

# Chubb Risk Engineering Exchange User Guide

CHUBB®

Risk Engineering Services

# Welcome to the Chubb Risk Engineering Exchange

## Initial Log In

Your initial access to the Exchange will be arranged via the **Customer Client Administrator** for your company. Once they have setup your credentials you will receive a login details email with a **User ID and Temporary Password** that will guide you to the **Chubb Portal System**. This provides the front-end security for the **Risk Engineering Exchange** and subsequent access.

When you wish to revisit the **Chubb Risk Engineering Exchange**, you will access via the **Chubb Portal** link, which is <https://www.chubb.com/riskengineeringexchange>. **Bookmark** this page for easy future access:


# Welcome to the Chubb Portal



### Login

  
Enter User ID

---



Remember me

[Forgot User ID or Password?](#)

# Welcome to the Chubb Risk Engineering Exchange

Once you have logged in with your user ID and temporary password, you will be prompted to **Change your Password**. Do so following the password requirements indicated and then Log Back Into the Chubb Risk Engineering Exchange using your new password:

**CHUBB** @Chubb

### Change Password

Use the form below to change the password for your @chubb account

New Password

Password strength: ■ ■ ■ ■ ■

- Cannot match your User ID, First or Last name or a previous password
- Minimum 8 characters
- Have at least 1 capital letter and 1 lower case letter
- Have at least 1 number and 1 special character ( !@#\$%^&\*(){}|~`?/)

Confirm Password

Save Changes Cancel

**Chubb. Insured.**

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# Welcome to the Chubb Risk Engineering Exchange

Once logged in, you will be presented with the **Terms of Use and Cookie Acceptance** page. You must accept both to utilize the Chubb Risk Engineering Exchange. You will only need to do this once. You can access the **Terms of Use**, the **Cookie Policy** information, and our **Privacy Policies** at any time once you are in the Chubb Risk Engineering Exchange:

The screenshot shows the Chubb Terms of Use page. At the top left is the CHUBB logo and "Terms of Use". At the top right is the user name "Dusty Hill" with a dropdown arrow. Below the header is a cookie notice: "★ This website uses strictly necessary cookies. These cookies are necessary for the website to function properly. For more information please see our Cookie Policy." followed by a blue "Learn More" button. To the right of the cookie notice are two buttons: "Accept for this session" and "Accept and save to profile". Below this is a scrollable text area containing the following text:

**Company:** Chubb INA Holdings Inc., on behalf of itself and its affiliates ("Chubb")

**Licensee:** The employer or principal of the User, to whom access to this Portal has been provided through a unique User ID and password. As used herein, "you" means the Licensee and User collectively.

**Licensee agrees to the Terms of Use for the Chubb Group Web Site ("Terms of Use"), and such Terms of Use shall apply to this Portal to the same extent that they apply to such Website, except as set forth herein. To the extent of any conflict between such Terms of Use and this Agreement, the Agreement shall prevail.**

In addition to such Terms of Use, the following terms apply:

**Definitions:**

"Administrator" means an individual employed by the Licensee who has the right to grant to Licensee's employees, who have a bona fide business need for access, access to the Portal.

"Content" means the data supplied by Chubb (and any third party, if applicable) pursuant to this Agreement and presented through this Portal.

"Documentation" means any instruction manuals, user guides and other recorded matter in either printed or machine-readable form made available by Chubb to the Licensee and the Users.

"Insurance Program" means the policy(ies) of insurance issued by a Chubb insurer from time to time.

"Insured" means the principal insured entity(ies) named under a Chubb Insurance Program.

"Non-Insurance Customer" means a person or entity purchasing services from Chubb outside of an insurance relationship.

"Portal" means access to the Content and Documentation, provided by Chubb to the Licensee in accordance with this Agreement.

"Use" means the use of this Portal pursuant to this Agreement.

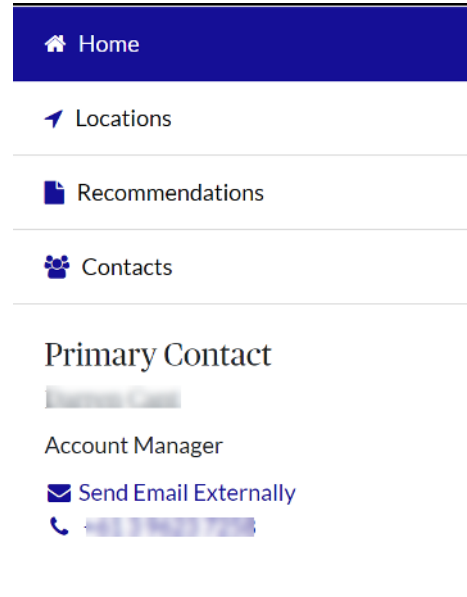
Two red arrows point to the "Accept for this session" button and the "Accept Terms of Use" button.

