

SHARING YOUR SCORE CONTRACTOR PROFILE



Once you've completed your contractor profile within SCORE, the next step is sharing your profile with current and potential project partners, allowing them to understand your company's capabilities and qualifications.

Searching for Project Partners & Providing Voluntary Access

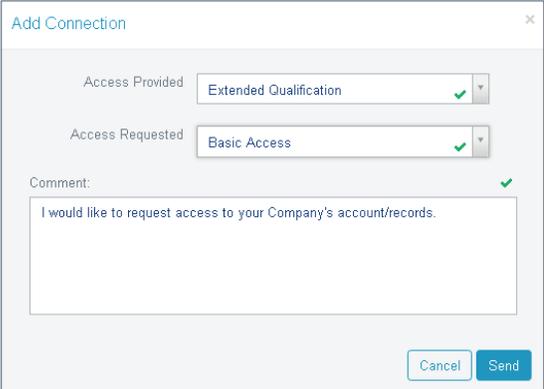
If you were asked to complete the SCORE System qualification steps by a specific contractor partner, you can easily complete this process by providing that company with access to your contractor profile. Simply follow the steps below to find partners and provide access at one of the four predetermined levels:

1. Once you're logged in to SCORE at scoresystem.com, click the "Search" option located within the navigation bar at the top of your screen.
2. Using the filters available—typing all or part of the company's name in the "Company/Trade Name" box is the easiest—search for the Lockton client you wish to share your contractor profile with. Each company that you are able to connect with will have a "C" next to the SCORE logo in the search results, indicating that it is a Lockton client.

Company Name	TradeName	City	State	Profile Status	
Lockton Companies, LLC	Lockton	Kansas City	Missouri	<div style="width: 78%;"><div style="width: 78%;"></div></div> 78%	



- To make a new connection, click the chain-link button on the far right of the identified company. An “Add Connection” request box will appear. Here you have the option to decide which of the 4 preset sharing levels you want to provide to this contractor (most require extended access for qualification). Details on these levels are outlined later in this document.
- Once you click “Send,” access to your contractor profile (at the level provided) will be immediately available to the Lockton client for qualification purposes. Return access will be granted once the request is approved.
- The access level that you have to another contractor’s profile is indicated by the colored box to the left of its company name in the search results, and the different sections of its profile are viewable based on the permission level provided.
- You can view/edit/change/delete any existing connections using the “Information Sharing” section on your company’s main “Contractor Profile” page.



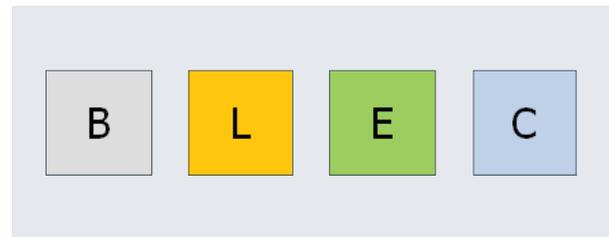
Add Connection

Access Provided: Extended Qualification ✓

Access Requested: Basic Access ✓

Comment: ✓
I would like to request access to your Company's account/records.

Cancel Send



Reviewing & Confirming a Received Request for Access

If you receive an email or SCORE notification that a contractor has requested access to your profile, you have the option to review that company's basic profile, then confirm, modify, or reject the request.

1. If a Lockton client identifies your company within the system and sends a connection request, administrators for your company will receive a notification within the system, as well as a direct email (coming soon). When viewing the connection request, it will be clearly noted what company has requested access and what level of access it has asked for you to provide. You will also have the option to view the profile of the company requesting access to your contractor profile (especially helpful if you're unfamiliar with the company).
2. When you're ready to respond, you will select "Confirm Request," which creates a new pop-up window. Within this window, the access permissions requested and granted to you by the requesting company will be shown and you will have the option to accept these permissions as requested, modify the requested permissions before accepting, or decline the connection request entirely. The requesting individual will receive a notification of your response.
3. Once an initial connection is established, regardless of the access provided, this relationship can be managed in the "Information Sharing" section of your contractor profile.

The image shows a screenshot of an email notification from Lockton SCORE and a corresponding dialog box. The email is addressed to an administrator and informs them that ABC Construction, Inc. has requested a new level of access (Extended Qualification) to Lockton Companies, LLC's SCORE Qualification Profile. The email details the current access level (Basic Access) and provides a comment from the contractor: "I would like to request additional access to your Company's account/records". Below the email content are two buttons: "View Profile" and "Confirm Request". At the bottom of the email, there is a thank you message and a copyright notice for 2016 Lockton Companies. The dialog box, titled "Manage Existing Connections", shows the current access level as "Limited Qualification" and the requested access level as "Extended Qualification". It includes radio buttons for "Accept", "Accept & Request Additional Access", and "Decline", along with "Cancel" and "Confirm" buttons.

UNDERSTANDING HOW INFORMATION IS SHARED

One of the keys to Lockton’s SCORE System is the contractor’s ability to decide which companies it wishes to share its qualification information with and what qualification information to share. Through a request/acceptance process, you can decide which of the following sharing access levels you want to provide to each general contractor or owner.

The chart below, and the descriptions on the following page, provides an outline of what information is shared versus what information remains protected at each of the access levels.

Contractor Profile Information	Basic	Limited	Extended	Comprehensive
Basic Profile Sections	✓	✓	✓	✓
Basic Profile Sections—Attachments	✓	✓	✓	✓
Qualifications Sections		✓	✓	✓
Nonfinancial Qualifications—Attachments		✓	✓	✓
Risk Ratings Summary		✓	✓	✓
Credit Strength Risk Rating Details			✓	✓
Safety Record Risk Rating Details			✓	✓
Submitted Financial Statements				✓

B »» BASIC ACCESS

The **BASIC** sharing access level is available, by default, to all Lockton clients that utilize SCORE for their contractor qualification processes. The information shared under this setting is designed to provide the information needed for general contractors and owners to search, identify, and connect with individual project partners, while limiting what is shared to entirely nonconfidential, primarily publicly available, information.

L »» LIMITED ACCESS

The **LIMITED** sharing access level was designed to be the most restrictive sharing setting, while still providing a wide range of information that can be used to evaluate and qualify a potential contractor partner. This level may also be used for reverse-qualification, where general contractors or owners can display their credit and safety strengths to enrolled contractors, at their discretion, without exposing unnecessary profile information.

E »» EXTENDED ACCESS

The **EXTENDED** sharing access level is the most widely requested access level for contractor qualification. It includes responses to the fundamental questions at the BASIC and LIMITED levels, while providing the detailed breakdown of the generated Credit Risk and Safety Record Ratings. For most Lockton clients utilizing SCORE, sharing their contractor profiles at the extended sharing access level may be mandatory—especially to satisfy the requirements of a contractor default insurance policy.

C »» COMPREHENSIVE ACCESS

The **COMPREHENSIVE** sharing access level provides access to nearly all information submitted to SCORE during the completion of your contractor profile, including financial documentation. The only information restricted under this setting is the work-in-progress schedules provided but only if they are submitted as a separate document from the financial statements.

Our Mission

To be the worldwide value and service leader in insurance brokerage,
risk management, employee benefits, and retirement services

Our Goal

To be the best place to do business and to work



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