Velonetic

Onboarding Guide

For the cutover of customers to the new Digital Processing Services.

July 2024

Version 1.1

Contents

Introduction

Velonetic™ is making insurance easier for a smarter, faster, global marketplace.

Velonetic represents the joint ventures between DXC Technology, the International Underwriting Association (IUA) and Lloyd's, which have been operating for over 20 years in the London and Company markets, in both insurance and reinsurance business.

Our bold and fresh identity was announced at an inflection point for the insurance industry as we move away from legacy systems to data-focused, agile, and secure digital services that bring together the expertise of our people with the power of technology. Velonetic is a combination of velocity and kinetic. Speed and energy. Combine that speed and energy with expertise, talent, and technology, and we will continue to deliver customer excellence both today and in the future.

At the time of writing this Onboarding Guide, we – Velonetic, our customers, and other London market participants, are preparing for the safe cutover of our customers to phase one of the digital service, previously forecasted for October 2024. Unfortunately, due to challenges that have impacted our timelines, particularly in testing, the planned cutover to phase one digital services will be delayed. We will only cutover to phase one digital services once it is safe to do so and are satisfied a number of key activities have been completed or are near completion. Only then will we decide a new cutover date, informed by market feedback.

This guide has been written for go-live onboarding to our live production environments. It is still a useful reference for customers to prepare to onboard onto our test programmes. However, specific preparation for testing will be covered separately for those customers taking part in our testing programmes.

[1] We encourage you to refer to the information and materials available on the Blueprint Two section of the Velonetic website at **https://www.velonetic.co.uk/blueprint-two** to inform and assist your preparations for cutover to phase one digital services, and beyond.

Overview of DPS Onboarding

What do we mean by onboarding?

When we talk about go-live onboarding for DPS, we're talking about the transition of existing customers from our existing platforms and services onto the new Digital Processing Platform (DPP) and Digital Processing Services (DPS). This includes the registering of organisation-specific and user-specific information on the new platform to ensure that you can access the correct services and data. It doesn't include things like dealing with the contract, setting up and conducting testing or user training that would be considered part of the onboarding journey for a brand-new customer. These are being managed separately due to the scale of this one-off mass market transition.

While this guide has been written with our live platform in mind, you can also use It to help you onboard for our testing programmes as we need to collect the same type of Information. However, some of the emails and confirmation messages you receive may be different. We'll guide you through this as part of preparation for testing.

For queries directly relating to the **contract**, the contracting process or the price book, your DPSA point of contact has access to our Knowledge Repository containing all of the relevant documents. If after looking there, you still have questions please contact DPSA.Velontetic@dxc.com

For information on our **testing** programmes please see Testing framework | Blueprint Two (velonetic.co.uk) or contact your Customer Relationship Manager, Engagement Partner or Kerry Rainer krainer2@dxc.com.

For **training**, please see Training material | Velonetic

For onboarding, we'll ask existing customers to supply and/or confirm important pieces of information to enable a smooth transition. We're looking to use as much of the information that we currently hold as possible and are working to confirm how much we can re-use. This guide details everything you will need to think about.

High-level onboarding process

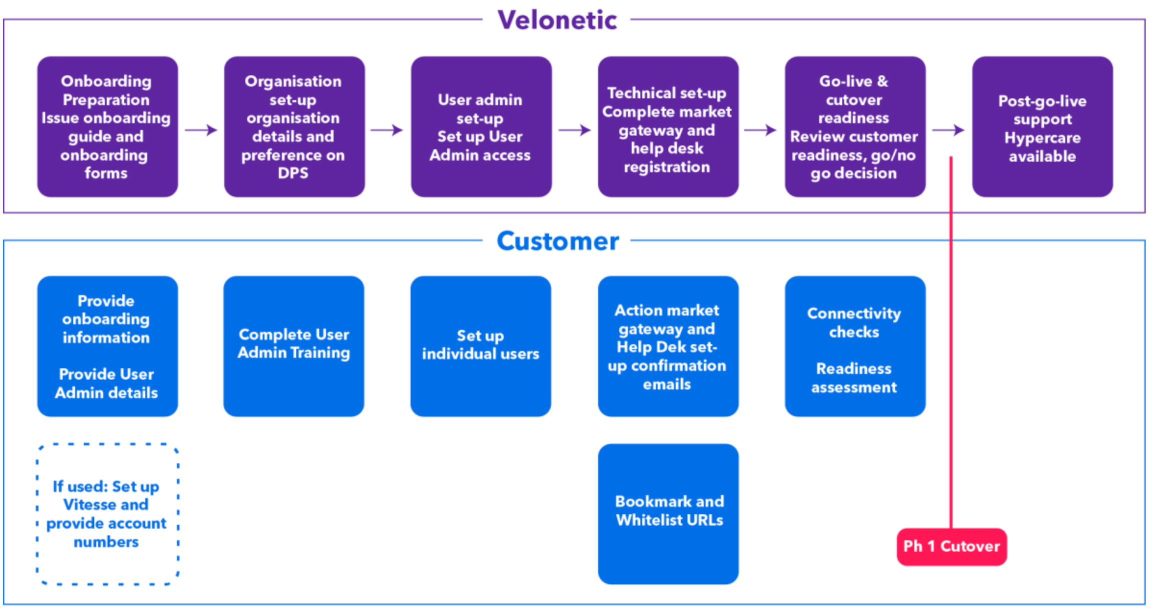


Figure 1: *High Level Onboarding Process*

Timeline of events

This will be updated following the publication of the re-plan due early August 2024

Figure 2: *Timeline of events*

Below is a timeline of onboarding events base on the plans in place at the time of writing. We will issue any updates and further information in a Market Communication and reissue the guide with any updated

DATE	EVENT
15th March 2024 onwards	DPSA & Order Form sent to nominated signatories
	FERN Termination Letter sent
	Go-live onboarding window opens for cutover to phase one digital services
	Onboarding Form issued by Velonetic
	All onboarding information returned by the customer
	DPSA signature deadline
	Velonetic set up Organisations & user administrators on DPS
	Organisations able to set up users at their organisation to DPS
	FERN Termination Letter returned by the customer
	Go-live onboarding complete – all customers ready for cutover
	Phase one cutover to DPS begins
	Post go-live support available

Detailed onboarding process

Preparatory activities

Customer contact details

To make sure that we work effectively together through the onboarding process, we've already asked customers to send us the names and email addresses of a Single Point of Contact (SPOC), and the name of at least two user administrators.

