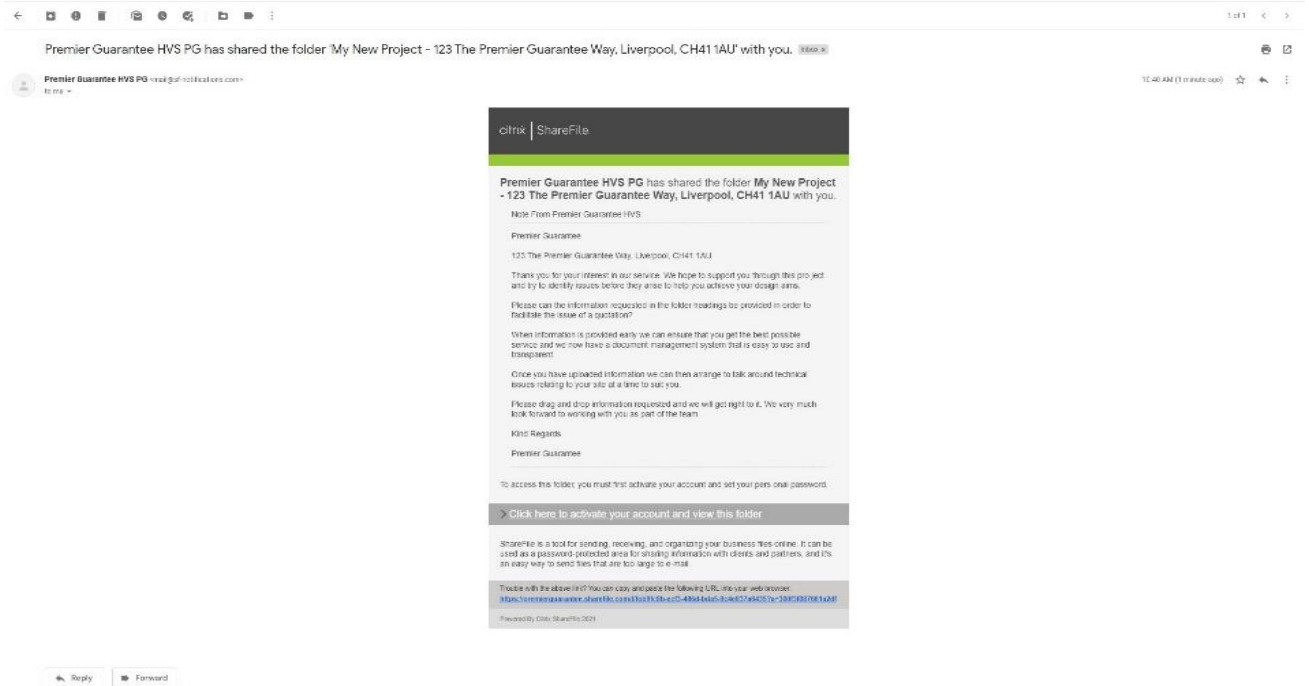


An important aspect of our process is the creation of the audit trail necessary for risk management of complex schemes. As document control is critical to the success of the project, ShareFile – a third-party, file sharing and transfer service – must be used to submit information to us for review. This document explains how to use the software.

ShareFile has folders which mirror the Design Review Report, Certificate Progress Report and Key Inspection Plan. Links are provided within these documents to make it easy to upload information.

