Blueprint Two

**Get ready for the
new digital services**

Phase one broker adoption checklist

June 2024

Project and change management

Get ready for phase one:

☐ **Identify all stakeholders who are supporting or affected by the change** and ensure that they are aware of the deployment impact

☐ **Hold regular meetings with identified stakeholder groups** to seek progress updates and reinforce change benefits

☐ **Plan your adoption roadmap** using the activities outlined in the adoption guide

☐ **Revise your adoption change plan**, detailing the activities, owners, and due dates

☐ **Liaise with your vendor** to ensure they are aligned to any changes and that they can deliver on technology requirements

☐ **Assess and validate any role and responsibility changes /** organisational redesign opportunities

☐ **Revise cost estimates** associated with digital phase one adoption (e.g. training and testing costs)

☐ **Obtain approval for revised budget allocation proposals** from project sponsors
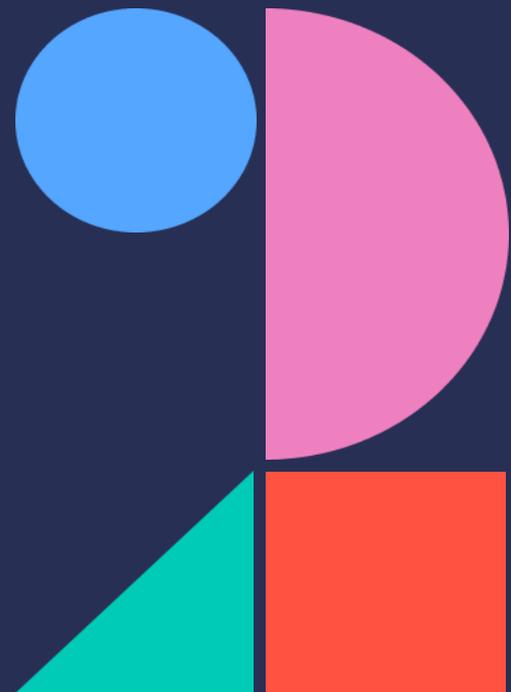
Market gateway

Get ready for phase one:

☐ **Obtain your new security credentials** to connect to the market gateway (ASG Adept)

☐ **Share the credentials with your IT team or service provider**, who are responsible for reconfiguring your systems and testing the new gateway

☐ **Ensure your IT team / service provider implements new security authentication processes** ahead of phase one go-live

☐ Work with your IT team/service provider to **ensure they are able to collect data from the new SFTP location**

Messaging

Get ready for phase one:

- [ ] **Ensure the Blueprint Two technical specifications have been reviewed** by your IT team/service provider to establish how messaging is changing

  - [ ] **Complete an assessment of required changes** to the structure, format, and content of your existing messages

- [ ] **Take action to accommodate any minor variances** to the published EDI messages

- [ ] **Establish if you currently use customised/transformed messages** (your engagement partner can help you determine this)

- [ ] **Validate the list of messages supplied by Velonetic** confirming which standard and customised messages you currently receive, and assess if they will be supported going forward

  - [ ] Consider whether there are any customised messages that will no longer be needed

  - [ ] **Decide which (if any) customisations you wish to retain** and decide if you need to revert to standard or supported versions

- [ ] **Work with your IT team/service provider to compare the content of the standard/supported messages** for any data gaps, if your existing messages will no longer be supported

- [ ] **Establish the cost and resources required** to revert to the standard/supported versions; or to implement any workaround processes needed in the interim

- [ ] Identify and **document any individuals who currently interact with/rely on messaging from Velonetic**

- [ ] Identify and **document current processes that interact with or support existing messages**

- [ ] **Document the changes required to the existing processes** in your impact assessment tool and your change plan after establishing which changes impact messaging

  - [ ] If you need to make updates to your messages/automated processes/robotics technology, **work with your IT team/service provider to obtain sign-off and complete the updates**

- [ ] **Identify all data files that you receive from Velonetic** (e.g. EDI messages) and how/where they are collected (usually an SFTP site)