KEY CONTACTS

Single Point of Contact (SPOC)	**Single Point of Contact for all DPS related matters** • In January we asked each customer to provide us with a Single Point of Contact. • The role of the DPSA SPOC is to act as the main point of contact between you and Velonetic during the contracting and onboarding process. • We have provided access to the knowledge repository to the nominated SPOC so they can access the DPSA documentation. This was available from 9th February 2024. • To add or change your SPOC, contact **DPSA.Velonetic@dxc.com**
User Administrators (User Admins)	**The people responsible for setting up users and user access to the Digital Processing Platform (DPP) for your organisation** • We asked firms to provide us with the names and email addresses for user administrators by 1st March 2024 • You need a minimum of two user administrators to ensure that user approvals can take place within the organisation. The total number you need will depend on the number of users you need to manage, the structure of your organisation and its operating processes. • On 1st March, we set up the User Admins on the Velonetic Education Learning Platform so that they could access their training. • We will set up the User Admins for each organisation on the live platform using our user management portal, Parties. • **Prior to go live**, changes, additions or removals of User Admins can be processed by emailing DPSA.velonetic@dxc.com (following go-live this will be via the customer help service).

Contract completion

All organisations that wish to use our Digital Processing Services must sign the Digital Processing Services Agreement. The current contractual arrangements for central processing services will terminate and will no longer be valid. We will send a termination letter to each effected customer detailing the terms of termination. Commencement of the DPSA and the services under it are conditional on the signing of the termination letter. Elective Services where you have bespoke services provided under individual contracts and/or statements or work are currently not affected by the DPSA and the termination letter and will continue as now.

CONTRACT SIGNATORY

Who will sign the DPSA on behalf of your organisation

- We asked customers to complete a form supplying details of who will sign the contract for your organisation by 5th March 2024
- From March, we started sending a customer-specific pre-populated DPSA and Order Form to these named signatories using DocuSign when each firm confirms they are ready to sign.
- If you haven't received the contract and order forms, or have questions about the contract and
- associated documentation, contact DPSA.Velonetic@dxc.com

SIGNED DPSA & ORDER FORM

- We will send a Contract Signatory Pack including the DPSA and a customer-specific pre-populated Order Form via DocuSign to the named contact when you tell us you are ready to sign.
- Signed documents need to be returned ten working days after issue.
- We ask that you review, sign and return the contract via DocuSign.
- Two optional reporting services are available to relevant customers under Section 8 of the DPSA Order Form. If you select one of these options, you will be able to specify which reports or MI services you require as part of the onboarding process.
- Direct any queries to DPSA.Velonetic@dxc.com

DSP SIGNATURE CHASING

- Once the DPSA has been sent to the signatory, via Docusign, the date will be logged. If we have not received a signed DPSA, within 10 working days of issue, we will commence chasing action.
- The Chasing process will consist of the following steps:
- Stage 1 – the SPOC (cc signatory) will be emailed requesting the return of the signed contract or asking whether there are any obstacles preventing signature that we can assist with resolving. (For any contract queries please contact **DPSA.Velonetic@dxc.com**)
- Stage 2 – a second email will be sent, (if we have received no response to our first chaser), again to the SPOC (cc signatory), requesting the return of the signed contract.
- Stage 3 – if, after the second email, we still have received no response to our chasers, and third and final email will be sent to the SPOC (cc signatory).

TERMINATION LETTER

- We will issue a Termination Letter laying out the conditions of the termination of the existing FERN agreements. [Date TBC]
- The termination letter will comprise of two elements:
    - DPSA Service commencement date
    - Conditions of acceptance
- Please sign and return the letter via DocuSign by [date TBC]
- Commencement of the DPSA and the services under it are conditional on the signing of the termination letter.
- For queries, contact DPSA.Velonetic@dxc.com

Billing and Invoicing for Service Charges

The default methods of payment for DPS Service Charges will be via direct debit. Customers paying by direct debit, will receive a 5% discount on subscriptions and service charges as outlined in the DPSA price books that are available in the knowledge repository. If you do not currently pay your subscriptions and service charges via direct debit, you will need to set up a direct debit mandate with Velonetic.

SETTING UP A DIRECT DEBIT – IN DEPTH INSTRUCTION

(Please refer to the instructions outlined below that relate to your customer group)

Company Market carriers

Customer invoicing structure and DPSA charges apportionment rules between charging codes

- During the onboarding phase, Company Market carriers have the option to adjust or implicitly confirm their current invoicing structure, which involves multiple charging codes. This invoicing system enables customers to allocate their transactional charges among different charging codes. Each charging code is associated with a list of stamp codes that directs and allocates charges to the appropriate invoice. Velonetic issues a monthly invoice for each charging code.
- For instance, Customer A, a DPSA signatory, may have three charging codes: A1, A2, and A3. Consequently, Customer A will receive three invoices every month, one for each charging code. These charging codes may correspond to various factors such as geographies, business classes, legal entities, or DPSA service recipients, based on the preferences of Customer A.
- Charges for annual subscriptions, user access, standard optional reporting, and Management Information (MI) Analytics services will be invoiced centrally by default to the charging code with the highest total 2023 charges. Alternatively, customers can designate another primary charging code to bear these costs.

Action

- To modify their existing invoicing structure or to nominate a primary charging code, customers must contact Velonetic at VeloneticDirectDebit@dxc.com. Customers can group their stamp codes as desired, and Velonetic will assign a charging code to each group. They can then select a primary group responsible for centrally charged services.
- In the absence of instructions, Velonetic will continue to use the current invoicing structure.

Important note for large organisations

- Customers who sign DPSA multiple times (ie: submitting several order forms in the company market) should carefully consider their invoicing structure and ensure that existing charging codes fall under a signatory. Each charging code needs to be assigned to a signatory as this will determine the subscription tier of this signatory. Please kindly provide this mapping if it applies to your situation.
- Regarding charges for dual market users, organisations trading in both Lloyd's and Company markets do not require separate logins (unless the default setup is not selected), thus avoiding duplicate user access charges. These charges are allocated to managing agents by default, as they cannot be split between the two markets. Detailed billing reports will provide itemised breakdowns of these charges.

Payment method

- The default method of payment for all DPSA services charges is direct debit. Customers who choose an alternative payment method will not receive the 5% discount already included in the price book.

Action:

- If your organisation does not currently pay invoices via direct debit, you need to establish a direct debit mandate (DDM) with Velonetic. One mandate is required for each customer bank account. The template and completion instructions are available at the end of this section.

Itemised billing backup data

- Customers will have access to reports that reconcile transaction volumes, pricing units, and charges.