Advantages of using ShareFile

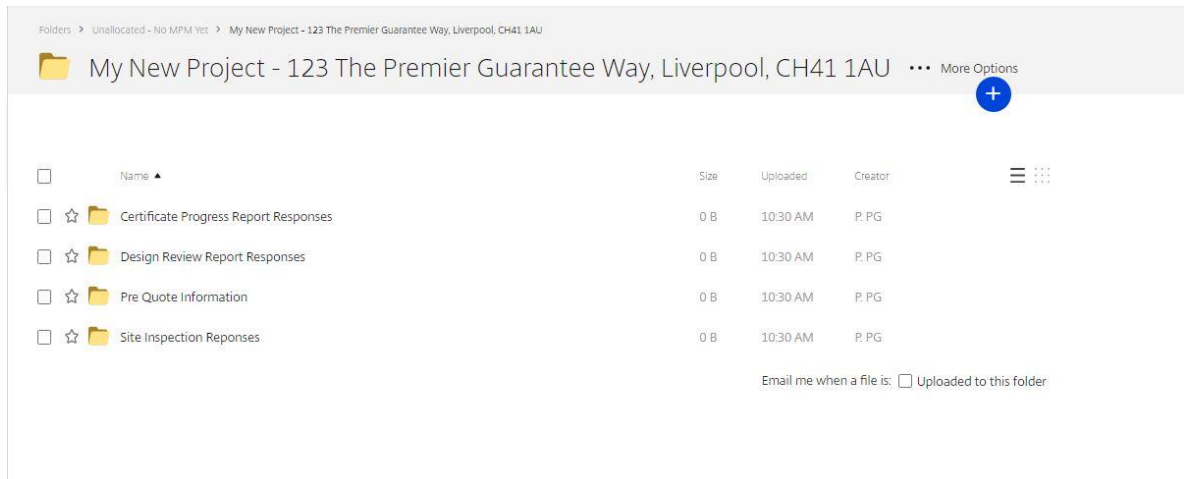
- Clear, transparent audit trail to ensure you know what information has been submitted to answer a specific query
- Information submitted does not expire and is held permanently on file
- Documents are automatically revisioned when uploaded, making it clear which submission is the latest iteration



1. You will receive an email from ShareFile to gain access to your project. Click the link to activate your account and view the folder.

The form is titled "ShareFile" and includes a welcome message: "Welcome! Please confirm your personal information." It contains three input fields: "First Name" (with a red asterisk and "Required" label), "Last Name" (with a red asterisk), and "Company". The "First Name" field contains the text "Valued", "Last Name" contains "Customer", and "Company" contains "New Project Organisation". A blue "Continue" button is at the bottom.

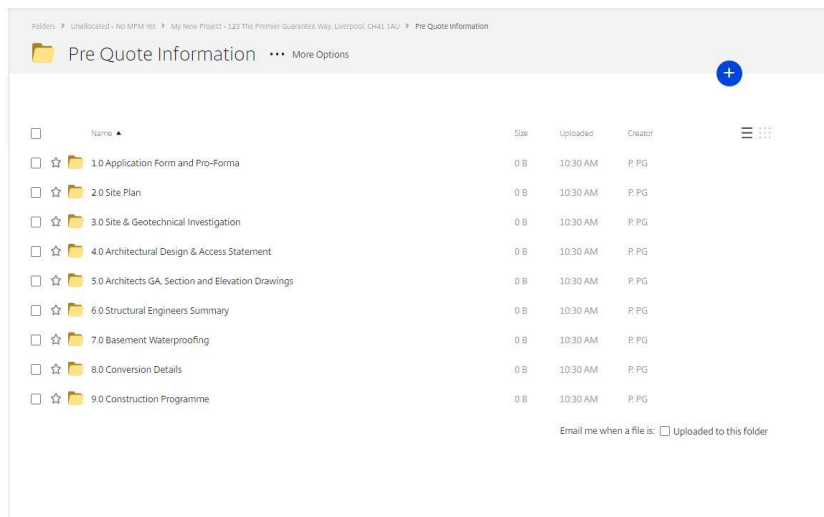
2. You will be taken to a screen to confirm your name and organisation.



3. Once information is confirmed, you will be provided with access to the ShareFile. Each folder is relevant to different phases and aspects of the project.