You will now be taken to **the Chubb Risk Engineering Exchange** home page.

# Welcome to the Chubb Risk Engineering Exchange

## Get to Know the Home Page

The home page gives you immediate access to the information you need including a dashboard with important statistics and activities.



Use the **Home** button to return to this page from any screen. This menu is always available on the left side of any screen.

The menu panel on the left provides direct links to your **Locations, Recommendations, and Contacts.**

If available, you may also click the **Telephone Number** to call, if your device is able to make phone calls. **Clicking Send Email Externally** will open your native email server to allow you to send an email.

## Welcome to the Chubb Risk Engineering Exchange

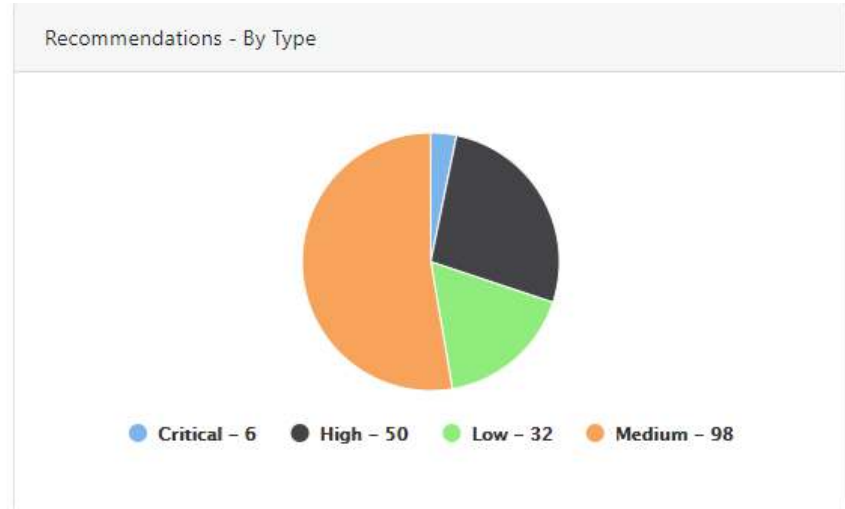
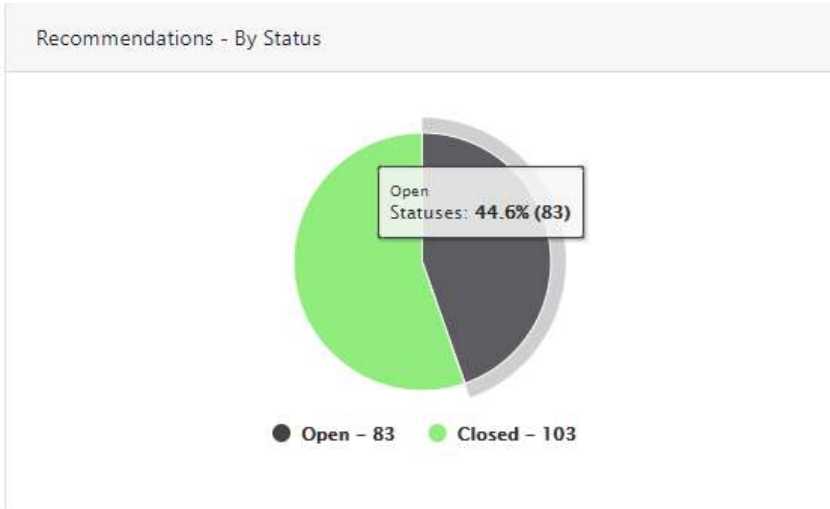
Clicking one of the **Scrolling Pictures** will open website pages to learn more about Chubb Risk Engineering and services. The **User Guides** will also be available via this section

## Chubb Risk Engineering Exchange



# Welcome to the Chubb Risk Engineering Exchange

Recommendations are graphically summarized by **Status** and **Type**. Roll over a wedge to view the percentage.

