



Blueprint Two

**Get ready for the
new digital services**

Phase one carrier adoption checklist

June 2024

Please note: This checklist will evolve over time.

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

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 (1/2)



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
- Ensure your carrier messaging matches these specifications
- 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**

Messaging (2/2)



Get ready for phase one:

- 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)

- Consider your approach to ACORD4ALL** if you are currently using this message type, as it will be sunset:
 - ↳ **Identify your A4ALL messages** and consider a long-term plan to move away from A4ALL
 - Avoid adopting A4ALL** as this would be transitional only and therefore only a short-term solution

New digital market services: IPOS & ICOS



Get ready for phase one:

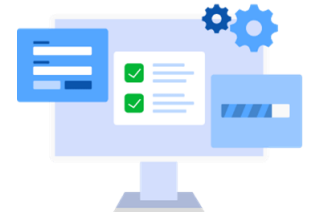
Accessing IPOS & ICOS:

- 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

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

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