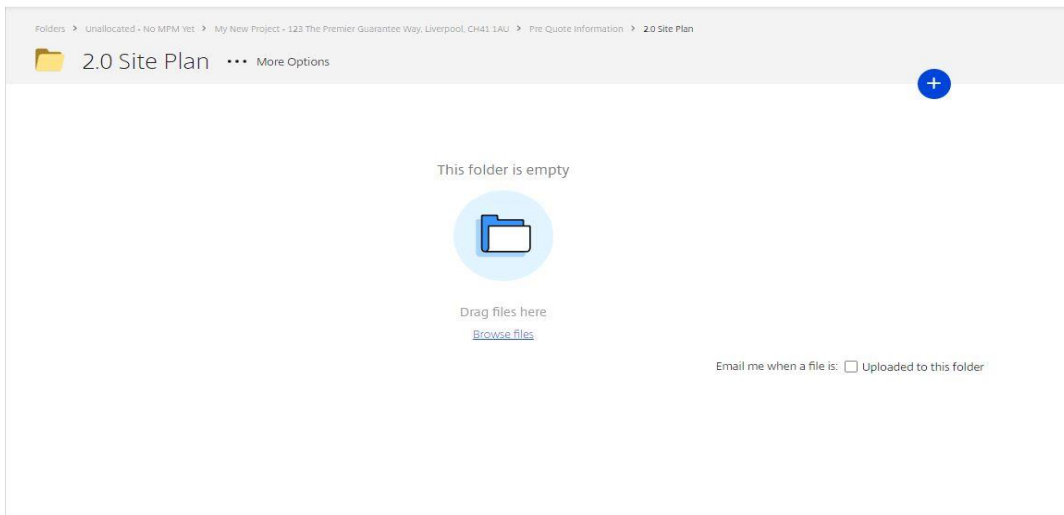
For High Value Schemes (recon. £25m+) it will be necessary to provide some initial information to present to the insurer that the scheme is a “manageable risk”. This information will need to be provided in the “Pre Quote Information” folder.

As the scheme progresses, responses to our Design Review Report, Site Inspections and Validation Certification are also uploaded and provided to the team.



4. For New Schemes, please provide the information listed in the above folders promptly to allow us to produce an accurate quotation as soon as possible.

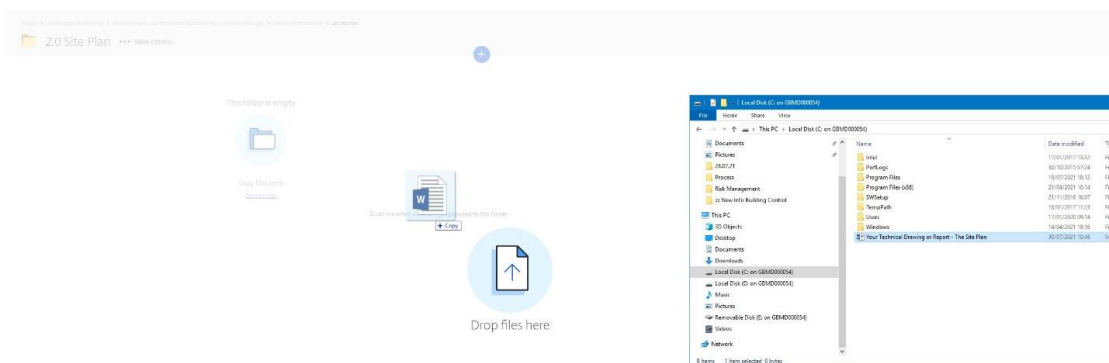
We promote active engagement at late RIBA Stage 2 to ensure that we can provide your design team with the advice they need to get it right first time.