Lloyd's market managing agents

Customer charges apportionment between managing agents and syndicates:

- Charges for annual subscription, user access, standard optional reporting and MI Analytics services will be invoiced "centrally" to managing agents. Transactional charges will continue to be invoiced at syndicate/YOA level.
- Regarding charges for dual market users, organisations trading in both Lloyd's and Company markets do not require separate logins (unless the default set up is not selected), this avoids duplicate user access charges. These charges are allocated to managing agents by default, as they cannot be split between the two markets.
- Detailed billing reports will provide itemised breakdowns of these charges.

Payment method

- The default method of payment for all DPSA service charges is direct debit. Customers who choose an alternative payment method will not receive the 5% discount already included in the price book.
- Customers are not required to set up a direct debit mandate (DDM) for charges at the syndicate level, as Lloyd's STFO will continue to handle the payment of Velonetic services charges on Velonetic's behalf.

Action

- Managing agent must establish a direct debit mandate (DDM) with Velonetic. The template and completion instructions are available at the end of this section.

Itemised billing backup data

- Customers will have access to reports that reconcile transaction volumes, pricing units, and charges.

Brokers

Payment method

- The default method of payment for all DPSA service charges is direct debit. Customers who choose an alternative payment method will not receive the 5% discount already included in the price book.

Action:

- Establish a direct debit mandate (DDM) with Velonetic. We require one mandate per DPSA signatory (i.e.: encompassing all broker codes falling under this signatory, including all service recipients). The template and completion instructions are available at the end of this section.

Itemised billing backup data

Customers will have access to reports that reconcile transaction volumes, pricing units, and charges.

Mandate form and completion instructions

- Complete and sign the DDM;
- Send the original DDM via post to: Velonetic Finance, Gallery 4, One Lime Street, London, EC3M 7HA *(Original might be required by your bank);*
- Email the tracking number and a digital copy of the signed DDM to VeloneticDirectDebit@dxc.com.

We highly recommend customers to set up their DDMs at least 75 days before DPSA service commencement date to ensure the DDM is active in time for the first invoice. Banking partners may require additional time to process requests.

UNUSED PORTIONS OF IMR LICENCES

- Customers will be entitled to a refund for unused portions of IMR Licences.
- We will calculate and process these credits automatically.

Onboarding activities

Organisation set-up

To access the services each organisation must be set up on the Digital Processing Platform (DPP). For each contracting customer, we will create an Organisation Party on the platform and set up how that organisation wishes to interact with the services and which market groups (broker codes and carrier codes) that organisation oversees.

We will start setting up organisations once the parties portal goes live on the production environment of the platform. To successfully set up each organisation we will need to enter the following information:

Organisation details

Organisation name, address and contact details. Which role it plays in the market – Carrier, Broker, Third Party. And in which markets it wishes to transact via Velonetic services; Lloyd's market, company market, global market. If you are a carrier that operates as a broker via an internal service company, you will need to set up two organisations. We will guide you through this on the onboarding forms.

Services required

We will set up which DPS services your organisation has opted to subscribe to from the Order Form including which settlement options.

Messaging Preferences

We will set up which messaging services you wish to use for Phase 1. Full information on supported messaging standards, including customised EDIs (also referred to as bespoke EDIs), is on our website Resources | Blueprint Two (velonetic.co.uk)

To ensure a smooth and secure data exchange between your systems and ours, you need to provide us with addresses and certificates for the DRI and Writeback services. For EDI connectivity, we also require the support of up-to-date encryption cyphers in your systems.

EDI, DRI and Writeback are services that allow you to send and receive data between your systems and Velonetic. These services communicate over Secure Shell (SSH) protocol or HTTPS. To authenticate and establish a secure connection we require the following information

For EDI, DRI and Writeback we require:

- The location or IP address of the network egress point that will send DRI and Writeback messages to Velonetic systems so that we can add these to our approved sites list. We only approve specific addresses on request to maintain systems security. You may need to obtain this from your software vendor.

- A public certificate for the DRI and Writeback connectivity. This secures the connection over the internet. We prefer the certificate in the x509 PEM (Privacy Enhanced Mail) format. For information on PEM and conversions from other formats please visit the standards page on SSL.com - PEM, DER, CRT, and CER: X.509 Encodings and Conversions - SSL.com. You will need the support of your technical teams.

For EDI we also require:

- The use of modern SSL ciphers. SSL ciphers are algorithms that encrypt and decrypt data transferred over the network. Modern SSL ciphers provide stronger security and protection against attacks.

We'll include additional guidance with the onboarding forms.

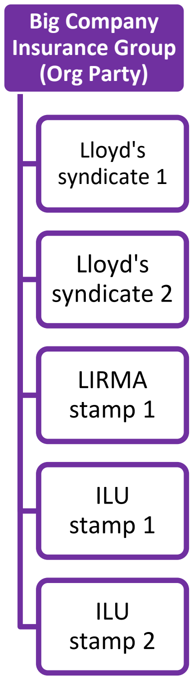
Stamp and code set up

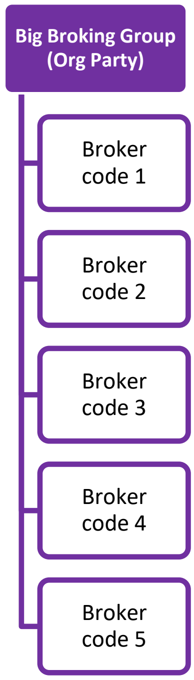
Each organisation can oversee one or more market groups within the platform. These market groups often correspond to legal entities and internal structures. For each group we need to know the name, what market it operates in, the appropriate market ID (broker code, stamp number) as well as the international company identifiers: DUNS and NAIC where applicable.

Important note: The platform identifies each user by their email address, and you can only assign a user ID to one organisation party. Therefore, if you have users who work across multiple entities within your organisation, you will need to carefully consider how you choose to set up your organisation party and the market groups it oversees. For example, if you are a broking group that manages several different broker codes and a single user needs to have access to more than one code, we recommend that you register your party organisation at 'group' level and set up each sub-entity as a market group within that one organisation. This will allow a single user to work on more than one broker code using one email address. If you wish the sub entities to be separate, the same user will require a unique email address for each entity, and you will incur a user access charge for each of these 'users'.