  - [ ] For **manual data collection;** work with your IT team/service provider to update to the new file collection locations once confirmed by Velonetic

  - [ ] For **automated data collection;** work with your IT team/service provider to ensure changes are made to support ongoing auto collection from the new SFTP location

  - [ ] If you currently receive your EDI via email, **you will need to find an alternative location** (an SFTP is recommended)

New digital market services: IPOS & ICOS

Get ready for phase one:

Accessing IPOS & ICOS:

- [ ] **Obtain the URL for the IPOS & ICOS portals** once available from Velonetic and **ensure this is whitelisted**

- [ ] **Review your security specifications** and work with your IT team/service provider to set up and implement authentication

- [ ] **Ensure that all users can access the portals**

- [ ] **Establish if your internal systems interact with any of the portals/applications that will no longer be available,** then document these changes and inform your IT team/service provider

- [ ] In the case that you need to make updates to your existing systems or technology, **obtain sign-off and seek internal approval for the associated costs**

- [ ] Inform your IT team/service provider of any changes required to internal systems to **update the interaction with the new portals/applications**

Using IPOS & ICOS:

- [ ] **Document the IPOS & ICOS portal processes** and modifications to existing portal processes

- [ ] **Update any user manuals** and record the changes in your impact assessment tool and change plan

- [ ] **Review ancillary processes** to facilitate near-real-time processing

- [ ] **Identify any IT system changes required** and capture them in your change plan

- [ ] **Compare the data you currently provide and receive (e.g. ECF plus EDI)** and ensure you can secure the same data post go-live

- [ ] **Upskill users who will be using the new IPOS/ICOS screens** by ensuring they have access to the training materials available

Claims submission:

- [ ] **Decide on your chosen adoption channel for claims submission** after understanding the implications associated with each

- [ ] **Consider if the ICOS system satisfies your needs** and can serve as your primary platform or if you need to adopt your own technical solution for claims

Visit www.velonetic.co.uk/blueprint-two/home for more information on how to get ready

New digital market services: LORS & DRS (IMR)

Get ready for phase one:

LORS for outward reinsurance submissions:

☐ **Obtain the new URL for the LORS portal** once available from Velonetic and ensure this is whitelisted

☐ **Review your security specifications** and work with your IT team/service provider to set up and implement authentication

☐ **Ensure that all users can access the portals**

☐ **Establish if your internal systems interact with any of the portals/applications that will no longer be available,** then document these changes and inform your IT team/service provider

☐ **Obtain the Velonetic user manuals** as a training aid, once available

☐ **Upskill users** who will be using the new LORS screen

Document Repository Services (DRS) (IMR)

☐ **Obtain the URL for the new Document Repository Service portal** once available from Velonetic and ensure this is whitelisted

☐ **Review your security specifications** and work with your IT team/service provider to set up and implement authentication

☐ **Ensure that all users can access the portals**

☐ **Establish if your internal systems interact with any of the portals/applications that will no longer be available,** then document these changes and inform your IT team/service provider

☐ **Obtain the Velonetic user manuals** as a training aid, once available

☐ **Upskill users** who will be using the new DRS screen

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Reporting

Get ready for phase one:

☐ **Review your list of current Velonetic reports** (received via email in January) and decide whether they are still required

↳ ☐ **Distinguish which existing reports are still required post go-live** and assign a report owner(s) for each report that will continue to be used

☐ **Identify** where your reports are currently sent to or collected from and define how this process will be updated post go-live

☐ **Understand whether there is an automated process that feeds your report data into other databases**, as you may need to pull the raw data in different ways to continue the process

☐ **Assess and define any changes that will need to be made** to existing systems when replaced by self-service reporting

☐ **Work with your IT team / service provider to make updates to your existing systems** (if necessary)

☐ **Identify current report owners that will need to access the Qlik Sense tool to download new reports**, and who may require training to set up reporting

☐ **Provide reporting owners with upskilling** by reading the Qlik Sense training pack once available from Velonetic

There will be some rationalisation of language for reporting so look out for details of these changes from Velonetic