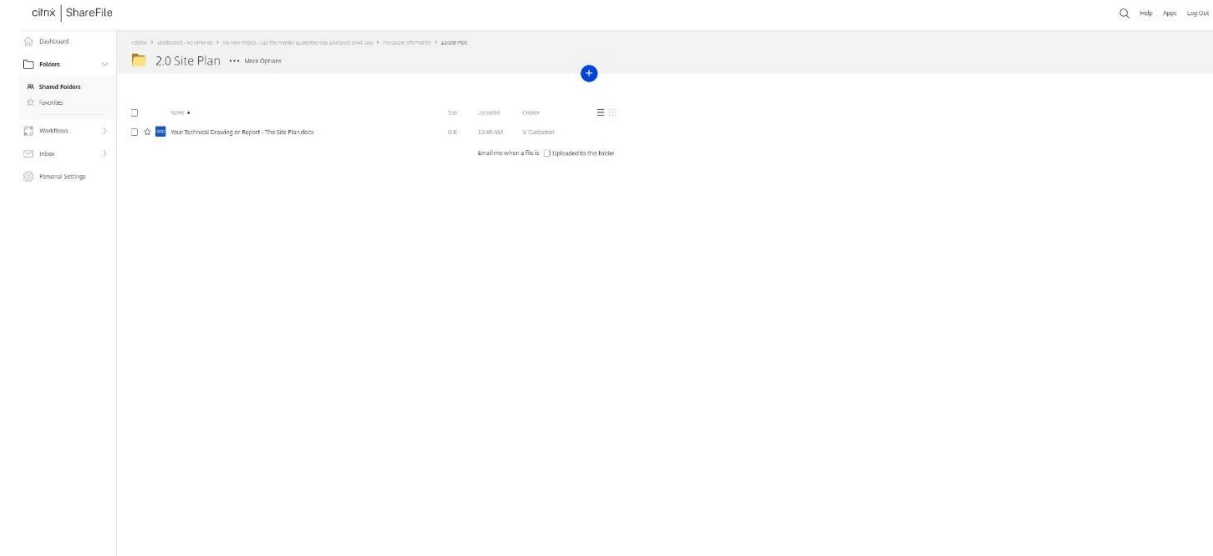
5. To upload information, click on the folder with the topic you wish to upload to and the screen above will appear.

You'll be asked to "drag and drop information" by clicking a document or multiple documents, such as a PDF, and dragging it to the folder icon.

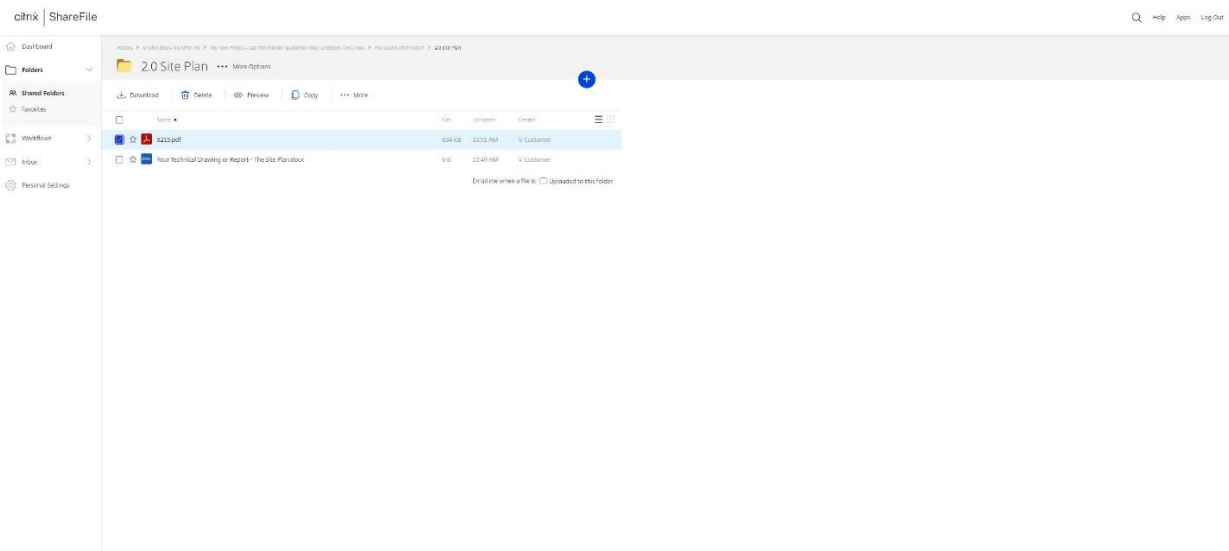
Alternatively, you can use the blue + circle.