Example of single organisation party option

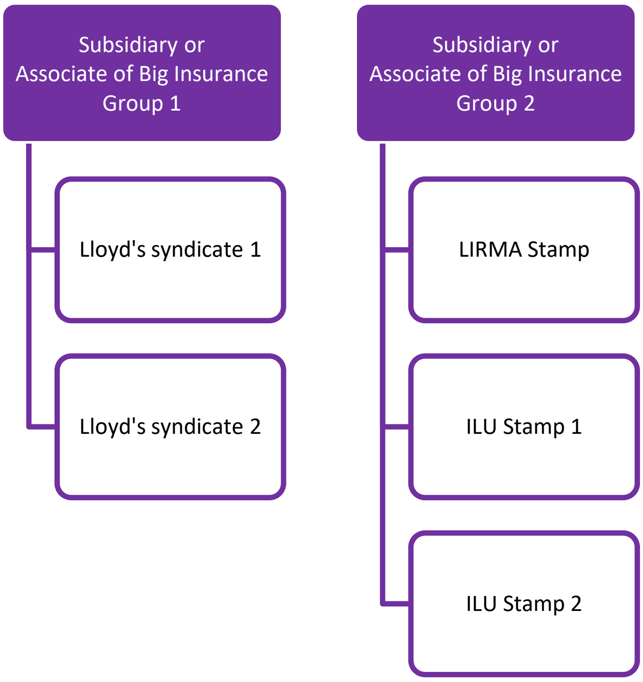
In these examples the firm has set up one organisation party, users can work across one or more ‘markets’ using the same email address and login. They will only have access to the codes/stamps to which they are assigned.





Example of multiple organisation party option

In this example the firm has set up two organisation parties reflecting its internal operating or legal structure. A user set up under Subsidiary or Associate of Big Insurance Group 1 could be given access to both Lloyd’s syndicate 1 and Lloyd’s syndicate 2 using the same login if required. They would not be able to access the market groups set up under Subsidiary or Associate of Big Insurance Group 2 using this login. If they needed to access these market groups, they would need a separate unique email address associated to the second organisation party. Although this example shows a carrier, the same principle applies to a broker and broker codes.



If you have users who work across multiple markets and entities within a carrier or a broker, we recommend setting them up under one organisation party. We can support you with this if you have complex arrangements and will provide further detailed guidance alongside the onboarding forms.

Payment and banking preferences for settlement

Current banking information and currency preferences will not change unless you request us to change them. Customers are responsible for checking that their settlement direct debit mandates are up to date (see separate section on Billing and Invoicing for Service Charge direct debits). If you use Vitesse for direct payments, it is your responsibility to arrange services with Vitesse and advise Velonetic once you have completed this. There is space on the onboarding form to provide your Vitesse account number.

BANKING

- We may need to check your banking information is set up correctly and will inform you of this in your onboarding form when we issue it.
- Ensure that your banking mandates and direct debit mandates for settlement are still valid.

Reporting set up

All existing reports, including bespoke reports will be migrated across to our new reporting service powered by Qlik Sense. You will be able to select additional reports, including a regulatory reporting suite, as part of the onboarding process through your onboarding form. These reports may be chargeable so please refer to the price book before requesting additional reports.

REPORTING

- The Lloyd’s Engagement Team contacted you in February to ask you to supply the name and email address of the recipient of each report and what you use the report for, e.g., is it uploaded to a database. They supplied you with a list of the reports you currently receive so that we can check compatibility.
- You will automatically receive the same reports you receive today when we move to the new reporting service.

REPORTING PORTAL - QLIKSENSE

- We will set up your users on the Qlik Sense portal to ensure that the relevant permissions and access are retained.
- Once a user is set up, they will receive an invitation email to activate their access to Qlik Sense. **This invitation includes a link that expires within 12 hours.** If you do not activate your access, you will not be able to view your reports.

> Your administrator has just requested that you update your qliksense account by performing the following action(s): Configure OTP, Update Password, Verify Email. Click on the link below to start this process.
>
> Link to account update
>
> This link will expire within 12 hours.
> If you are unaware that your administrator has requested this, just ignore this message and nothing will be changed.
>
> This email will come from “TBA”

Figure 1: *Example of Qlik Sense registration email*

- Once you have activated your access, and a report is available, the user will receive an email advising them their report is available to view on the Qlik Sense portal. The report will come from **sm.business.intelligence@dxc.com**
- Users will need to log on to the Qlik Sense portal to access their reports.
- A user manual for reporting via Qlik Sense is available on the Velonetic education learning platform.

User Access Management

User admin set up

Once we have set up the organisation on the DPP, we'll then set up your user administrators. We asked customers to supply the names of at least two user administrators in February. If you haven't done this, or need to update or check your user administrators, email **DPSA.Velonetic@dxc.com**

DIGITAL PROCESSING SERVICES – PARTIES PORTAL ACCESS

- Velonetic will start setting up user admins once the parties portal goes live in the production environment of the platform.
- You have already been asked to provide the details of your nominated user admins. If you need to check or update these, please contact dpsa.velonetic@dxc.com
- We will add the user admins to the DPP.
- An email will be sent to the user administrators from <LMDataServicessupport@dxc.com> advising them of their log in details with instructions to set up multifactor authentication.