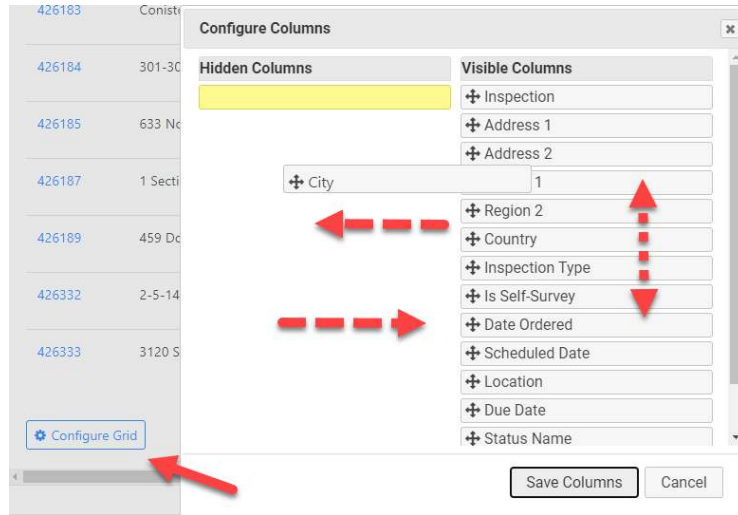


The grid of **Open Inspections** lists upcoming and active inspections. You can use the **Suggest Appointment** button to request a convenient date and time for the risk engineer to schedule the visit. Blue text indicates a hyperlink to detailed information for the inspection or location. Sort the grid using the arrows next to any column heading.

Inspection	Location	Address 1	City	Region 1	Country	Scheduled Date
400057	<a href="#">[Link]</a>	100 [Link] Way	Rancho Palos Verdes	California	US	<a href="#">SUGGEST APPOINTMENT</a>

# Welcome to the Chubb Risk Engineering Exchange

Rearrange the columns using the **Configure Grid** button at the bottom of each grid. Click and drag the headings to rearrange the viewing order, or hide/make visible the available headings.



The grid of **Completed Inspections** displays the location, address, date completed, open and closed recs, and more. Blue text indicates a hyperlink to detailed information for the inspection, location, recommendation, etc. Sort the grid using the arrows next to any column heading. Rearrange the columns using the **Configure Grid** button at the bottom of the widget.

Inspection	Date Completed	Location	Address 1	City	Region 1	Open Recs	Closed Re-
<a href="#">378220</a>	10/9/2019	<a href="#">[Redacted]</a>	[Redacted] Ave	Los Angeles	California	1	0
<a href="#">378226</a>	10/4/2019	<a href="#">[Redacted]</a>	[Redacted] Ave	Woodland Hills	California	0	3
<a href="#">378222</a>	10/1/2019	<a href="#">[Redacted]</a>	[Redacted] Blvd	Orlando	Florida	0	4
<a href="#">386927</a>	10/1/2019	<a href="#">[Redacted]</a>	[Redacted] Dr	Plantation	Florida	3	0



## Welcome to the Chubb Risk Engineering Exchange

Look in the **Client Attachments** for the Service Plan, Stewardship Reports, and other service program documentation. If relevant only to a single location, you will see the location name as well. Click the document Name to open it. Use the descending arrow on the Date Added column to be sure the most recent attachments are at the top of the grid.

Client Attachments			
Location	Name	Description	Date Added
	<a href="#">Service Plan 02_14_2020 13_04.docx</a>	2020 Service Plan	2/14/2020
	<a href="#">Stewardship Report 08_16_2019 10_20.docx</a>	2018-2019 Stewardshi...	8/19/2019

Get a snapshot of your **Locations** with the dashboard grid showing the last inspected date and recommendations. Clicking the blue text links, takes you to detailed information for the location and recommendations. As with the other grids, you can sort using the column and use the Configure Grid to arrange them to your liking.

Locations						
Name	Last Inspected Date	Open Recs	Closed Recs	Region 1	City	Address
<a href="#">[blurred link]</a>	3/3/2020	1	1	Texas	[blurred]	Spring St
<a href="#">[blurred link]</a>	3/3/2020	1	2	Texas	[blurred]	Grand Pa
<a href="#">[blurred link]</a>	8/16/2019	0	0	New York	[blurred]	3333 NEV
<a href="#">[blurred link]</a>	8/5/2019	3	0	Florida	[blurred]	Thomasv
<a href="#">[blurred link]</a>	7/29/2019	0	1	Maryland	[blurred]	York Roa

# Welcome to the Chubb Risk Engineering Exchange

## Correspond with Your Insurance Team

The **Contacts** menu option opens a page listing contact information for the individuals involved with your Chubb insurance program. In addition to your Risk Engineering Account Engineer, you can access your underwriter or broker.