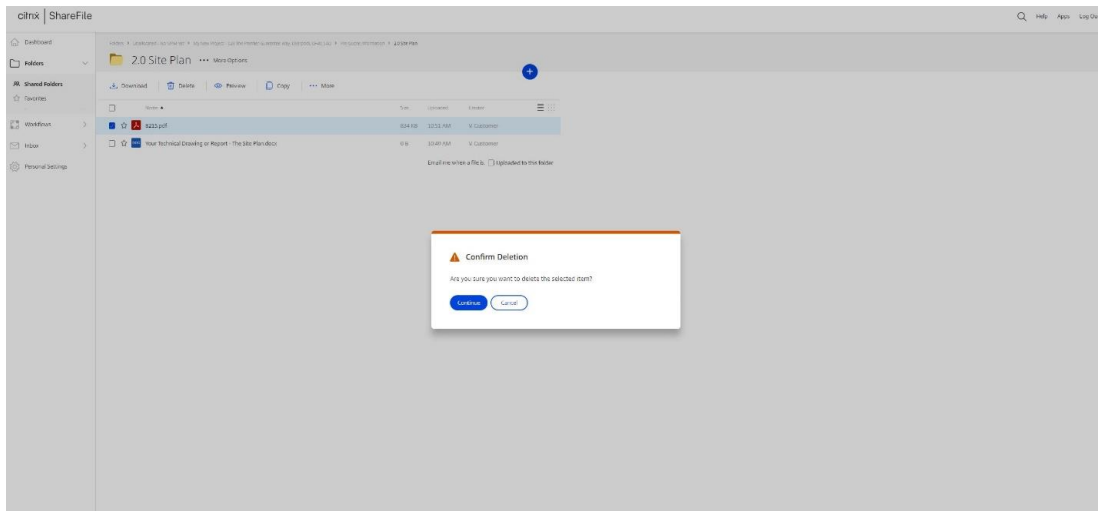
6. To drag and drop, click the document you want to submit, hold the left key of the mouse and then drag it as you hold toward the folder icon and release.



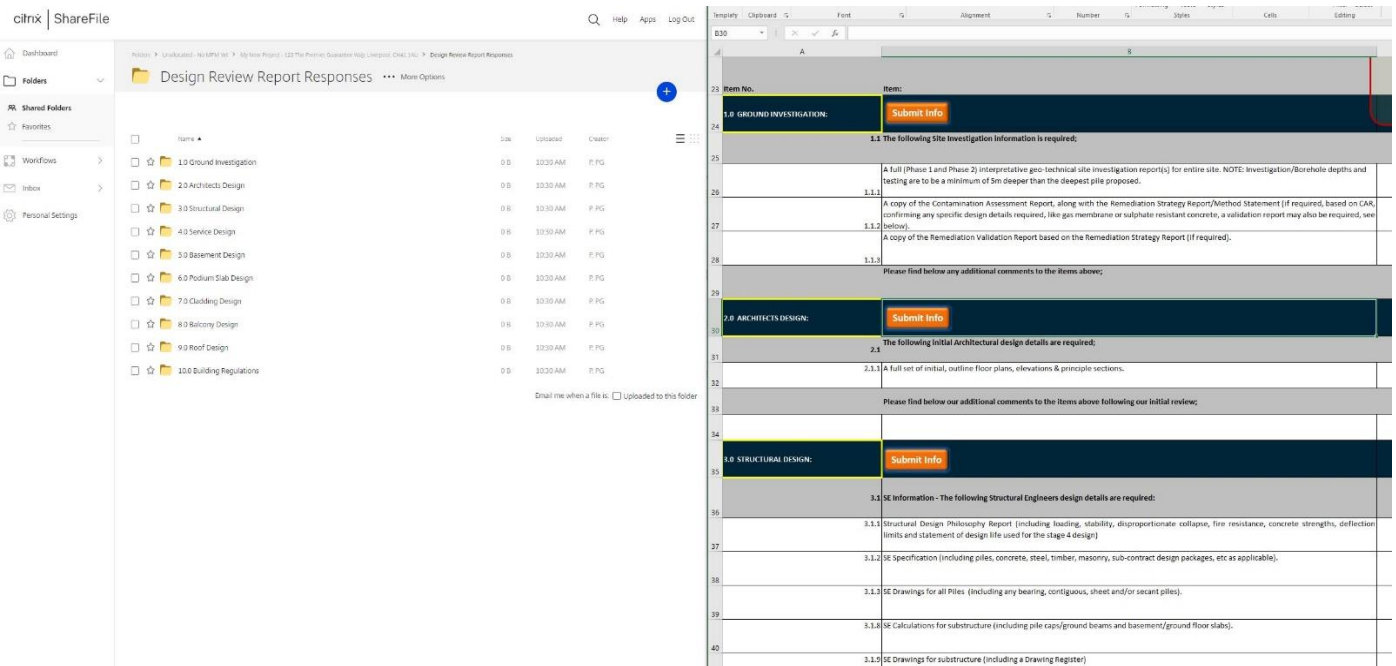
7. Once this information has been dragged over successfully, you will see the document placed on the ShareFile as above.