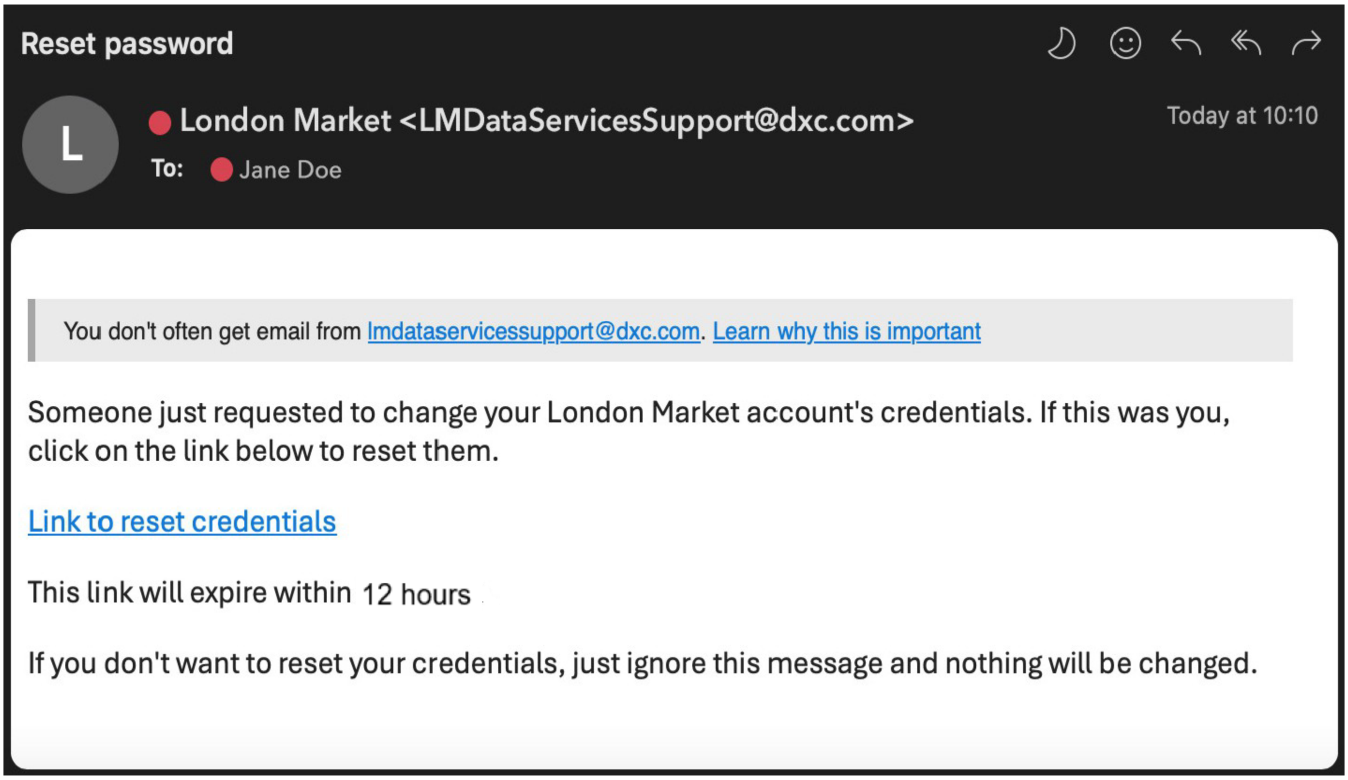


Figure 2: *Example of User Admin access email*

Supported One Time Password Authenticators	
Free OTP	Okta
Microsoft Authenticator	Authy
Google Authenticator	Last Pass
Dashline	1Password
EnPass	Duo Mobile
Symantec VIP	

User Set up

Your user admins are responsible for setting up and managing role-based access for your organisation's users of the DPP. They do this using the Parties portal. You will need to identify the level of access everyone should have according to their role.

User Access Groups for DPS – Brokers

This table describes the default roles that **System Admin** users can assign to users in their **Broker** organisation.

Portal	Party Person Access Group	Permissions
PARTY	EXT_PARTY_PERSON_ADMIN	• Manage my organisation's users.
PARTY	EXT_PARTY_ORG_VIEWER	• View my organisation's data.
IPOS	PR_Broker	• View dashboard • View TA/FA status and create new TA/FA • View Premiums
IPOS	Process_Enquiry_Broker	• View premiums
IPOS	Process_Release_Broker	• Search and release Delinked Premiums.
ICOS	Delegated_Broker	• Delegated_Broker
IPOS	Process_Query_Broker	• Respond to premium queries.
IMR	IMR_Broker	• Create and edit work packages via accounting and settlement. • View and search via the document repository
ICOS	Brokers	• View dashboard • Create, view, download and edit claims • Edit reserves on claims and settlements • View and respond to queries • Create recipients in Vitesse • View dashboard • Create, view, download and edit claims • Create and view settlements • Raise, view and respond to queries

Portal	Party Person Access Group	Permissions
ICOS	Fees_Broker	• View dashboard • Create, view, download and edit claims • Create and view settlements • Raise, view and respond to queries
ICOS	Experts	• View all notifications relevant to my organisation. • Mark notifications relevant to my organisation as read/unread. • Delete notifications relevant to my organisation. • Search for a claim. • View the status of a claim. • View the agreement/denial comments on a submission.
LORS	LORS_Senior_Broker	• Create transaction • Create grouping of transactions • Save a transaction in draft • Submit transaction for authorisation • Amend or withdraw a transaction version not yet sent to settlement. • Cancel or Cancel/Replace a transaction that has been sent for settlement. • Save transactions as information only, that can be search by both myself and my clients. • View activity by my colleagues and LORS Carriers on a Transaction.
LORS	LORS_Junior_Broker	• Create transaction • Create grouping of transactions • Save a transaction in draft • Amend or withdraw a transaction version not yet sent to settlement. • Save transactions as information only, that can be search by both myself and my clients. • View activity by my colleagues and LORS Carriers on a Transaction.
LORS	LORS_Enquiry	• Search transactions

User Access Groups for DPS - Carriers

This section describes the default roles that **System Admin** users can assign to users in their **Carrier** organisation.

Portal	Party Person Access Group	Permissions
PARTY	EXT_PARTY_PERSON_ADMIN	• Manage my organisation's users
PARTY	EXT_PARTY_ORG_VIEWER	• View my organisation's data.
IPOS	PR_Carrier	• View dashboard • View TA/FA status • Agree or reject TA/FA • View premiums
IPOS	Process_Enquiry_Carrier	• View premiums.
IPOS	Process_Corrections_Carrier	• Underwriter reference corrections.
IPOS	Process_Query_Carrier	• Search and view delinked premiums.
IMR	IMR_Carrier	• View workpackages • Search, open and add documents on the document repository
ICOS	CWS_CARRIER_MANAGER	• Manage my organisation's CWS service
ICOS	CWS_CARRIER_TEAM_MANAGER	• Manage my team's CWS service
ICOS	CWS_CARRIER_ADJUSTER	• A member of a team that is subscribed to the CWS service.
ICOS	CWS_CARRIER_ADMINISTRATOR	• Administer/manage CWS users
ICOS	Delegated_Carrier	• Delegated Carrier
ICOS	Carrier	• Claims dashboard, ability to respond to and view claims, view, download and respond to settlements. • Create and view settlements, edit reserves on settlements • Raise, view and respond to queries (including closing them). • Create recipients in Vitesse.
ICOS	FEES_CARRIER	• View dashboard • Respond to and view claims • Create, view, download and respond to settlements • Edit reserves on settlements • Raise, view and respond to queries.

