activated their account after the portal manager has sent the activation email, the *Forgot my password* link will not work. Therefore, the portal manager will need to resend a new activation email to the sub user.

Unable to close/complete a BCRP project

If components 4 and 5 of a BCRP project have not been completed you will not be able to close/complete that job. If the BCRP provider has not completed components 4 and 5 contact them to discuss.

Error

If you get an error message such as the example below at any time when using the BSSP you will need to contact HBCF Support.