8. You can delete items by selecting the document(s) and then using the delete icon at the top of the screen.



9. You'll be asked to confirm deletion.



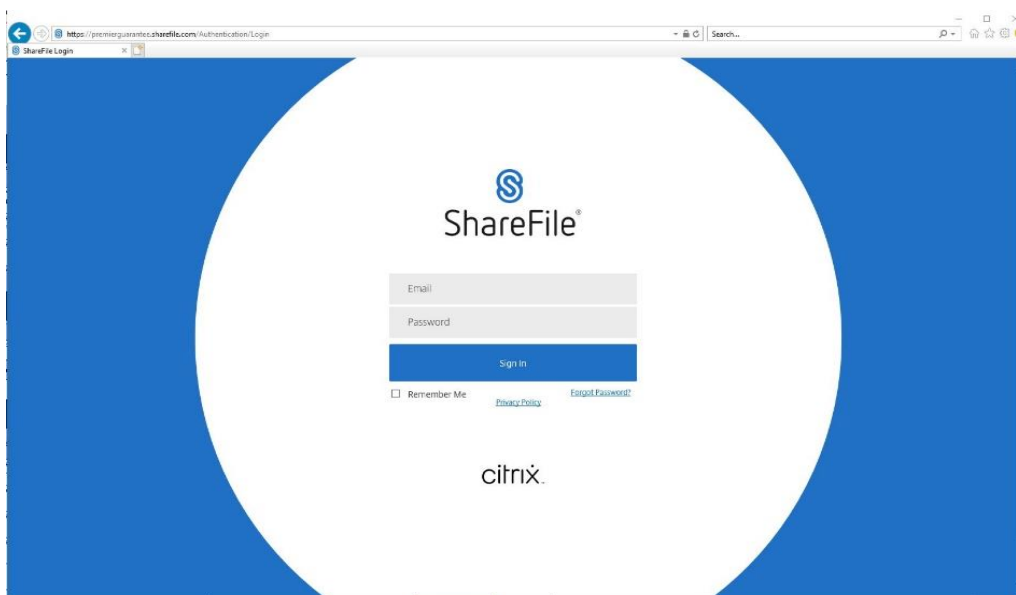
10. One of the key benefits of ShareFile is the link it provides between our Design Review Report and other documents, and the Document Submission Portal. Each section of our review is segmented into categories related to the building, which are exactly mirrored within the ShareFile document management portal for your scheme. As seen above, each main category and query reference number subfolder match.