Portal	Party Person Access Group	Permissions
LORS	LORS_UnderWriter	• Authorise ORI Transactions (singleton, or within a LORS settlement grouping) for Settlement • Object with reason to respond to Broker • If lead/market lead, Create Market notes for other LORS Carrier Codes also involved in the ORI Transaction • Amend regulator details entered by the Broker e.g. Tax Code, Audit Code etc • Search transactions flagged as information only (not sent to Settlement). • Search and View Transactions within the broker number(s) associated with my user account in LORS • View activity log of audit points of change on a transaction by colleagues and the Broker • Conduct MI reporting of my organisation's data where we are part of a LORS transaction • View heritage data where my organisation was valid participant on a year of account
LORS	LORS_UnderWriter_Junior_Access	• If lead/market lead, Create Market notes for other LORS Carrier Codes also involved in the ORI Transaction • Amend regulator details entered by the Broker e.g. Tax Code, Audit Code etc • Search transactions flagged as information only (not sent to Settlement). • Search and View Transactions within the broker number(s) associated with my user account in LORS • View activity log of audit points of change on a transaction by colleagues and the Broker • Conduct MI reporting of my organisation's data where we are part of a LORS transaction • View heritage data where my organisation was valid participant on a year of account
LORS	LORS_Enquiry	• Search transactions

Technical Set-up

Market Gateway set up and connectivity check

As part of your organisation set up, Velonetic will automatically register your organisation for access to the market gateway. You will receive a registration email directly from our market gateway partner, ACORD, containing the credentials you will need to complete your set up. We recommend that you test that you can successfully connect to the market gateway using their test message functionality. You are responsible for these checks.

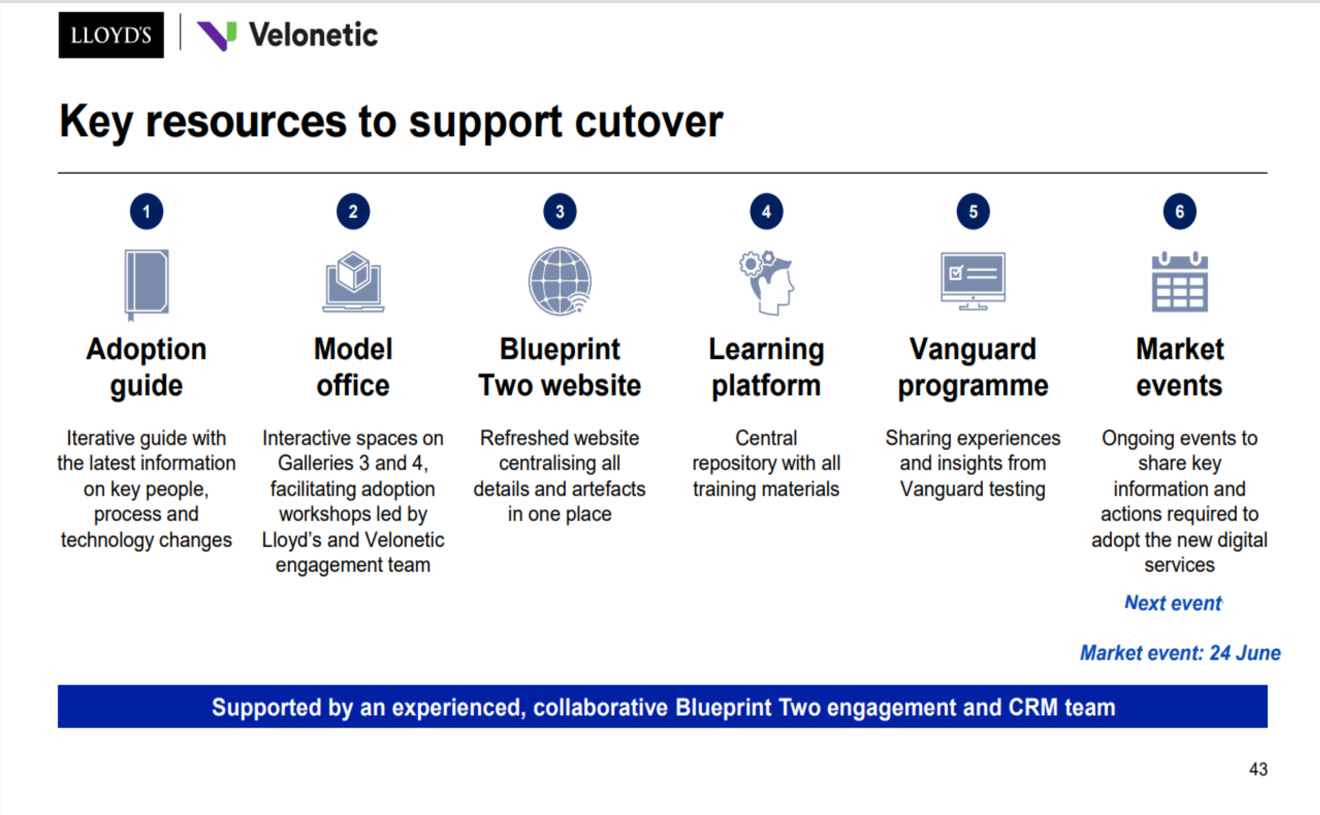
Ensuring you can access URLS and IP addresses

The new platform and services are provided via cloud-based services and can be accessed via a web browser as well as by direct messaging. As part of your preparation, you will need to ensure that all URLs and IP addresses are accessible via your organisation’s network and firewalls – known as ‘Permit Listing’ or ‘Allow Listing’.

We will publish the final versions of these on the website when they are confirmed.

Post go live support

We will offer a period of 'hyper care' to all customers to help them with any platform and service access issues for a period of four weeks after go-live. We are still developing this offer and will share an update once available.



What can our customers expect from us?

During the onboarding process we will keep the market updated of any key changes and remind you of any key activities due. We may also need to contact you to provide further information and guidance, or to request extra information that we need from you. We will contact you using your SPOC details, unless it is specifically related to user set up, in which case we'll contact your primary user admin.

Our customers can expect the following activities in the run up to the cutover to phase one digital services.

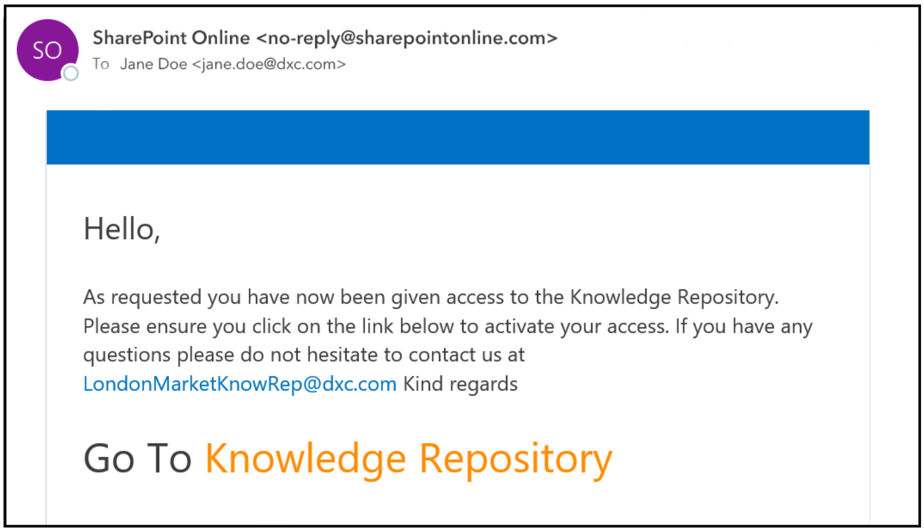
Knowledge Repository

We will provide a knowledge repository to hold all the information related to the DPSA including compliance documentation.