Click the blue telephone number to call your **Account Engineer**, if your device has that capability. Click **Send Email Externally** if you want to send an email via your native email program.

Home

Locations

Recommendations

**Contacts**

Primary Contact

Thomas Cook

Account Manager

Send Email Externally

+1 212 854 4173

Contacts

Agent **Primary**

Thomas Cook

CHUBB AGENCY SERVICES DEPARTMENT

212 854 4173

Underwriter

Lynn Spence

Send Email Externally

212 854 4173

## Manage Locations

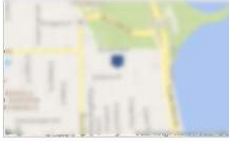
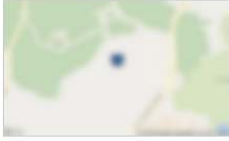
From the **Home Page** or the always-available left side menu, you can access all the locations that have been visited by Chubb Risk Engineering. You can scroll through the list to find your desired location, or you can use the **Keyword** search at the top of the page to quickly find locations that have that word in their **Name** or **Location Address**.



# Welcome to the Chubb Risk Engineering Exchange

The **Locations** menu option provides a list of locations visited by Chubb Risk Engineering Services. The preview is organized by Name and includes a thumbnail map, address, last and next scheduled visit date, and a count of open and closed recommendations.

Click the button to **View Details** for more information.

	<b>Name:</b> [Redacted] <b>Location Address:</b> 1915 N. Clark Street Chicago, Illinois US	<b>Policy #:</b> [Redacted] <b>Last Inspected Date:</b> 11/7/2019 <b>Next Scheduled Date:</b>	<b>Open Recs:</b> 3 <b>Closed Recs:</b> 3
<a href="#">View Details</a>			
	<b>Name:</b> [Redacted] <b>Location Address:</b> 10001 La Cumbre Parkway San Antonio, Texas 78249 US	<b>Policy #:</b> [Redacted] <b>Last Inspected Date:</b> 9/27/2019 <b>Next Scheduled Date:</b>	<b>Open Recs:</b> 10 <b>Closed Recs:</b> 3
<a href="#">View Details</a>			

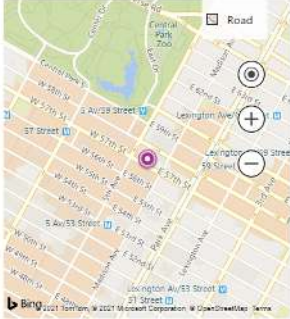
Navigate the Location information using the tabs.

## General

Zoom in and out on the map.

Quickly understand Recommendations with the dashboard graphs specific to this location.

General | Inspections | Recommendations | Attachments



Recommendations

**By Type**

- High - 4
- Medium - 3
- Low - 1

**By Status**

- Closed - 3
- Open - 3

# Welcome to the Chubb Risk Engineering Exchange

The **Inspections** tab lists all visits for this location. View inspector, date completed, and inspection type.

Click the expand + **Icon** to view the completed inspection attachments and any correspondence related to the inspection.

General Inspections Recommendations Correspondence Attachments

Keyword Search

Inspection Number: 388549  
Policy Number: [redacted]  
Completion Date: 11/22/2019 4:23:58 PM  
Inspection Type: Service

Status: Complete  
Date Last Inspected: 11/6/2019 7:00:00 PM  
Inspector Name: Jennifer [redacted]

Use the **Recommendations** tab to view and respond to the recommendations submitted for this location.

The list of recommendations is organized by Type. The initial view shows **All Recommendations**.

Learn how to **Manage Recommendations** in the next section.

Click the UW Status buttons to filter the list by **Open** or **Closed** recommendations, and the Last Changed by buttons for **Chubb** or **Client** activity. For reporting or analysis in Excel, click the **Export Recs** button.