The screenshot displays the ShareFile web interface. On the left, a sidebar shows a folder named 'Design Review Report Responses' containing various design files. The main area shows a document titled 'Explication of Terms used within Design Review Report and Progress Tracker'. The document content includes a table with the following structure:

Decision	Comments	Date Received	Date Last Reviewed	Status
Declined	Minorities to be provided in question to be resolved in order for the risk to be assessed in accordance with our technical standards.			
Partially Approved	Further Minutes Required, any further further conditions which are requirements to the final query. Please note the terms for payment.			
Under Review	Geotechnical information in response provided to a qualified third party under review by our technical standards.			
Approved	See above, information provided to be considered for a complete proposal.			
Not	Consideration given to other relevant factors over detailed not applicable or relevant to our sites.			

Below the table, there are sections for '1.0 GROUND INVESTIGATION', '2.0 ARCHITECTS DESIGN', and '3.0 STRUCTURAL DESIGN', each with a 'Submit info' button. The 'Submit info' buttons are highlighted in yellow.

11. In order to make it even easier to work with us, we provide buttons within our documents which link you straight to the ShareFile for your convenience. The submit info button is highlighted in yellow for clarity here.



12. When you click the submit info button, you'll be invited to log in and then be directed to the relevant folder. Information can then be uploaded as per step 6 onward.

Frequently asked questions

Q. How does the project team know Premier Guarantee have received the information?

A. Our team receive notifications when information is uploaded. It is then passed to the technical team for review. Where feedback cannot be provided immediately, we will mark the information as “under review” in our Design Review Report. Notable variations from typical accepted construction technology practices must be communicated in writing to your Major Projects Manager and any advancement without formal acceptance will be at risk that a warranty may not be provided.

Q. I can't get access to ShareFile, what steps should I take?

A. As the information on ShareFile is secure, only those who have been issued an invitation can view and access the information. The most common reason why access is not available is that an invitation has not been issued to you.

Please contact your Major Projects Account Manager in order to ensure that you and your colleagues have been provided full access to upload information. We recommend providing a project directory for the scheme to ensure all those working on your project are able to view and upload information.

Q. The project has its own document management system, can Premier Guarantee use that instead?

A. Unfortunately, no. In order to provide a warranty we need to be sure that the information provided is relevant and accurate to the queries we raise. We need to be able to rely on this information for risk management and make the recommendation that the scheme is an insurable risk, therefore it is imperative that ShareFile is used.

Q. One technical document already uploaded covers a number of points, do I need to upload it multiple times to different folders?

A. This would be strongly recommended as it ensures that the audit trail is present - it shows the intention was for the information submitted to address the query raised and it demonstrates reasonable due diligence in the event of a dispute.

It is good practice where this situation occurs to accompany your submission with an email to the Major Projects Manager for your scheme and explain where they can find the information within your documentation. This will ensure queries are addressed and accepted, allowing the project team to move forward with confidence that what is being built will meet our requirements.

- Q. I have information saved in a set way, can I add or change the folders on ShareFile for the project?**
- A. In order to produce a robust audit trail we would ask you to kindly refrain from making changes to the folder structure or additional subfolders. Where information in subfolders adds to clarity or is already saved in a certain format which would make it unreasonable to re-administer, it may make sense to provide it within the existing numbered folder structure in order to ensure the query can be met.
- Q. New conditions have been added to the Design Review Report but not the ShareFile folder structure. What should the project team do?**
- A. Although we endeavour to keep the ShareFile folder structure as up to date as possible, there will be instances where conditions are applied and the folders are not up to date. Please list the folders which are not up to date and contact your Major Projects Account Manager or Major Projects Manager whom will ensure these are updated at the earliest possibility.

Every care was taken to ensure the information in this article was correct at the time of publication. Guidance provided does not replace the reader's professional judgement and any construction project should comply with the relevant Building Regulations or applicable technical standards. For the most up to date Premier Guarantee technical guidance please refer to your Risk Management Surveyor and the latest version of the Premier Guarantee Technical Manual.

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MD Insurance Services Limited is the Scheme Administrator for the Premier Guarantee range of structural warranties.
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