ACCESS TO THE KNOWLEDGE REPOSITORY

- The knowledge repository contains the DPSA and relevant supporting documentation.
- We have already given your nominated SPOC access to the relevant sections of the knowledge repository. Send any requests for changes or additions to your access to DPSA.Velonetic@dxc.com.
- If you have already been set up, general access requests or issues related to the knowledge repository should be sent to LondonMarketKnowRep@dxc.com.

- New requestors will receive an ‘access invitation’ by email from <sharepointonline.com> see example below.


SharePoint Online <no-reply@sharepointonline.com>
To Jane Doe <jane.doe@dxc.com>

Hello,

As requested you have now been given access to the Knowledge Repository. Please ensure you click on the link below to activate your access. If you have any questions please do not hesitate to contact us at LondonMarketKnowRep@dxc.com Kind regards

Go To Knowledge Repository

Figure 5: *Example knowledge repository access email*

Communications

We’ll keep you informed of key onboarding activities via your SPOC and User Admins. We will also keep you informed of wider programme updates and Blueprint 2 updates via our market communications team.

MARKET COMMUNICATIONS

- Market Communications will be issued by email from our customer engagement service – DotDigital - directly to those market participants, including customers, who are on the distribution list(s).
- You can view Market Communications on the
  - Knowledge Repository
  - Insurance Portal
- To sign up for Velonetic news please register at [News | Velonetic]

Onboarding guidance

The onboarding team will provide you with guidance on how to complete your transition to the new services and platform. We will publish and update this guide on our website and on the Blueprint 2 website www.velonetic.co.uk/blueprint-two/resources/onboarding, keep you updated at Blueprint 2 market events and provide a query and response service via dpsa.velonetic@dxc.com.

ONBOARDING GUIDE
• We have prepared this onboarding guide, the first version of which was issued to the market in April, detailing what you need to do to complete your transition and will continue to update it as and when required.

ONBOARDING FORMS
• We will send you a request for your Onboarding information using a guided form. • We cannot complete organisation onboarding until we have received a signed DPSA • It is your responsibility to check, update, and complete the information requested in the form as fully as possible to ensure the information held by Velonetic is accurate and up to date.

Training

We have developed a range of training services to help you get ready for Phase 1.

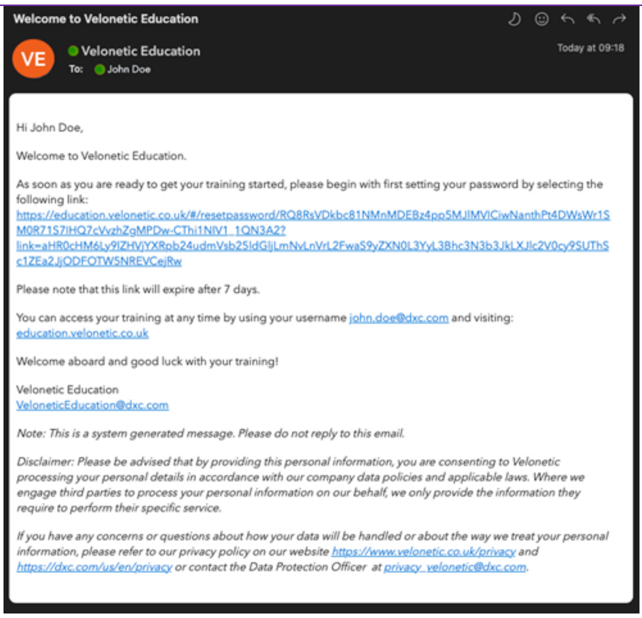
User Manuals and user guides are currently accessible, with new content becoming available over the coming months.

Self-paced training for user administrators to help them understand their role in the Onboarding process and get them ready to set up their users is available now.

Our self-paced training, will be available via the Velonetic Education Platform. As part of your preparation for adopting the Digital Processing Services, we asked you to register your users for access to the education platform so that they can access each module as it is released.

We also offer instructor led training options, for further information see our website Training material | Velonetic

VELONETIC EDUCATION PLATFORM
• On 1st March 2024, we launched our learning platform https://education.velonetic.co.uk/ • We asked your Primary user administrator/s to provide details of all users you would like to be set up with access to the Velonetic Education learning platform. • We have set up requested users on the Velonetic Education Learning Platform. Those that we registered received a welcome email that asked them to change their password on first login.



Welcome to Velonetic Education

VE Velonetic Education
To: John Doe
Today at 09:18

Hi John Doe,

Welcome to Velonetic Education.

As soon as you are ready to get your training started, please begin with first setting your password by selecting the following link:
https://education.velonetic.co.uk/#/resetpassword/RQ8RsVDkbc81NMnMDEBz4pp5MJIMVICiwNanthPt4DWsWr1SM0R71S7IHQ7cVvzhZgMPDw-CThi1NIV1_1QN3A2?link=aHR0cHM6Ly9lZHVjYXRpb24udmVsb25ldGljLmNvLnVrL2FwaS9yZXN0L3YyL3Bhc3N3b3JkLXJlc2V0cy9SUThSc1ZEa2JjODFOTW5NREVCejRw

Please note that this link will expire after 7 days.

You can access your training at any time by using your username john.doe@dxc.com and visiting:
education.velonetic.co.uk

Welcome aboard and good luck with your training!

Velonetic Education
VeloneticEducation@dxc.com

Note: This is a system generated message. Please do not reply to this email.

Disclaimer: Please be advised that by providing this personal information, you are consenting to Velonetic processing your personal details in accordance with our company data policies and applicable laws. Where we engage third parties to process your personal information on our behalf, we only provide the information they require to perform their specific service.

If you have any concerns or questions about how your data will be handled or about the way we treat your personal information, please refer to our privacy policy on our website https://www.velonetic.co.uk/privacy and https://dxc.com/us/en/privacy or contact the Data Protection Officer at privacy_velonetic@dxc.com.