General Inspections Recommendations Attachments

Recommendations

By Status

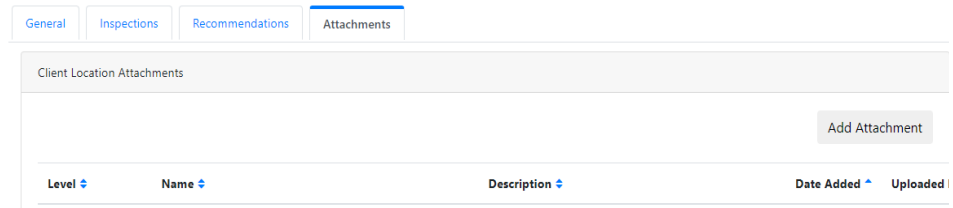
By Type

UW Status: Open Closed All Last Changed By: Carrier Client All

Export Recs Expand All

# Welcome to the Chubb Risk Engineering Exchange

The **Attachments** tab lists all of the attachments for this location. As with all lists in the Risk Engineering Exchange, click the column heading arrows to sort the list. The keyword search can help quickly find a specific item. Additional Attachments can be added via the **Add Attachment** button.



The screenshot shows the 'Attachments' tab selected in a navigation menu. Below the menu is a header 'Client Location Attachments' and an 'Add Attachment' button. A table with the following columns is visible: Level (with a dropdown arrow), Name (with a dropdown arrow), Description (with a dropdown arrow), Date Added (with an upward arrow), and Uploaded (with a dropdown arrow). The table body is currently empty.

## Manage Recommendations

One of the key benefits of the Chubb Risk Engineering Exchange is the ability to see and manage all your recommendations in one place. You can view recommendations by specific **Location** within that location's information or all the locations to which you have access, via the always-available left side menu. You can easily **Respond** concerning the status of recommendations to your Chubb Risk Engineering **Account Engineer**.

# Welcome to the Chubb Risk Engineering Exchange

The **Recommendations** left-hand menu option provides quick access to all recommendations. The list of recommendations is organized by Location and Type. The initial view shows All recommendations.

↓ Focus on active recommendations by clicking the **Open** button to filter the list

↓ Export to Excel for analysis and reporting

UW Status: **Open** **Closed** **All** Last Changed By: **Carrier** **Client** **All** Export Recs Expand All

Use the – and + icons to collapse and expand each **Location** or **Rec Type**.

☐ Location: [Redacted]

⊕ Rec Type: High (1)

⊕ Rec Type: Medium (3)

☐ Location: 1 [Redacted]

⊕ Rec Type: High (4)

⊕ Rec Type: Medium (4)

⊕ Rec Type: Low (1)

To review recommendations, expand the Rec Type. In the review banner, you can see the number, title, if there have been any changes and the status of your response.

⊕ PC 19-1107-610-02 SAFETY TRAINING	INSPECTION #: 388549 (COMPLETE)	LAST CHANGED BY : N/A	⚠ YOUR RESPONSE: NO ACTION TAKEN
⊕ PC 18-0911-008-01 HOUSEKEEPING IN STORAGE ROOM	INSPECTION #: 350636 (COMPLETE)	LAST CHANGED BY : [Redacted] 12/19/2018 9:50 AM EST	⚠ YOUR RESPONSE: IN PROCESS

# Welcome to the Chubb Risk Engineering Exchange

Use the + icon to expand each recommendation view the **Details**, read the **Responses**, and provide an **Update**.

To enter an Update, click the appropriate status button.

Add a **Note** to explain the status change.  
Notes are required for all updates.

Photos, certifications, test results etc., are especially helpful to demonstrate action taken or completion of a recommendation. Click the button to **Add/Edit Attachment(s)** to provide documentation.

Click the button to **Update this Recommendation** to submit your response to your Risk Engineering Account Engineer.

PC 19-1107-610-01 SAFETY      INSPECTION #: 388549 (COMPLETE)      LAST CHANGED BY: N/A      ▲ YOUR RESPONSE: NO ACTION TAKEN

PROGRAM DEVELOPMENT

## Recommendation Details

Recommendation:

To ensure the effective management of health and safety, and the control of injury or damage costs, we recommend the company develop a formal health and safety management system that is appropriate to the nature and scale of the company and its health and safety risks. The safety management system shall meet or exceed applicable codes and standards.

## Responses

There are currently no responses to this recommendation

## Recommendation Update

No Action Taken    In Process    Complete

\* Add Notes:

Notes are required for this status

(attach any photos / receipts or other documentation for this note.)

Add/Edit Attachment(s)

Update this Recommendation