Figure 3: *Example of Velonetic Education Learning Platform registration email*

- When we add new content, the learning platform will notify you by email.
- Additional Users and/or modifications can be made by contacting **veloneticeducation@dxc.com** using the format below. This will include leavers and joiners.

First Name	Last Name	Email Address	Company Name	What activity do you perform in the market

- The first iteration of user manuals was added to the Velonetic Education Learning Platform on the 28th March 2024. Further iterations are planned.

Customer satisfaction

Our aim is to ensure that your users can access our digital services and platform in readiness for the launch of Phase 1 Services. We want to make sure that you know what you need to do and when, that you can track your progress through the process and that you know how to get help, and get it, when you need it.

We need your feedback to tell us what's working and where we can make things better so we can work together to improve the process where this is possible. We won't be able to change the design of the platform itself, but we can iterate to improve our tools, guides and process.

ONBOARDING SUPPORT

- During the onboarding process, if you need help or have questions, please contact **dpsa.velonetic@dxc.com.**
- We aim to answer all queries within five working days.

WHITE PAPER

A White Paper was published in May 2024 following consultation with market associations designed to:

Support and aid decision makers.

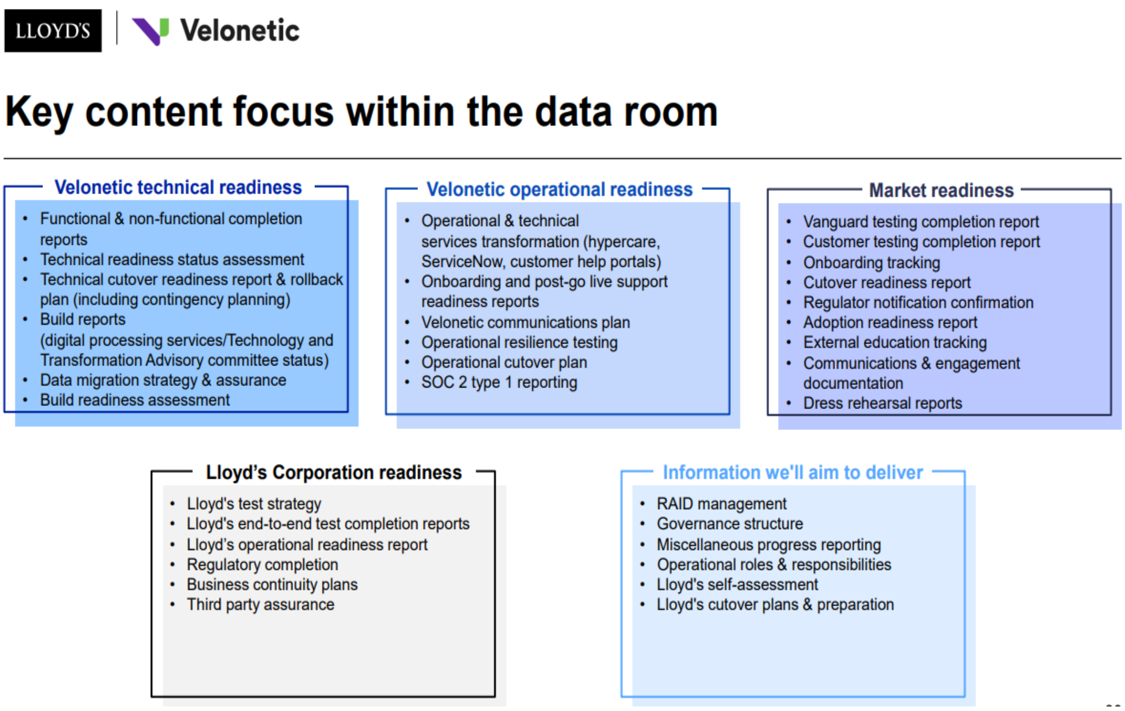
To assure the market of a transparent governance around decision making for phase one cutover, and that governance is thorough and well-established across Velonetic and Lloyd's. The acceptance criteria, assurance mechanisms and tolerance thresholds are in place for programme decision-making and were also shared within the white paper.

Further transparency was provided on:

- Nature of changes, testing, cutover approach and contingency and risk mitigation planning
- Assurance given to Lloyd's and Velonetic by their own assurance providers.
- Artefacts made available to the market to evidence outcomes of assurance activities.

DATA ROOM

- The data room was launched in May and updated regularly as testing and assurance activities progress through their stage gates.
- We have provided access all relevant contacts at each Velonetic customer.
- The data room is designed to provide market firms with well-structured information to support risk management and governance around cutover.
- The data room supports a Q&A function to facilitate the central management of queries around the artefacts provided.



ONBOARDING TRACKER

- We've developed a tracker for our onboarding team to use that will record your progress through the onboarding journey. This will ensure that we jointly complete all the required activity.
- We'll remind you of key activities you need to carry out and if they become overdue.
- We can inform you of what steps you have outstanding and how you are progressing on request.
- We have built BI dashboards for the BP2 leadership team and governance forums, BP2 Adoption Coordination group, BP2 Engagement team and Velonetic CRM team to track onboarding progress and to identify where we need to provide support or unblock.

FEEDBACK

Onboarding guide

- Please let us know how you have found this onboarding guide and what we can do to improve it by completing this feedback questionnaire.

Onboarding process

- We will issue a customer satisfaction questionnaire following the completion of the onboarding process.
- Please share your feedback on your onboarding experience to help us continue to improve the service.

Further Support

For further support, please contact your Blueprint 2 Engagement partner at:

(https://www.velonetic.co.uk/blueprint-two/our-engagement-communities), your Velonetic customer relationship manager, (**https://www.velonetic.co.uk/contact-us** or email ServiceTeamCore@dxc.com) or visit our website where you can access all of our guides and market updates: https://www.velonetic.co.uk/blueprint-two.

Additions/Amendments

Section	Details of Addtions/Amendments
Introduction	Wording amendment
Timeline	Updated to reflect changes
User Administrators	Date amendment
DPSA signature chasing	Process information added
Termination Letter	Information updated
Termination Letter	Date amendment
Setting up a Direct Debit	Further process information added
Unused portions of IMR Licenses	Further process information added
Organisation set up	Date amendment
User Admin set up	OTP list added
User Admin set up	Activation email updated to reflect correct timescale
User set up	Wording amended
User set up	Date amendment
Technical set up	Wording amended
Post go live support	Support slide added
Training	Wording amended
Onboarding Forms	Wording amended
White Paper	Section added
Data Room	Section added